

In Situ Hybridization Market by Offering (Consumables, Instruments, Software), Technology (FISH (DNA FISH, RNA, PNA), CISH), Application (Cancer Diagnostics, Research, Discovery), End User (Hospitals, Pharma & Biotech, Academia) - Global Forecast to 2030

Market Report | 2025-07-08 | 460 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The in situ hybridization market is expected to reach USD 2.35 billion in 2030 from USD 1.64 billion in 2025, at a CAGR of 7.4% during the forecast period. The expansion of the in situ hybridization (ISH) market is largely driven by continuous technological advancements within ISH platforms. Innovations such as enhanced probe designs, automation, and multiplexing capabilities have markedly improved assay sensitivity, specificity, and throughput. These enhancements align with the increasing need for precision medicine and the development of laboratory-developed tests (LDTs). Such advancements facilitate the identification of patient-specific genetic markers, solidifying ISH's role as a critical component in personalized treatment approaches. Furthermore, the emerging field of spatial transcriptomics within cancer and neuroscience research underscores the necessity for highly sensitive and multiplexed ISH technologies to analyze gene expression in its tissue context. This demand is propelling ongoing innovation in the ISH sector. Notably, ISH presents distinct advantages over immunohistochemistry (IHC), particularly with its ability to detect direct nucleic acid, which enhances diagnostic accuracy and disease characterization, further contributing to the market's growth.

"The fluorescent in situ hybridization technology segment accounted for the largest technology market share in 2024."

The in situ hybridization market by technology is segmented into fluorescent in situ hybridization and chromogenic in situ hybridization. The fluorescent in situ hybridization technology is further segmented into DNA fluorescent in situ hybridization, RNA fluorescent in situ hybridization, and PNA fluorescent in situ hybridization. In 2024, the fluorescent in situ hybridization technology segment accounted for the largest market share, by technology. The dominant position of this technology segment is attributable to its exceptional sensitivity, specificity, and versatility in detecting genetic anomalies at both DNA and RNA levels. Fluorescence

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

In Situ Hybridization (FISH) provides high-resolution insights for identifying chromosomal rearrangements, gene amplifications, and deletions, making it indispensable in cancer diagnostics, the identification of genetic disorders, and prenatal screenings. FISH enables concurrent detection of multiple targets through the use of various fluorescent probes, catering to both clinical and research needs. Furthermore, the extensive incorporation of FISH in personalized medicine, particularly for HER2 and ALK assessments in oncology, has significantly bolstered its demand in recent years.

"Consumables segment is projected to register the highest CAGR in the global in situ hybridization market during the forecast period."

By offering, the in situ hybridization market is segmented into consumables, instruments, services & software. The consumables segment is further sub-segmented into kits & reagents, probes & probe kits, and accessories & other consumables. The consumables segment is expected to register the highest growth rate during the forecast period. The expansion of the market for consumables in in situ hybridization (ISH) procedures is fundamentally linked to their increasing application in cancer diagnostics and various other disease areas. This uptick in utilization directly correlates with a heightened demand for essential consumables, including probes and probe kits, integral to every ISH assay. As testing volumes escalate in both clinical and research environments, the demand for these materials is poised for steady growth. Furthermore, the ongoing development and approval of advanced ISH-based diagnostic tests, such as Roche's VENTANA Kappa and Lambda Dual ISH mRNA Probe Cocktail assay, are anticipated to further broaden the consumables market. Such innovations enhance the accuracy and specificity of diagnostics for conditions such as B-cell malignancies, thereby incentivizing laboratories and healthcare facilities to increasingly incorporate ISH methodologies into their testing repertoire. This upward trajectory in clinical uptake will consistently drive the demand for corresponding consumables, underpinning robust growth in this segment. Additionally, it presents significant opportunities for key industry players to fortify their market presence through innovative product development and strategic supply chain enhancements.

"The Asia Pacific region is growing at the highest CAGR in the in situ hybridization market during the study period."

The Asia Pacific region is anticipated to experience the highest growth rate in the in situ hybridization (ISH) market throughout the forecast period. This growth is driven by significant advancements in healthcare infrastructure and heightened investments in molecular diagnostics and precision medicine from both government entities and private sector stakeholders. Key nations, including China, India, Japan, and South Korea, are actively advancing research initiatives in genomics and personalized medicine through targeted national programs and funding mechanisms. Concurrently, the increasing prevalence of chronic diseases-such as cancer, infectious diseases, and genetic disorders-is propelling the demand for sophisticated diagnostic technologies like ISH. The burgeoning presence of regional diagnostic firms, coupled with strategic partnerships with global entities, is further facilitating market access and enhancing technology adoption.

