

# Middle East & Africa Digital PCR and Real-Time PCR Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/M6D362490CAAEN.html>

Date: January 2026

Pages: 160

Price: US\$ 3,450.00 (Single User License)

ID: M6D362490CAAEN

## Abstracts

The Digital PCR and Real-Time PCR market in the Middle East and Africa is projected to grow significantly, reaching approximately US\$ 1,009.1 million by 2031, up from US\$ 589.9 million in 2024, with an estimated compound annual growth rate (CAGR) of 8.0% from 2025 to 2031.

## Executive Summary and Market Analysis

The Middle East and Africa's digital PCR and real-time PCR market is poised for substantial growth in the coming years. This growth will be primarily driven by the enhancement of diagnostic capabilities in the region and ongoing advancements in laboratory technologies. Countries like China, the United Arab Emirates, Saudi Arabia, and South Africa are expected to lead the market, bolstered by increased investments in healthcare infrastructure and biotechnology research.

Key factors contributing to market growth include the development of advanced reagent systems, the introduction of fully automated platforms, and the upgrade of high-precision instruments, all of which enhance the efficiency and accuracy of molecular diagnostics. Additionally, the growing availability of innovative PCR-based products for diagnostic and research laboratories is generating strong demand. Increased awareness of these technologies, facilitated by scientific conferences, workshops, and symposia, has also played a significant role in market expansion.

Government initiatives aimed at modernizing healthcare systems and promoting biomedical research are further expected to drive the growth of the digital PCR and real-time PCR market across the region.

## Strategic Insights

### Market Segmentation Analysis

**By Product and Services:** The market is divided into Instruments, Reagents and Consumables, and Software and Services, with Reagents and Consumables holding the largest market share in 2024.

**By Applications:** The market is segmented into Infectious Diseases Testing, Oncology Testing, Blood Screening, Transplant Diagnostics, and Others, with Infectious Diseases Testing leading in market share in 2024.

**By End User:** The market includes Hospitals and Diagnostic Centers, Research Laboratories and Academic Institutes, Pharmaceutical and Biotechnology Companies, Clinical Research Organizations, and Forensic Laboratories, with Hospitals and Diagnostic Centers holding the largest share in 2024.

**By Type:** The market is categorized into Digital PCR and Real-Time PCR, with Real-Time PCR dominating the market in 2024.

### Market Outlook

According to the National Organization's data on genetic conditions, over 15,500 individuals are diagnosed with genetic disorders annually. The adoption of digital PCR is increasing as pathologists utilize this technology to target specific DNA sequences for clinical tests. Digital PCR allows for the isolation of rare genetic mutations that are challenging to detect with real-time PCR.

The COVID-19 pandemic significantly impacted the growth of the digital PCR and real-time PCR market, as the demand for clinical diagnostics surged. Most diagnostic tests for COVID-19 relied on RT-PCR, leading to increased focus on research and development in the biotech and pharmaceutical sectors. For instance, Roche introduced the Cobas 5800 System in February 2022, enhancing its COVID-19 PCR portfolio and providing efficient testing solutions for various laboratory settings.

The rising incidence of genetic and infectious diseases, where dPCR and qPCR techniques are applicable for diagnosis and treatment, supports the market's growth.

## Country Insights

The market is segmented by country into South Africa, Saudi Arabia, the United Arab Emirates, and the Rest of the Middle East & Africa, with Saudi Arabia holding the largest market share in 2024. The prevalence of genetic diseases in Saudi Arabia, largely due to consanguineous marriages, has led to increased premarital genetic screening, which is now mandatory. This initiative aims to reduce hereditary blood diseases, driving the demand for digital PCR and real-time PCR technologies. Additionally, the rising number of cancer cases in Saudi Arabia, with approximately 28,113 new cases reported in 2022, further propels the demand for these diagnostic technologies.

## Company Profiles

Key players in the market include Abbott Laboratories, F. Hoffmann-La Roche Ltd, Thermo Fisher Scientific Inc, bioMerieux SA, Bio-Rad Laboratories Inc, QIAGEN NV, Agilent Technologies Inc, Takara Bio Inc, Danaher Corp, and Countable Labs. These companies are employing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products.

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