PCR in Screening and Diagnostics: Market Developments, Growth Areas and Opportunities 2013

Description: This market analysis was carried out to provide business information to developers, manufacturers and suppliers in the PCR clinical and diagnostics field.

Its findings include:

- Marketing and sales opportunities
- End-user purchasing decisions
- Market growth and shrinkage
- Innovation and new product opportunities

Market Analysis and Opportunities

A competitive market analysis of current practices and future developments across 25 key market areas in the PCR screening and diagnostics field.

Examples include

- PCR Techniques: Which PCR screening and diagnostics techniques are the market leaders and what changes do end-users predict over the next three years. Which PCR clinical and diagnostics techniques are growing and which are declining?
- PCR Applications: Which PCR screening and diagnostics applications are the market leaders and what changes do end-users predict over the next three years. Which PCR clinical and diagnostics applications are growing and which are reducing?
- Suppliers: Who are the major company suppliers in the PCR screening and diagnostics field and who do PCR clinical and diagnostics end-users plan to purchase from over the next three years. Who are the top ten suppliers in this field, and what changes are predicted over the next three years.
- Opportunities: The findings of this study are analysed to identify opportunities to suppliers in the PCR screening and diagnostics field, in the 'Market Areas' indicated below.

This study was conducted through specialist groups of experienced clinical and laboratory PCR end-users and its findings are therefore based on 'real world' market data.

PCR is used in a wide variety of molecular biology applications, including sequencing, genetic fingerprinting, cloning, disease research, diagnostics, drug discovery, disease bio-markers and forensics. Today, this technique continues to grow and some estimates suggest that by 2015 global markets for this technique will exceed $27 billion. Biopharm Reports has carried out a market study of the use of PCR in screening and diagnostics, involving the participation of 173 end-users and decision-makers in more than 50 countries. This study was carried out to investigate market developments, and to identify new insights and opportunities to developers and vendors in this field.

This study focused in particular on current and future techniques and applications, end-users' plans for using PCR in screening and diagnostics over the next three years, as well as preferred products, purchasing and new developments. Other market areas included new and emerging applications, end-users' principal PCR systems and their strengths and weaknesses, current and future budgets, budget breakdown, consumables, challenges, innovation, software and sample preparation.

Overview

- Current PCR techniques: Current use of more than 40 PCR techniques in screening or diagnostics by end-users, each ranked according to their competitive position. PCR techniques considered include Allele Specific PCR, Arbitrarily Primed PCR (APPCR), Assembly PCR (Polymerase Cycling Assembly, PCA), Asymmetric PCR (A PCR), Bead Emulsion Amplification PCR (BEA), Classical PCR, Colony PCR, Degenerate Oligonucleotide PCR (DOPPCR), Digital PCR (dPCR), Helicase Dependent Amplification (HDA), Hot start PCR, Hyper PCR, Immunocapture PCR, In Silico PCR, Inter Sequence Specific PCR (ISSR), Inverse PCR, Ligation Mediated PCR,
Long PCR, Loop Mediated Isothermal Amplification (LAMP), Methylation Specific PCR (MSP), Miniprimer PCR, Multiplex Ligation Dependent Probe Amplification (MLPA), Multiplex PCR, Nested PCR, Overlap Extension PCR (Splicing by overlap extension, SOE), PANAC (Single Reaction Real Time PCR), PCR array, PCR Denaturing Gradient Gel Electrophoresis (PCR DGGE), PCR Restriction Fragment Length Polymorphism (PCR RFLP), Quantitative PCR (qPCR), Random Amplified Polymorphic DNA (RAPD), Rapid Amplification of cDNA ENDS PCR (RACE PCR), Reverse Transcription PCR (RT PCR), Single Molecule PCR, Single Specific Primer Polymerase, Chain Reaction (SSPPCR), Solid Phase PCR, Stem loop RT PCR, Stepdown PCR, Taqman, Temporal Temperature Gradient Gel Electrophoresis (PCTTGE), Thermal Asymmetric Interlaced PCR (TAILPCR), Touchdown PCR, Universal Fast Walking or other.

