

Live Cell Imaging Market - Global Outlook & Forecast Market 2022-2027

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Report description:

The global live cell imaging market is expected to grow at a CAGR of 8.44% during 2022-2027.

MARKET INSIGHTS

Live cell imaging is one of the popular techniques for studying live cells and investigating the biological processes in real-time. It utilizes time-lapse microscopy and careful preparation of living cell environments that have made it easier to observe cell-to-cell interactions and study the behavior of single cells and related changes within the cell. In 2021, North America accounted for the highest share of the global live cell imaging market.

Live cell imaging has revolutionized studying cells, processes, and molecular interactions. Imaging techniques for living cells allow scientists to study cell structures and processes in real-time and over time. Such factors have significantly impacted the growth of the market. A few of the most widespread applications include examining the structural components of a cell, the dynamic studying processes, and the localization of molecules.

MARKET TRENDS & DRIVERS

Rising Target Patient Population

Live cell imaging is a vital tool in the study of cancer biology. Although high-resolution imaging is indispensable for studying genetic and cell signaling changes in underlying cancer, live cell imaging is essential for a deeper understanding of the function and disease mechanisms. Around 400,000 children develop cancer every year. Developed and emerging countries are facing the burden of communicable diseases. Most developing countries get exposed due to several factors that include demographic, socio-economic, and geographic conditions. Hence, the growing number of deaths and chronic conditions drive the live cell imaging market.

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Deep Learning & Artificial Intelligence

The role of Artificial intelligence (AI) in life science is rapidly expanding and holds great potential for microscopy. In the past, the power of microscopy for supporting or disproving scientific hypotheses got limited by scale, and the time associated with quantifying, capturing, and analyzing large numbers of images was often prohibitive. Recently, AI has made fast inroads into many scientific fields and the world of microscopy. AI-based self-learning microscopy shows the potential to produce high throughput image analysis that is more effortless and less time-consuming. Newer AI technology allows better visualization of unlabeled live cells over a prolonged period.

Increase in Funding for Cell & Gene Therapy

The demand for regenerative medicine has increased across developed countries, and investments in cell & gene therapy have grown drastically in recent years. The public and private sectors are at the forefront of funding cell and gene therapy developers. Recently, many government organizations and private firms have started funding many biotech start-ups and research institutes that invest in the R&D of cell and gene therapy products. According to the Alliance for Regenerative Medicines, there was a 164% jump in funding for cell & gene therapy in 2019 compared to 2017.

Advancements & Newer Imaging Techniques

Live cell imaging arises from scientific interest coupled with imaging and labeling technology improvements. Putting together various technological advancements with biological interests gives scientists many more ways to use live cell imaging. In particular, exciting progress in probe development has enabled a broad array of nucleic acids, proteins, glycans, lipids, ions, metabolites, and other targets to be labeled. Many recent advancements in microscopic technologies use software that enables a better quantitative image analysis of label-free images.

Also, current microscopy techniques limit the quantity and quality of information available to researchers and clinicians and harm the living cells during long-term studies. Hence new imaging technologies are being developed to overcome various limitations. These advancements will help towards future market growth. For instance, the progress of combining 3D fluorescence imaging and holotomography microscopy has overcome some limitations.

Growing Research-based Activities

In the past two decades, the spending on R&D and the introduction of newer drugs have increased rapidly. In 2019, the pharma industry spent around \$83 billion on R&D. From 2010 to 2019, the number of novel drugs were approved, whose sales increased by 60% compared with the previous decade, with a peak of 59 new drugs approved in 2018. The rising amount of R&D expenditure and the number of R&D activities in the pharmaceutical sector has led to the significant growth of the market.

SEGMENTATION ANALYSIS

-□The global live cell imaging market by product includes sub-segments by equipment, consumables, and software. In 2021, the equipment sector accounted for the highest share in the global live cell imaging market.

Under the equipment sector, live-cell imaging microscopes are opening novel and exciting avenues for studying cellular health, viability, colony formation, migration, and cellular responses to external stimuli. The demand for microscopes is at a larger scale, majorly due to the technological advancements in microscopes and increasing studies into cell behavior.

-□Fluorescence microscopy, confocal microscopy, transmitted light microscopy, and other techniques are included in the global live cell imaging market by technique. Fluorescence microscopy held the largest share of 53.68% in the global live cell imaging market in 2021. Live-cell imaging techniques are involved in a wide spectrum of imaging modalities, including widefield

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fluorescence, confocal, multiphoton, total internal reflection, FRET, lifetime imaging, super-resolution, and transmitted light microscopy.

-□ An increasing number of investigations are using live-cell imaging techniques. Owing to these advances, live-cell imaging has become a requisite analytical tool in most cell biology laboratories. Cell biology, drug discovery, developmental biology, and stem cell are the application's primary segments of the live cell imaging market. In 2021, cell biology accounted for the highest share of 38.72% in the global live cell imaging market.

