

High Throughput Screening Market / HTS Market Size, Share & Trends by Offering (Instruments, Consumables (Reagents, Kits), Software, Services), Technology (Cell-based Assays, Lab-on-Chip, Label-free), Application (Drug Discovery, Life Sciences Research) - Global Forecast to 2029

Market Report | 2024-07-12 | 547 pages | MarketsandMarkets

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Report description:

The global high-throughput screening market size is projected to reach USD 50.2 billion by 2029 from USD 28.8 billion in 2024, at a CAGR of 11.8% during the forecast period. Pharmaceutical & biotechnology companies collaborate with academic institutions, research organizations, and technology providers, enabling them to access external expertise and novel technologies in high-throughput screening (HTS). For instance, in 2023, ChemDiv, Inc. (US) collaborated with the University of Texas Medical Branch (UTMB) to expand its inventory and advance its high throughput screening (HTS) research programs. Furthermore, institutions such as the University of Florida Health (US) collaborate with research groups for various high-throughput screening applications, including assay development, pilot screening, and HTS campaigns. The university's High Throughput Molecular Screening Center supports researchers by providing grant support for their research. Similarly, major pharmaceutical companies, such as Novartis AG (Switzerland), invested USD 3.64 billion in 2023, for exploratory research to discover and develop new drug candidates. This investment was 24% higher than the previous year's investment. With the increased allocation of resources to research and development by pharmaceutical companies and research institutions, there will be a growing demand for efficient and effective drug discovery technologies like high throughput screening (HTS).

"The services segment is set to register highest growth rate during 2024-2029 in the high throughput screening (HTS) market" The high-throughput screening (HTS) offerings market is segmented into consumables, instruments, services, and software. Services in the high-throughput screening (HTS) market include high-throughput screening services, assay development services, cell line development services, and microplate development services. These services are essential for high-throughput screening as they offer tools and processes necessary for effective drug discovery and life science research. Factors such as increasing

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assay complexities for drug development and hit identification, along with the growing demand for cost-effective and specialized high-throughput screening (HTS) expertise drive the growth of the service segment. Service providers also help mitigate research and regulatory risks and allow pharmaceutical and biotechnology companies to focus on their core competencies. Owing to these factors, the high-throughput screening (HTS) services segment has emerged as a beneficial market space for companies and registered the highest growth rate in the market during the forecast period.

"CRO end user segment is set to witness the highest growth rate in the HTS market"

Based on end user, the high-throughput screening market is segmented into pharmaceutical & biotechnology companies, academic & research institutes, contract research organizations (CROs), and other end users. Contract Research Organizations (CROs) are projected to witness the highest growth rate during the forecast period. This growth can be attributed to factors such as the growing trend of outsourcing of R&D activities by pharmaceutical and biotechnology companies to research organizations such as CROs. High throughput screening (HTS) allows CROs to rapidly screen large libraries of compounds against specific targets, making lead discovery more efficient. By identifying unsuitable compounds early, CROs can reduce costs and risks for their pharmaceutical clients, saving time and money and minimizing the risk of late-stage failures. CROs are investing in advanced HTS technologies and infrastructure, allowing them to perform complex screens not feasible for smaller companies. For instance, Labcorp Drug Development services use robotic screening systems, and Parexel integrates AI and machine learning with HTS to enhance their screening capabilities

"Drug Discovery segment accounted for the highest CAGR"

Based on application, the high-throughput screening (HTS) market is segmented into drug discovery, biochemical screening, life sciences research, and other applications. The drug discovery segment is projected to grow with the highest CAGR throughout 2024 to 2029. The key factor driving this segment's growth is the increasing prevalence of diseases leading to a rise in pharmaceutical drug discovery research and development. Pharmaceutical companies are utilizing this technology for lead discovery, target validation, primary screening, compound profiling, and hit identification. Additionally, ongoing advancements such as automation and AI integration, in high-throughput screening (HTS) technologies further aid in making the drug discovery process more efficient and cost-effective supporting the growth of the market.

"Asia Pacific: The fastest-growing country in the high-throughput screening market"

The high-throughput screening (HTS) market is segmented into North America, Europe, Asia Pacific, Latin America, Middle East and Africa. Asia Pacific is projected to register the highest CAGR during the forecast period. Factors such as rising pharmaceutical R&D spending, growing public-private partnerships, and increasing government funding drive the growth of the HTS market in this region.

The primary interviews conducted for this report can be categorized as follows:

- By Respondent: Supply Side -80% and Demand Side - 20%
- By Designation: Managers -45%, CXOs and Directors -30%, and Executives - 25%
- By Region: North America-55%, Europe -15%, Asia-Pacific -15%, Latin America-10%, Middle East and Africa-5%

Lists of Companies Profiled in the Report:

- Thermo Fisher Scientific Inc. (US)
- Agilent Technologies, Inc. (US)
- Merck KGaA (Germany)
- Danaher Corporation (US)
- Revvity, Inc. (US)
- Tecan Group Ltd. (Switzerland)
- Bio-Rad Laboratories, Inc. (US)
- Corning Incorporated (US)
- Mettler-Toledo International Inc. (US)
- Lonza Group (Switzerland)
- Waters Corporation (US)

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- Sartorius AG (Germany)
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- Charles River Laboratories (US)
- Eurofins Scientific (Luxembourg)
- Hamilton Company (US)
- Aurora Biomed Inc. (Canada)
- Gilson Incorporated (US)
- Brand GmbH+Co KG (Germany)
- BMG Labtech GmbH (Germany)
- DIANA Biotechnologies (Czechia)
- A.S. (Czech Republic)
- Creative Biolabs (US)
- HighRes Biosolutions (US)
- Biomat Srl, (Italy)
- Axxam S.p.A. (Italy)
- Sygnature Discovery Limited (UK)
- Crown Bioscience (US)

Research Coverage:

This report provides a detailed picture of the high throughput screening market. It aims at estimating the size and future growth potential of the market across different segments, such as offerings, technology, application, end user, and region. The report also includes an in-depth competitive analysis of the key market players, along with their company profiles, recent developments, and key market strategies.

Reasons to Buy the Report:

The report provides insights on the following pointers:

- Analysis of key drivers (the growing adoption of open innovative models in pharmaceutical & biotechnology companies, rising government funding and venture capital investments, increasing R&D spending, and technological advancements), restraints (high costs of using HTS instruments), opportunities (increasing adoption of HTS technologies in emerging markets, growing research on novel therapeutics and application of HTS technology in drug repurposing), and challenges (lack of skilled operators, and complexities in data management, assay development, and analysis) influencing the growth of the high throughput screening (HTS) market.

- Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the high throughput screening (HTS) market.

- Market Development: Comprehensive information about lucrative emerging markets. The report analyzes the markets for various high-throughput screening opportunities and developments across key geographic regions.

- Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the high-throughput screening (HTS) market.

- Competitive Assessment: In-depth assessment of market ranking and strategies of the leading players like Thermo Fisher Scientific Inc. (US), Agilent Technologies, Inc. (US), Merck KGaA (Germany), Danaher Corporation (US), Revvity, Inc. (US), among others in the high-throughput screening market.

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