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

- By Company Type: Tier 1- 44%, Tier 2- 32%, and Tier 3- 24%
- By Designation: (Managers)- 45%, (CXOs, Directors)- 30%, and (Executives)- 25%
- By Region: North America- 40%, Europe- 25%, Asia Pacific- 20%, Rest of the World- 15%

F. Hoffmann-La Roche Ltd (Switzerland), Merck KGaA (Germany), Thermo Fisher Scientific Inc. (US), Abbott (US), QIAGEN (Netherlands), Bio-Techne. (US), and Biocare Medical (US) are some of the key players in the in situ hybridization market.

The study includes an in-depth competitive analysis of these key players in the in situ hybridization market, with their company profiles, recent developments, and key market strategies.

Research Coverage:

This research report categorizes the in situ hybridization market by offering (consumables (kits & reagents, probes & probe kits, accessories & other consumables), instruments, services & software), technology (fluorescent in situ hybridization (DNA fluorescent in situ hybridization, RNA fluorescent in situ hybridization, PNA fluorescent in situ hybridization), chromogenic in situ hybridization), application (clinical diagnostics (cancer diagnostics, genetic disorder detection, infectious disease diagnostics, and others), research applications (neuroscience, immunology, others), drug discovery & development), end user (hospitals & diagnostic laboratories, academic & research institutes, pharmaceutical & biotechnology companies, contract research organizations) and by region (North America, Europe, Asia Pacific, Latin America, Middle East, and Africa). The report provides

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

in-depth information on significant factors influencing the growth of the in situ hybridization market, including drivers, trends, challenges, and opportunities. A thorough analysis of major industry players has been undertaken to provide insights into their business profiles, products/services, key strategies, collaborations, partnerships, and agreements. Additionally, the report encompasses recent developments, such as new product launches and acquisitions within the in situ hybridization market.

Key Benefits of Buying the Report:

The report will help market leaders/new entrants by providing the closest approximations of the revenue numbers for the overall in situ hybridization market and its subsegments. It will also help stakeholders better understand the competitive landscape and gain more insights to position their business better and make suitable go-to-market strategies. This report will enable stakeholders to understand the market's pulse and provide them with information on the key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

- Analysis of key drivers [technological advancements enhancing in situ hybridization capabilities, increasing adoption of in situ hybridization in precision medicine and laboratory-developed tests (LDTs), rising demand for spatial transcriptomics in cancer and neuroscience research, expansion of multiplex in situ hybridization techniques for multi-gene detection], restraints [high costs of in situ hybridization techniques, competition from alternative molecular diagnostic techniques (qPCR, NGS)], opportunities [advantages over other techniques such as immunohistochemistry (IHC), expansion in emerging markets, growing adoption of companion diagnostics (CDx) solutions], and challenges [technical complexities associated with in situ hybridization].
- Product Development/Innovation: Detailed insights on newly launched and approved products/services of the in situ hybridization market
- Market Development: Comprehensive information about lucrative markets - the report analyses the market across varied regions.
- Market Diversification: Exhaustive information about new products/services, untapped geographies, recent developments, and investments in the in situ hybridization market
- Competitive Assessment: In-depth assessment of market share, growth strategies and service offerings of leading players like F. Hoffmann-La Roche Ltd (Switzerland), Danaher (US), Agilent Technologies, Inc. (US), Abbott (US), Thermo Fisher Scientific Inc. (US), Bioview (Israel), NEOGENOMICS LABORATORIES (US), Qiagen (Netherlands), Bio-Techne. (US) and Biocare Medical (US), among others, in the in situ hybridization market.