- Future PCR techniques: Future anticipated use of more than 40 PCR techniques in screening or diagnostics by end-users over the next three years, each ranked according to their competitive position. PCR techniques considered include Allele Specific PCR, Arbitrarily Primed PCR (APPCR), Assembly PCR (Polymerase Cycling Assembly, PCA), Asymmetric PCR (A PCR), Bead Emulsion Amplification PCR (BEA), Classical PCR, Colony PCR, Degenerate Oligonucleotide PCR (DOPPCR), Digital PCR (dPCR), Helicase Dependent Amplification (HDA), Hot start PCR, Hyper PCR, Immunocapture PCR, In Silico PCR, Inter Sequence Specific PCR (ISSR), Inverse PCR, Ligation Mediated PCR, Long PCR, Loop Mediated Isothermal Amplification (LAMP), Methylation Specific PCR (MSP), Miniprimer PCR, Multiplex Ligation Dependent Probe Amplification (MLPA), Multiplex PCR, Nested PCR, Overlap Extension PCR (Splicing by overlap extension, SOE), PANAC (Single Reaction Real Time PCR), PCR array, PCR Denaturing Gradient Gel Electrophoresis (PCR DGGE), PCR Restriction Fragment Length Polymorphism (PCR RFLP), Quantitative PCR (qPCR), Random Amplified Polymorphic DNA (RAPD), Rapid Amplification of cDNA ENDS PCR (RACE PCR), Reverse Transcription PCR (RT PCR), Single Molecule PCR, Single Specific Primer Polymerase, Chain Reaction (SSPPCR), Solid Phase PCR, Stem loop RT PCR, Stepdown PCR, Taqman, Temporal Temperature Gradient Gel Electrophoresis (PCTTGE), Thermal Asymmetric Interlaced PCR (TAILPCR), Touchdown PCR, Universal Fast Walking or other.

- Current PCR applications: Current use of 15 PCR applications in screening or diagnostics by end-users, each ranked according to their competitive position. Application considered were allele size detection for human ID STR typing, bacterial tipification (REPPCR), cell-free DNA mutations, cloning, commensal bacteria detection / quantification, community profiling, detection of antimicrobial resistance genes, detection of specific microbial 16S rRNA genes, diagnostics, drug treatment dosage prediction, drug treatment type prediction, fungal species detection, gene expression (mRNA), gene mutations and alterations, generating genetic probes, genetic mapping, genetic material amplification, sequencing, haplotypes, immunocapture PCR mediated virion detection, microbial populations, MicroRNA quantification, pathogen detection/identification, quantitative analysis of gene abundance, site-directed mutagenesis, tissue typing or other.

- Future PCR applications: Application considered were allele size detection for human ID STR typing, bacterial tipification (REPPCR), cell-free DNA mutations, cloning, commensal bacteria detection / quantification, community profiling, detection of antimicrobial resistance genes, detection of specific microbial 16S rRNA genes, diagnostics, drug treatment dosage prediction, drug treatment type prediction, fungal species detection, gene expression (mRNA), gene mutations and alterations, generating genetic probes, genetic mapping, genetic material amplification, sequencing, haplotypes, immunocapture PCR mediated virion detection, microbial populations, MicroRNA quantification, pathogen detection/identification, quantitative analysis of gene abundance, site-directed mutagenesis, tissue typing or other.

- Biomarker identity: The identities of the main biomarkers investigated using PCR.

- Biomarker types: The main biomarker types investigated using PCR, including gene variations (mutations/polymorphisms), DNA methylation, gene copy number, gene expression, SNPs, mRNA, MicroRNA, alternative spliced variants or other.

- Biomarker utility: The main clinical utilities of biomarkers investigated using PCR, including disease prognosis, disease susceptibility or risk, disease stage or severity, drug type therapy decision-making, drug type therapy dose, drug discovery, early detection of disease, clinical trial endpoint, guiding treatment, response to therapy, safety or toxicity factors or other areas.

