

# **Middle East & Africa PCR Technologies Market Forecast to 2030 - Regional Analysis - by Technology (Real-Time PCR, Conventional PCR, Reverse Transcription PCR, Digital PCR, Multiplex RT PCR, Hot Start PCR, and Others), Offerings (Reagents & Consumables, Instruments, and Software & Services), Application (Gene Expression Analysis, Genetic Sequencing, Genotyping, Nucleic Acid Synthesis, Standard Validation, Point of Care Diagnostics, Environmental Application, and Others), and End User (Hospitals & Diagnostic Centers, Academia & Research Institutes, Pharmaceutical & Biotechnology Companies, and Others)**

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## **Abstracts**

The Middle East & Africa PCR technologies market is expected to grow from US\$ 626.35 million in 2022 to US\$ 1,057.27 million by 2030. It is estimated to record a CAGR of 6.8% from 2022 to 2030.

Rising Prevalence of Genetic and Infectious Diseases Bolsters Middle East & Africa PCR Technologies Market

According to the National Organization's information on genetic conditions or congenital disabilities, genetic disorders are rare conditions, but they collectively comprise over 15,500 positive diagnoses every year. Estimates published in a report by MJH Life

Sciences (US) in 2022 state that ~300,000 newborns are born with sickle cell disease (SCD) globally every year, accounting for ~5% of the global population. Further, as per the June 2020 report by Novartis AG, SCD affects around eight million individuals globally. Around 500 children die from SCD-related complications per day in Africa, where the disease has the highest burden. As a result of the rising incidence of SCDs, the adoption of digital polymerase chain reaction (dPCR) is increasing in pathology centers, wherein this technology is being exploited for targeting various DNA-specific sequences to confirm diagnoses and design various clinical tests. dPCR can target specific DNA sequences in just one molecule of DNA. This tool allows researchers to detect rare genetic mutations that are difficult to identify by using real-time PCR. The COVID-19 outbreak had a significant impact on the PCR technologies market. PCR is a nearly ubiquitous, robust, and reliable technology used in most molecular biology labs to amplify specific stretches of DNA for genotyping, cloning, and analysis of single nucleotide variations. The amplified DNA even serves as the basis for most next-generation sequencing (NGS) preparation. Nearly all diagnostic tests used real-time PCR for testing people having symptoms of COVID-19. Most of the biotech and pharmaceutical businesses shifted their focus toward research and development (R&D) divisions to find novel compounds or therapeutic approaches for COVID-19, which, in turn, benefitted the PCR technologies market. In February 2022, Roche added the Cobas 5800 System, a newly released molecular laboratory instrument, to its COVID-19 PCR portfolio for use in nations that accept the CE certification. These products include the Cobas SARS-CoV-2 and influenza A/B tests, as well as the Cobas SARS-CoV-2 qualitative test. The product offers uniform performance and efficiency in low-, medium-, and high-volume molecular laboratory tests. Thus, the increasing incidence of genetic and infectious diseases supports the growth of the PCR technologies market.

### Middle East & Africa PCR Technologies Market Overview

The Middle East & Africa PCR technologies market is segmented into Saudi Arabia, the UAE, South Africa, and the Rest of the Middle East & Africa. The region is expected to experience significant growth due to an increase in the development of varied reagent systems and automated systems in this region, a wide range of new products in diagnostic laboratories, and a growing number of conferences, meetings, workshops, and symposiums. Saudi Arabia is among the fastest-growing countries in the Middle East & Africa. Changing healthcare infrastructure through public-private partnerships between government and international players strengthens the country's healthcare sector. These partnerships and privatization efforts align with the Saudi government's "Vision 2030" policies to transform the national economy. As per the International Trade

Administration, the Saudi Arabian government invested ~US\$ 65 billion to build the country's healthcare infrastructure as part of Vision 2030. Increased investment in infrastructure and innovation is anticipated to favor the market positively. PCR technologies have wide applications in the diagnosis of infectious diseases, oncology, autoimmune diseases, genetic diseases, HIV/AIDS, and others. It is used by medical practitioners in hospitals, laboratories, and other healthcare facilities and at various stages of the patient treatment process. Further, studies on DNA polymorphism, lung cancer, and colorectal cancer use dPCR and qPCR techniques to assess the mRNA expression of genes, boosting the PCR technologies market. Saudi Arabia has a growing number of genetic diseases due to consanguineous marriage, and thus, the increase in premarital genetic screening drives the market growth. The Government of Saudi Arabia has made it mandatory to undergo premarital genetic screening before marriage to check genetic compatibility to reduce hereditary blood diseases such as sickle cell and beta-thalassemia, which are most prevalent in the country. Therefore, the rising prevalence of genetic diseases and increasing premarital genetic testing in Saudi Arabia drive the market growth. Also, the growing number of cancer cases has fueled cancer research in Saudi Arabia. As per Globocan 2020 data, the country recorded ~27,885 new cancer cases. The five-year prevalence rate for cancer in all ages was found to be 237.4 per 100,000 people, which, in turn, propels the demand for PCR technologies in Saudi Arabia.

Middle East & Africa PCR Technologies Market Revenue and Forecast to 2030 (US\$ Million)

Middle East & Africa PCR Technologies Market Segmentation

The Middle East & Africa PCR technologies market is segmented into technology, offerings, application, end user, and country.

Based on technology, the Middle East & Africa PCR technologies market is segmented into real time PCR, conventional PCR, reverse transcription, digital PCR, multiplex RTPCR, hot start PCR, and others. The real time PCR segment held the largest share of Middle East & Africa PCR technologies market in 2022.

In terms of offerings, the Middle East & Africa PCR technologies market is segmented into reagents & consumables, instruments, and software & services. The reagents & consumables segment held the largest share of Middle East & Africa PCR technologies market in 2022. Further, reagents & consumables segment are categorized into reagents, vials size, and other consumables. Furthermore, vials size is segmented into

0.2ml to 2ml, 0.1 ml to 0.3 ml, 2 ml to 5ml, and other vials. Additionally, instruments segment is bifurcated into benchtop PCR, and portable thermocyclers/PCR.

Based on application, the Middle East & Africa PCR technologies market is segmented into gene expression analysis, genetic sequencing, genotyping, nucleic acid synthesis, standard validation, point of care diagnostic application, environmental application, and others. The gene expression analysis segment held the largest share of Middle East & Africa PCR technologies market in 2022.

Based on end user, the Middle East & Africa PCR technologies market is segmented into hospitals & diagnostic centres, pharmaceutical & biotechnology companies, academic institutes & research laboratories, and others. The hospitals & diagnostic centres segment held the largest share of Middle East & Africa PCR technologies market in 2022.

By country, the Middle East & Africa PCR technologies market has been categorized into Saudi Arabia, South Africa, the UAE, and the Rest of Middle East & Africa. Saudi Arabia dominated the Middle East & Africa PCR technologies market in 2022.

Thermo Fisher Scientific Inc, Promega Corp, QIAGEN NV, bioMerieux SA, Hoffmann-La Roche Ltd, Bio-Rad Laboratories Inc, Becton Dickinson and Co, Takara Bio Inc, Standard Bio Tools Inc, and Ellume Ltd are some of the leading companies operating in the Middle East & Africa PCR technologies market.

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