Table of Contents:

1	INTRODUCTION	40
1.1	STUDY OBJECTIVES	40
1.2	MARKET DEFINITION	40
1.3	STUDY SCOPE	41
1.3.1	MARKET SEGMENTATION & REGIONAL SCOPE	41
1.3.2	INCLUSIONS & EXCLUSIONS	42
1.3.3	YEARS CONSIDERED	43
1.3.4	CURRENCY CONSIDERED	43
1.4	STAKEHOLDERS	43
1.5	SUMMARY OF CHANGES	44
2	RESEARCH METHODOLOGY	45
2.1	RESEARCH DATA	45
2.1.1	SECONDARY DATA	46
2.1.1.1	Key sources of secondary data	46
2.1.1.2	Key objectives of secondary research	46
2.1.2	PRIMARY DATA	47
2.1.2.1	Breakdown of primaries	47
2.1.2.2	Key objectives of primary research	47
2.2	MARKET ESTIMATION METHODOLOGY	48

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.2.1	GLOBAL MARKET SIZE ESTIMATION	48
2.2.2	SEGMENTAL MARKET ASSESSMENT (TOP-DOWN APPROACH)	51
2.3	MARKET GROWTH RATE FORECAST	53
2.4	DATA TRIANGULATION	55
2.5	STUDY ASSUMPTIONS	56
2.6	RESEARCH LIMITATIONS	56
2.7	RISK ANALYSIS	57
3	EXECUTIVE SUMMARY	58
4	PREMIUM INSIGHTS	63
4.1	IN SITU HYBRIDIZATION MARKET OVERVIEW	63
4.2	NORTH AMERICA: IN SITU HYBRIDIZATION MARKET, BY OFFERING AND COUNTRY	64
4.3	IN SITU HYBRIDIZATION MARKET SHARE, BY END USER, 2024	65
4.4	IN SITU HYBRIDIZATION MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES	66
?		
5	MARKET OVERVIEW	67
5.1	INTRODUCTION	67
5.2	MARKET DYNAMICS	67
5.2.1	DRIVERS	68
5.2.1.1	Technological innovations for advanced in situ hybridization capabilities	68
5.2.1.2	Increasing adoption of in situ hybridization in precision medicines and laboratory-developed tests	69
5.2.1.3	Rising demand for spatial transcriptomics in cancer and neuroscience research	70
5.2.2	RESTRAINTS	70
5.2.2.1	Competition from alternative molecular diagnostic techniques	70
5.2.2.2	High cost of in situ hybridization techniques in research and clinical applications	70
5.2.3	OPPORTUNITIES	71
5.2.3.1	Advantages of in situ hybridization over competing technologies	71
5.2.3.2	Rising adoption of companion diagnostic solutions	71
5.2.3.3	High growth opportunities in emerging economies	72
5.2.4	CHALLENGES	72
5.2.4.1	Technical complexities associated with in situ hybridization	72
5.3	TRENDS/DISRUPTIONS IMPACTING CUSTOMER'S BUSINESS	73
5.4	VALUE CHAIN ANALYSIS	73
5.5	ECOSYSTEM ANALYSIS	75
5.5.1	ROLE IN ECOSYSTEM	76
5.6	TECHNOLOGY ANALYSIS	78
5.6.1	KEY TECHNOLOGIES	78
5.6.1.1	Fluorescence In Situ Hybridization (FISH)	78
5.6.1.2	Chromogenic In Situ Hybridization (CISH)	78
5.6.1.3	RNAscope	78
5.6.2	COMPLEMENTARY TECHNOLOGIES	79
5.6.2.1	Immunofluorescence (IF)	79
5.6.2.2	Next-generation Sequencing (NGS)	79
5.6.3	ADJACENT TECHNOLOGIES	79
5.6.3.1	Immunohistochemistry (IHC)	79
5.7	PATENT ANALYSIS	80
5.7.1	TOP APPLICANTS/OWNERS (COMPANIES) FOR IN SITU HYBRIDIZATION PATENTS	80
5.7.2	LIST OF KEY PATENTS	81