-□ The end-user market includes segments by pharma & biotech companies, academic & research institutes, and others. Academic and research institutions identify promising discoveries and seek to initiate their development and commercialization. Most new insights into biology, disease, and new technologies arise in academia, funded by public grants, foundations, and institutional funds. The discovery and development of new therapies have and will likely continue to require contributions from academic institutions and the biopharmaceutical industry.

Segmentation by Product Type

-□ Equipment

-□ Consumables

-□ Software

Segmentation by Technique

-□ Fluorescence microscopy

-□ Confocal microscopy

-□ Transmitted light microscopy

-□ Others

Segmentation by Application

-□ Cell Biology

-□ Drug Discovery

-□ Developmental Biology

-□ Stem Cells

Segmentation by End-Users

-□ Pharma & Biotech Companies

-□ Academic & research centers

-□ Others

GEOGRAPHIC ANALYSIS

By geography, the report includes North America, Europe, APAC, Latin America, and the Middle East & Africa. In 2021, North America accounted for the highest share of the global live cell imaging market.

Live cell imaging systems are used for diagnostics purposes, drug discovery & development, and precision medicine. The increase in healthcare expenditures and funding for R&D activities for live cells-driven drug discovery, development, and personalized medicine is one of the major driving factors for leading the North American region. Europe holds the second-largest share of the global market, owing to a growing patient population in need of new treatments such as stem cell therapy and gene therapy, an increasing number of drug approvals for precision medicine, government funding for research-based activities, rapid advancements in live cell imaging, and a variety of other factors.

The APAC region will likely witness the fastest growth in the global live cell imaging market. The significant factors behind this

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growth can be due to the constant rise in cancers and infectious diseases, growing demand for stem cell research studies, rising R&D expenditures, the increased utility of biomarkers for diagnostic purposes, rising awareness for cell & gene therapies, need for precision medicine, and advances in drug discovery & cell and biology development. However, Latin America and Middle East & Africa accounted for minimal shares in the global market.

Segmentation by Geography

- North America
 - o□ THE US
 - o□ Canada
- Europe
 - o□ Germany
 - o□ France
 - o□ UK
 - o□ Italy
 - o□ Spain
- APAC
 - o□ Japan
 - o□ China
 - o□ India
 - o□ South Korea
 - o□ Australia
- Latin America
 - o□ Brazil
 - o□ Mexico
 - o□ Argentina
- Middle East & Africa
 - o□ Turkey
 - o□ Saudi Arabia
 - o□ South Africa
 - o□ UAE

COMPETITIVE LANDSCAPE

The leading players in the market are implementing various strategies such as marketing and promotional activities, mergers & acquisitions, product launches, and approvals. Also, high R&D investments and boosting distribution networks have helped companies enhance their market share and presence.

The global live cell imaging market includes global and regional players. Major players contributing to the market's significant shares include Agilent, Bruker, Carl Zeiss AG, Danaher, Merck KGaA, PerkinElmer, and Thermo Fisher Scientific. Other prominent players in the market include Axion (CytoSMART Technologies), Bio-Rad Laboratories, blue-ray biotech, Etaluma, Grace Bio Labs, ibidi GmbH, KEYENCE, NanoEnTek, Nanolive SA, Nikon, Olympus, and others.

Recent Developments in the Global Market

-□ In 2021, CytoSMART launched CytoSMART Lux3 BR, a new type of bright-field microscope, i.e., a live-cell imaging microscope equipped with a high-quality CMOS camera to assist label-free cell imaging procedures.

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-□ In 2021, the Zeiss group announced that they would launch Zeiss Visioner 1, a Zeiss live cell imaging system, an innovative digital microscope that facilitates real-time all-in-one focus via a micro-mirror array system.

-□ In 2020, CytoSMART Technologies launched CytoSMART Multi Lux, a remote live cell imaging system.

Key Vendors

- Danaher
- Agilent Technologies
- PerkinElmer
- Merck KGaA
- ZEISS
- Thermo Fisher Scientific

Other Prominent Vendors

- Axion BioSystems
- BD
- Bio-Rad Laboratories
- Blue-Ray Biotech
- Bruker
- Eppendorf
- Etaluma
- Grace Bio-Labs
- ibidi GmbH
- Intelligent Imaging Innovations
- KEYENCE
- Logos Biosystems
- NanoEntek
- Nanolive SA
- Nikon
- Evident
- ONI
- Oxford Instruments
- Phase Focus
- Phase Holographic Imaging PHI AB
- Proteintech Group
- Sartorius AG
- Sony Biotechnology
- Tomocube

KEY QUESTIONS ANSWERED

1. □ What is the expected live cell imaging market size by 2027?
2. □ What is the live cell imaging market growth?
3. □ What are the latest trends in the live cell imaging market?
4. □ Who are the market leaders in the global live cell imaging market?
5. □ Which region has the largest live cell imaging market share?

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