

PCR Technology Market Size and Forecast (2020 - 2030), Global and Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Technology (Real-Time PCR, Conventional PCR, Reverse Transcription PCR, Digital PCR, Multiplex RT PCR, Hot Start PCR, and Others), Offerings (Reagents and Consumables, Instruments, and Software and Services), Application (Gene Expression Analysis, Genetic Sequencing, Genotyping, Nucleic Acid Synthesis, Standard Validation, Point of Care Diagnostics, Environmental Application, and Others), End User (Hospitals and Diagnostic Centers, Academia and Research Institutes, Pharmaceutical and Biotechnology Companies, and Others), and Geography (North America, Europe, Asia Pacific, South & Central America, and Middle East & Africa)

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Report description:

The PCR technologies market is expected to grow from US\$ 13.101 billion in 2022 to US\$ 24.524 billion by 2030; it is anticipated to register a CAGR of 8.2% from 2022 to 2030. The rising prevalence of genetic and infectious diseases and surging investments and funds for PCR technologies propel the PCR technologies market growth.

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PCR is crucial in clinical settings as it enables rapid and precise detection of genetic variants, infectious diseases, and biomarkers. A popular molecular biology technique called polymerase chain reaction (PCR) amplifies DNA and RNA sequences, enabling various applications in research, diagnostics, and other areas. In addition, the need for PCR-based diagnostics has been fueled due to the increasing prevalence of chronic diseases and developments in genomic research. Additionally, automation, integration, and ongoing improvements in PCR instruments, chemicals, and software have increased the performance, sensitivity, and efficiency of workflows, thereby driving the expansion of the market.

Rising Prevalence of Genetic and Infectious Diseases Drives the 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. In the US, SCD is one of the most prevalent genetic conditions. According to the Centers for Disease Control and Prevention (CDC), 1 in 500 African Americans is affected by an SCD, and ~1 in 12 of them suffer from the autosomal recessive mutation. As per the June 2020 report by Novartis AG (Switzerland), ~15,000 individuals and 270 newborns are diagnosed with SCDs every year. The disease is most prevalent in emerging nations such as India. Among India's tribal communities, ~18 million people exhibit sickle cell traits (SCTs), and 1.4 million people are suffering from SCDs. 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 using real-time PCR.

The COVID-19 outbreak had a substantial effect 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 is the basis for most next-generation sequencing (NGS) preparations. Nearly all diagnostic tests used real-time PCR for testing people having symptoms of COVID-19. The majority of biotech and pharmaceutical businesses shifted their focus toward research and development 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 and the Cobas SARS-CoV-2 qualitative test. The product offers uniform performance and efficiency in low-, medium-, and high-volume molecular laboratory tests.

Market Opportunity

Increasing Adoption of PCR Techniques in Emerging Countries

In recent years, molecular methods such as PCR have evolved as diagnostic tools, enabling healthcare professionals to diagnose various infectious diseases accurately. It is also considered an indispensable research and diagnostic tool. PCR allows the early diagnosis of disease and hence plays an essential role in disease control. The technique provides reproducible results comparable to different laboratories and is accepted worldwide. PCR techniques are also being widely accepted and utilized in emerging countries. According to the World Health Organization Report on Establishment of PCR Laboratory in Developing Countries 2016, WHO provides technical assistance to establish PCR laboratories in all 11 WHO Southeast Asia countries. Depending on their need, these facilities have adopted different PCR technologies such as reverse transcriptase PCR (RT-PCR), multiplex PCR, real-time PCR, in-situ PCR, and dPCR. The application of PCR technologies is increasing in clinical microbiology, virology, parasitology, biotechnology, and allied fields due to this tool's simple, rapid, and highly specific screening. Thus, the PCR technologies market in developing countries is expected to experience lucrative opportunities during the forecast period.

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The "Global PCR Technologies Market" is segmented based on technology, offerings, applications, end users, and geography.

Technology-Based Insights

The PCR technologies market is segmented based on technology into real-time PCR, conventional PCR, reverse transcription, digital PCR (dPCR), multiplex RT-PCR, hot start PCR, and others. The real-time PCR segment held a larger market share in 2022, and the same segment is anticipated to register a higher CAGR of 8.8% during 2022-2030. Real-time PCR is a nuclear-based approach for identifying specific genetic material in any disease, including viruses. Real-time PCR has become one of the most extensively used methods of gene quantification. Because of its dynamic range, remarkable sensitivity, ability to be very sequence-specific, no post-amplification processing, and ability to increase sample throughput, getting the most out of these benefits necessitates a thorough awareness of the many running options accessible.

Offerings-Based Insights

Based on offerings, the PCR technologies market is segmented into reagents and consumables, instruments, and software and services. The reagents and consumables segment held a larger market share in 2022. Moreover, the same segment is anticipated to register a higher CAGR of 9.1% during 2022-2030. Reagents and consumables are essential parts of the PCR procedures. It includes buffers, probes, enzymes, dyes, vials, kits, and panels. Also, several kits are available for gene expression analysis, SNP genotyping analysis, microRNA analysis, and others. The growing demand for earlier detection of disease, widespread use of consumables and reagents, and expanding demand for PCRs for healthcare, research, and other purposes have significantly fueled the market for the segment. The presence of manufacturers, such as Thermo Fisher Scientific, Kaneka Eurogentec S.A., and QIAGEN, characterizes the reagents and consumables segment. Further, frequent product launches, rising acceptance of technology innovations, and increasing availability of the products are also among the major factors contributing to the market growth for the segment.

Application-Based Insights

Based on application, the 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 a larger market share in 2022. Moreover, the same segment is anticipated to register a higher CAGR of 9.0% during 2022-2030. Gene expression analysis examines how genes are recorded to synthesize functional gene products toward functional RNA species or protein products. The study of gene regulation helps provide visions into normal cellular processes, such as differentiation and abnormal or pathological processes. Researchers can perform gene expression analysis at one of the various levels at which the gene expression is regulated, namely transcriptional, post-transcriptional, translational, and post-translational protein modification.

End User-Based Insights

Based on end users, the PCR technologies market is segmented into hospitals and diagnostic centers, pharmaceutical and biotechnology companies, research laboratories and academic institutes, and others. The hospitals and diagnostic centers segment held a larger market share in 2022. Moreover, the same segment is anticipated to register a higher CAGR of 8.7% during 2022-2030. Hospitals and diagnostic centers contribute a significant market share to the PCR technologies market. Hospitals are the primary centers for patients seeking highly advanced treatment under the guidance of highly trained personnel. Various PCR technologies, such as dPCR and qPCR, offer high sensitivity and specificity, allowing early and accurate detection of pathogens, including bacteria, viruses, and fungi. Hospitals also offer advanced diagnosis and treatment options for patients to treat acute and chronic conditions, and the adoption of PCR techniques is much higher in hospitals and diagnostic centers as they provide healthcare facilities with specialized scientific equipment. Diagnostic laboratories are well-equipped with hi-tech equipment that

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enables easy workflow and management of various samples to be tested. For instance, Bio-Rad Laboratories, Inc., Fluidigm Corporation, Eppendorf, and Agilent Technologies, Inc. offer PCR devices to hospitals and diagnostic centers based on their capacity and requirements.

Food and Drug Administration, Pharmaceutical Research and Manufacturers Association, and Japan Bioindustry Association are some relevant sources referred to while preparing the PCR technologies market research report.

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