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

5.8	KEY CONFERENCES & EVENTS, 2025-2026	82
5.9	PORTER'S FIVE FORCES ANALYSIS	83
5.9.1	INTENSITY OF COMPETITIVE RIVALRY	84
5.9.2	THREAT OF SUBSTITUTES	85
5.9.3	BARGAINING POWER OF BUYERS	85
5.9.4	BARGAINING POWER OF SUPPLIERS	85
5.9.5	THREAT OF NEW ENTRANTS	85
5.10	KEY STAKEHOLDERS & BUYING CRITERIA	86
5.10.1	KEY STAKEHOLDERS IN BUYING PROCESS	86
5.10.2	KEY BUYING CRITERIA	87
5.11	PRICING ANALYSIS	89
5.11.1	AVERAGE SELLING PRICE TREND OF IN SITU HYBRIDIZATION PRODUCTS, BY KEY PLAYER, 2022-2024	89
5.11.2	AVERAGE SELLING PRICE TREND OF IN SITU HYBRIDIZATION CONSUMABLES, BY REGION, 2022-2024	91
5.12	INVESTMENT & FUNDING SCENARIO	91
5.13	REGULATORY LANDSCAPE	92
5.13.1	REGULATORY FRAMEWORK	92
5.13.1.1	North America	92
5.13.1.2	Europe	92
5.13.1.3	Asia Pacific	93
5.13.2	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	93
5.14	IMPACT OF AI/GEN AI ON IN SITU HYBRIDIZATION MARKET	95
5.14.1	KEY USE CASES	95
5.14.2	IMPACT OF AI ON IN SITU HYBRIDIZATION ECOSYSTEM	96
5.14.3	FUTURE OF AI IN IN SITU HYBRIDIZATION ECOSYSTEM	97
5.15	IMPACT OF 2025 US TARIFF ON IN SITU HYBRIDIZATION MARKET	97
5.15.1	INTRODUCTION	97
5.15.2	KEY TARIFF RATES	98
5.15.3	PRICE IMPACT ANALYSIS	100
5.15.4	IMPACT ON COUNTRY/REGION	100
5.15.4.1	North America	100
5.15.4.1.1	US	100
5.15.4.2	Europe	101
5.15.4.3	Asia Pacific	101
5.15.5	IMPACT ON END-USE INDUSTRIES	102
5.15.5.1	Hospitals & diagnostic laboratories	102
5.15.5.2	Academic & research institutes	103
5.15.5.3	Pharmaceutical & biotechnology companies	103
5.15.5.4	Contract research organizations	103
6	IN SITU HYBRIDIZATION MARKET, BY OFFERING	104
6.1	INTRODUCTION	105
6.2	CONSUMABLES	105
6.2.1	KITS & REAGENTS	109
6.2.1.1	Increasing demand for companion diagnostics and personalized medicines to support market growth	109
6.2.2	PROBE & PROBE KITS	113
6.2.2.1	Technological advancements in probe design and chemistry to propel market growth	113
6.2.3	ACCESSORIES & OTHER CONSUMABLES	117

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.2.3.1	Growing adoption of in situ hybridization in research and clinical diagnostics to aid market growth	117
6.3	INSTRUMENTS	120
6.3.1	AUTOMATED IN SITU HYBRIDIZATION INSTRUMENTS	123
6.3.1.1	Increased adoption of faster and more reliable automated systems to boost market growth	123
6.3.2	MANUAL IN SITU HYBRIDIZATION INSTRUMENTS	127
6.3.2.1	Persistent demand in emerging economies to maintain market growth	127
6.4	SOFTWARE	130
6.4.1	INTEGRATION OF ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING IN SOFTWARE TO SUPPORT GROWTH	130
6.5	SERVICES	134
6.5.1	DATA INTERPRETATION SERVICES	137
6.5.1.1	Increasing use of multiplex assays and spatial biology techniques to boost segment growth	137
6.5.2	CUSTOM PROBE DESIGN SERVICES	141
6.5.2.1	Rising demand for customized probes in research and drug development to favor market growth	141
7	IN SITU HYBRIDIZATION MARKET, BY TECHNOLOGY	145
7.1	INTRODUCTION	146
7.2	FLUORESCENCE IN SITU HYBRIDIZATION (FISH)	146
7.2.1	DNA FLUORESCENCE IN SITU HYBRIDIZATION (DNA-FISH)	150
7.2.1.1	Extensive use in research and companion diagnostics to fuel segment growth	150
7.2.2	RNA FLUORESCENCE IN SITU HYBRIDIZATION (RNA-FISH)	154
7.2.2.1	Rise in biomedical research activity to drive adoption of RNA-FISH technology	154
7.2.3	PNA FLUORESCENCE IN SITU HYBRIDIZATION (PNA-FISH)	157
7.2.3.1	High sensitivity offered by PNA FISH to fuel precise and reliable detection at low probe concentrations	157
7.3	CHROMOGENIC IN SITU HYBRIDIZATION (CISH)	161
7.3.1	COST-EFFECTIVENESS, PRESERVATION OF TISSUE MORPHOLOGY, AND EASE OF INTERPRETATION TO BOOST SEGMENT GROWTH	161
8	IN SITU HYBRIDIZATION MARKET, BY APPLICATION	165
8.1	INTRODUCTION	166
8.2	CLINICAL DIAGNOSTIC APPLICATIONS	166
8.2.1	CANCER DIAGNOSTICS	170
8.2.1.1	Rising number of cancer cases and increasing focus on precision medicines to drive segment	170
8.2.2	INFECTIOUS DISEASE DIAGNOSTICS	174
8.2.2.1	Growing demand for high sensitivity and specificity diagnostic methods in resource-limited settings to spur market growth	174
8.2.3	GENETIC DISEASE DIAGNOSTICS	177
8.2.3.1	Rising adoption of prenatal and neonatal screening to propel segment growth	177
8.2.4	OTHER CLINICAL DIAGNOSTIC APPLICATIONS	181
8.3	RESEARCH APPLICATIONS	184
8.3.1	NEUROSCIENCE RESEARCH	187
8.3.1.1	Growing focus on neurological research to increase R&D in neuroscience-based ISH technologies	187
8.3.2	IMMUNOLOGY RESEARCH	191
8.3.2.1	Rising prevalence of autoimmune diseases to support market growth	191
8.3.3	OTHER RESEARCH APPLICATIONS	194
8.4	DRUG DISCOVERY & DEVELOPMENT	198
8.4.1	RISING DEMAND FOR NUCLEIC ACID-BASED THERAPIES TO FAVOR MARKET GROWTH	198
9	IN SITU HYBRIDIZATION MARKET, BY END USER	202
9.1	INTRODUCTION	203
9.2	HOSPITALS & DIAGNOSTIC LABORATORIES	203