Future company suppliers: End-user's anticipated preferred company suppliers for their PCR over the next three years, including Abbott, Agilent, Applied Biosystems, Becton Dickinson, Bioline, Biometra, Biorad, Biotium, Biozyme, Cepheid, Eppendorf, ESCO, Euroclone, Eurogentec, Fermentas, Finzymes, Fluidigm, GE Healthcare, Genework, Hain Life sciences, Idaho, Integrated Data Technologies, Invitrogen, Kapa Biosystems, Life Technologies, Luminex, Machery Nagel, MJ Research, New England BioLabs, Perkin Elmer, Promega, Qiagen, Quanta Bioscience, Roche, SensoQuest, Siemens, Sigma Genosys, Stratagene, Takara, Thermofisher or others.

Preferred instrument: End-users preferred PCR instrument (from their preferred supplier) in the PCR field.

Strengths: The strengths of end-user's preferred instrument in the PCR field (how is it meeting their needs in this area).

Weaknesses: The weaknesses of end-users preferred instrument in the PCR field (how is it failing to meet their needs in this area).

Bioinformatics software: End-users preferred bioinformatics software in the PCR field.

Required innovations: End-user's views (rated on a scale of 1-10) on the PCR areas where innovations is most required. Innovation areas considered were sample preparation, ancillary techniques, PCR (qualitative) selectivity, PCR (quantitative) sensitivity, PCR reproducibility, PCR qualitative/quantitative capability, PCR robustness (ruggedness), detection methods, automation, speed or sample throughput, specialist data control systems, specialist bioinformatics systems or other.

Samples: End-user's main samples analysed using PCR, including animal tissues, cell isolates, cells cerebrospinal fluid, genetic material, human tissues, In-vitro biological solutions, microbiological materials, plasma, saliva, serum, urine, whole blood or other.

Sample preparation: End-user's preferred sample preparation technique.

Recent Innovation: End-user's views on the most important PCR innovations in their field over the last three years.

Financial Budget: End-user's annual financial budgets relating to their use of PCR in screening and diagnostics.

Cost per sample: End-users average costs per sample, using PCR in screening and diagnostics.

Current Budget breakdown: End user’s current budget breakdown for the use of PCR in screening and diagnostics, relating to reagents and consumables, system control (data handling) software, data analysis (offline) software, PCR instruments, sample preparation and related instrumentation, ancillary systems/instrumentation, general overheads, instrument servicing/repair, staff salaries and other areas.

Future Budget breakdown: End user's anticipated future budget breakdown for the use of PCR in screening and diagnostics, relating to reagents and consumables, system control (data handling) software, data analysis (offline) software, PCR instruments, sample preparation and related instrumentation, ancillary systems/instrumentation, general overheads, instrument servicing/repair, staff salaries and other areas.

Overall budget: End-user's estimates of by how much they anticipate their overall annual financial budget for the use of PCR in screening and diagnostics will change, either increase or decrease, over the next three years.

Consumables: End-users top three consumables in terms of overall costs, that are directly associated with their PCR work in screening and diagnostics.

PCR activities: End-user's PCR activities in screening and diagnostics, relating to the running of routine PCR tests for clinical decision-making, the development or validation of PCR tests and the qualitative discovery of disease biomarkers using PCR.

Organisation types: Organisation types in this study included universities, research Institutes, small companies, medium sized companies, large international company, clinics, hospitals, government
organisations, veterinary organisation and others.

- Fields: Fields types of participants in this study included biotechnology, clinical, hospital, government, healthcare, pharmaceuticals, research institute, university or other.

- Therapeutic Areas: End-users' DNA sequencing activities in terms of their general therapeutic area, including arthritis, autoimmune diseases, bone metabolism, cancer, cardiovascular, central nervous system, endocrine, gastrointestinal, genito-urinary system, haematology, infections, inflammation, metabolic disorders, musculoskeletal disorders, nutrition, obstetrics and gynaecology, ophthalmology, pain, respiratory, skin or other.

- Purpose: End-users' underlying reasons for using PCR in screening or diagnostics across 12 areas, namely clinical research, routine diagnostics, routine screening, clinical trials, treatment decisions, treatment monitoring, diagnostics research, disease research, drug R&D, drug targets, pathology, toxicology or other.

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