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

9.2.1 RISING DEMAND FOR MOLECULAR TESTS AND INCREASING NEED FOR ACCURATE DISEASE DIAGNOSIS TO DRIVE MARKET 203

9.3 ACADEMIC & RESEARCH INSTITUTES 207

9.3.1 INCREASING GOVERNMENT AND PRIVATE FUNDING FOR LIFE SCIENCE AND BIOMEDICAL RESEARCH TO FUEL MARKET GROWTH 207

9.4 PHARMACEUTICAL & BIOTECHNOLOGY COMPANIES 210

9.4.1 INCREASING FOCUS ON DEVELOPING PRECISION TREATMENTS TO PROPEL MARKET GROWTH 210

9.5 CONTRACT RESEARCH ORGANIZATIONS 213

9.5.1 INCREASING OUTSOURCING OF RESEARCH ACTIVITIES IN TISSUE DIAGNOSTICS TO SUPPORT MARKET GROWTH 213

10 IN SITU HYBRIDIZATION MARKET, BY REGION 217

10.1 INTRODUCTION 218

10.2 NORTH AMERICA 218

10.2.1 MACROECONOMIC ANALYSIS FOR NORTH AMERICA 219

10.2.2 US 225

10.2.2.1 US to dominate North American in situ hybridization market during study period 225

10.2.3 CANADA 230

10.2.3.1 Increasing cancer burden and expanding in situ hybridization applications in cancer research to propel market growth 230

?

10.3 EUROPE 235

10.3.1 MACROECONOMIC ANALYSIS FOR EUROPE 235

10.3.2 GERMANY 241

10.3.2.1 Research advancements and corporate developments to fuel market growth 241

10.3.3 UK 246

10.3.3.1 High government healthcare investments in genomic research to support market growth 246

10.3.4 FRANCE 250

10.3.4.1 Rising government investment in pharmaceutical industry to propel market growth 250

10.3.5 ITALY 255

10.3.5.1 High R&D investments and advanced pharmaceutical industry to favor market growth 255

10.3.6 SPAIN 260

10.3.6.1 Growing focus on cancer biomarker development to aid market growth 260

10.3.7 REST OF EUROPE 264

10.4 ASIA PACIFIC 269

10.4.1 MACROECONOMIC ANALYSIS FOR ASIA PACIFIC 270

10.4.2 CHINA 276

10.4.2.1 Increased focus on precision medicine and local manufacturing of in situ hybridization technologies to spur market growth 276

10.4.3 JAPAN 280

10.4.3.1 Stringent regulatory guidelines and large geriatric population to augment market growth 280

10.4.4 INDIA 285

10.4.4.1 Rising awareness of cancer and genetic disorders to support market growth 285

10.4.5 AUSTRALIA 290

10.4.5.1 Robust government support and active genetic research to propel market growth 290

10.4.6 SOUTH KOREA 295

10.4.6.1 Increased focus on genomic and diagnostic research to aid market adoption of in situ hybridization products 295

10.4.7 REST OF ASIA PACIFIC 300

10.5 LATIN AMERICA 305

10.5.1 MACROECONOMIC ANALYSIS FOR LATIN AMERICA 305

10.5.2 BRAZIL 311

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.5.2.1	Growing focus on precision diagnostics to drive market	311
10.5.3	MEXICO	316
10.5.3.1	Increasing collaboration among key players to spur market growth	316
10.5.4	REST OF LATIN AMERICA	320
	?	
10.6	MIDDLE EAST	325
10.6.1	MACROECONOMIC ANALYSIS FOR MIDDLE EAST	325
10.6.2	GCC COUNTRIES	331
10.6.2.1	Kingdom of Saudi Arabia	335
10.6.2.1.1	Expanding role of in situ hybridization products in research and clinical practice to boost market growth	335
10.6.2.2	UAE	340
10.6.2.2.1	Rising government support and incorporation of in situ hybridization technologies by hospitals to aid market growth	340
10.6.3	REST OF GCC COUNTRIES	345
10.6.4	REST OF MIDDLE EAST	350
10.7	AFRICA	355
10.7.1	GROWING DEMAND FOR GENOMICS INFRASTRUCTURE AND MOLECULAR DIAGNOSTICS TO PROPEL MARKET GROWTH	355
10.7.2	MACROECONOMIC ANALYSIS FOR AFRICA	355
11	COMPETITIVE LANDSCAPE	361
11.1	INTRODUCTION	361
11.2	KEY PLAYERS STRATEGIES/RIGHT TO WIN	361
11.2.1	OVERVIEW OF STRATEGIES ADOPTED BY KEY PLAYERS IN IN SITU HYBRIDIZATION MARKET	361
11.3	REVENUE ANALYSIS, 2020-2024	363
11.4	MARKET SHARE ANALYSIS, 2024	364
11.5	COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024	367
11.5.1	STARS	367
11.5.2	EMERGING LEADERS	367
11.5.3	PERVASIVE PLAYERS	367
11.5.4	PARTICIPANTS	367
11.5.5	COMPANY FOOTPRINT: KEY PLAYERS, 2024	369
11.5.5.1	Company footprint	369
11.5.5.2	Region Footprint	370
11.5.5.3	Offering footprint	371
11.5.5.4	Technology footprint	372
11.6	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024	373
11.6.1	PROGRESSIVE COMPANIES	373
11.6.2	RESPONSIVE COMPANIES	373
11.6.3	DYNAMIC COMPANIES	373
11.6.4	STARTING BLOCKS	373
11.6.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024	375
11.6.5.1	Detailed list of key startups/SMEs	375
11.6.5.2	Competitive benchmarking of key startups/SMEs	376
	?	
11.7	COMPANY VALUATION & FINANCIAL METRICS	377
11.7.1	FINANCIAL METRICS	377
11.7.2	COMPANY VALUATION	377
11.8	BRAND/PRODUCT COMPARISON	378
11.9	COMPETITIVE SCENARIO	379

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11.9.1	PRODUCT LAUNCHES & APPROVALS	379
11.9.2	DEALS	380
12	COMPANY PROFILES	381
12.1	KEY PLAYERS	381
12.1.1	F. HOFFMANN-LA ROCHE LTD.	381
12.1.1.1	Business overview	381
12.1.1.2	Products/Services/Solutions offered	382
12.1.1.3	Recent developments	384
12.1.1.3.1	Product launches & approvals	384
12.1.1.4	MnM view	385
12.1.1.4.1	Right to win	385
12.1.1.4.2	Strategic choices	385
12.1.1.4.3	Weaknesses & competitive threats	385
12.1.2	DANAHER	386
12.1.2.1	Business overview	386
12.1.2.2	Products/Services/Solutions offered	387
12.1.2.3	Recent developments	389
12.1.2.3.1	Product launches	389
12.1.2.3.2	Deals	390
12.1.2.4	MnM view	390
12.1.2.4.1	Right to win	390
12.1.2.4.2	Strategic choices	391
12.1.2.4.3	Weaknesses & competitive threats	391
12.1.3	ABBOTT	392
12.1.3.1	Business overview	392
12.1.3.2	Products/Services/Solutions offered	393
12.1.3.3	MnM view	398
12.1.3.3.1	Right to win	398
12.1.3.3.2	Strategic choices	398
12.1.3.3.3	Weaknesses & competitive threats	398
12.1.4	THERMO FISHER SCIENTIFIC INC.	399
12.1.4.1	Business overview	399
12.1.4.2	Products/Services/Solutions offered	400
12.1.4.3	MnM view	401
12.1.4.3.1	Right to win	401
12.1.4.3.2	Strategic choices	401
12.1.4.3.3	Weaknesses & competitive threats	401
12.1.5	BIO-TECHNE	402
12.1.5.1	Business overview	402
12.1.5.2	Products/Services/Solutions offered	403
12.1.5.3	Recent developments	405
12.1.5.3.1	Product launches	405
12.1.5.3.2	Deals	406
12.1.5.4	MnM view	406
12.1.5.4.1	Right to win	406
12.1.5.4.2	Strategic choices	406
12.1.5.4.3	Weaknesses & competitive threats	407

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 12.1.6 □AGILENT TECHNOLOGIES, INC. □408
 - 12.1.6.1 □Business overview □408
 - 12.1.6.2 □Products/Services/Solutions offered □409
- 12.1.7 □QIAGEN □412
 - 12.1.7.1 □Business overview □412
 - 12.1.7.2 □Products/Services/Solutions offered □414
- 12.1.8 □BIOCARE MEDICAL, LLC □415
 - 12.1.8.1 □Business overview □415
 - 12.1.8.2 □Products/Services/Solutions offered □415
 - 12.1.8.3 □Recent developments □419
 - 12.1.8.3.1 □Deals □419
- 12.1.9 □BIOVIEW □421
 - 12.1.9.1 □Business overview □421
 - 12.1.9.2 □Products/Services/Solutions offered □421
- 12.1.10 □CREATIVE BIOARRAY □422
 - 12.1.10.1 □Business overview □422
 - 12.1.10.2 □Products/Services/Solutions offered □422
- 12.1.11 □ABNOVA CORPORATION □425
 - 12.1.11.1 □Business overview □425
 - 12.1.11.2 □Products/Services/Solutions offered □425
- 12.1.12 □ZYTOMICS □427
 - 12.1.12.1 □Business overview □427
 - 12.1.12.2 □Products/Services/Solutions offered □427
- 12.1.13 □ENZO BIOCHEM INC. □431
 - 12.1.13.1 □Business overview □431
 - 12.1.13.2 □Products/Services/Solutions offered □432
 - 12.1.13.3 □Recent developments □434
 - 12.1.13.3.1 □Product launches □434
- ?
- 12.1.14 □CYTOTEST INC. □435
 - 12.1.14.1 □Business overview □435
 - 12.1.14.2 □Products/Services/Solutions offered □435
- 12.1.15 □GENEMED BIOTECHNOLOGIES, INC. □438
 - 12.1.15.1 □Business overview □438
 - 12.1.15.2 □Products/Services/Solutions offered □438
- 12.2 □OTHER PLAYERS □440
 - 12.2.1 □MOLECULAR INSTRUMENTS, INC. □440
 - 12.2.2 □OXFORD GENE TECHNOLOGY IP LIMITED □441
 - 12.2.3 □HISTO-LINE LABORATORIES □442
 - 12.2.4 □METASYSTEMS □443
 - 12.2.5 □BIOGENEX □445
 - 12.2.6 □LGC BIOSEARCH TECHNOLOGIES □446
 - 12.2.7 □BIODISCOVERY LLC □447
 - 12.2.8 □KANEKA EUROGENTEC S.A. □448
 - 12.2.9 □LIFE TECHNOLOGIES (INDIA) PVT. LTD. □449
 - 12.2.10 □GENECOPOEIA, INC. □450
- 13 □APPENDIX □452

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.1 DISCUSSION GUIDE 452

13.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL 456

13.3 CUSTOMIZATION OPTIONS 458

13.4 RELATED REPORTS 458

13.5 AUTHOR DETAILS 459

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**In Situ Hybridization Market by Offering (Consumables, Instruments, Software),
Technology (FISH (DNA FISH, RNA, PNA), CISH), Application (Cancer Diagnostics,
Research, Discovery), End User (Hospitals, Pharma & Biotech, Academia) - Global
Forecast to 2030**

Market Report | 2025-07-08 | 460 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

Zip Code*

Country*

Date

Signature