



Deep Dive

QIAcuity digital PCR

Addressing the growing digital PCR opportunity

June 15, 2026

Accelerating digital PCR adoption for future growth

- > **Proven** by a global installed base of more than 3,200 QIAcuity instruments
- > **Purpose-built** for low- to high-throughput labs, with ~20% higher-throughput placements
- > **Progressing** into gene expression and high-multiplex applications
- > **Positioned** for pharma partnerships and CDx development

QIAcuity digital PCR - Why we win



Ease of use

Leveraging qPCR-like usability with overall run time <2 hours



Throughput flexibility

Addressing customer throughput needs with >1,500 samples per day⁽¹⁾



Gene expression expansion

Enabling broader applications through multiplexing



Breadth of applications

Supporting Life Sciences, translational and clinical customers

\$89 mn
2025 net sales

~\$100 mn
2026 net sales
CER target

1) Using the QIAcuity Eight instrument

CER – Constant exchange rates

Bridging the significant opportunity between qPCR and NGS

Quantitative PCR (qPCR)

QIAcuity dPCR
Making dPCR more accessible

Next-generation sequencing (NGS)

— Lower accuracy and precision

High sensitivity and precision
More accurate than qPCR

+ In-depth insights and high precision

+ Fast time-to-result at low cost

Rapid and cost-effective
Faster and lower cost than NGS

— Slow time-to-result at high cost

~\$2.7 bn
qPCR
2025 TAM⁽¹⁾

~\$0.6 bn
dPCR
2025 TAM⁽¹⁾

~\$1.9 bn
NGS consumables
2025 TAM⁽¹⁾

1) Total addressable market incl. research and clinical customer segments (QIAGEN market estimates) | TAM – Total addressable market

Building on more than 3,200 QIAcuity placements



QIAcuity One

Target group

Academia

Challenges addressed

✓ Overcoming entry barriers

QIAcuity Four

Translational and cancer research

✓ Exploring use of dPCR vs. NGS

QIAcuity Eight

Biopharma

✓ Precision and speed benefits

QIAcuityDx

Clinical labs and hospitals

✓ Validated for diagnostics

Gene expression: Growing opportunity for QIAcuity

A large and growing market

~\$2.7 bn⁽¹⁾

Gene expression accounts for most qPCR use cases

1) qPCR addressable market in 2025

QIAcuity dPCR: Expanding beyond qPCR limitations



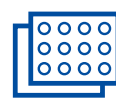
As easy as qPCR



As fast as qPCR



Accurate and precise



More targets at once



Highly reproducible

Expanding portfolio



QIAcuity assays – Gene expression

Ready-to-use multiplex dPCR assays for human, mouse and rat



QIAcuity OneStep High Multiplex Mix

New chemistry enabling analysis of up to 12 targets per reaction

CDx across the full workflow

Sample technologies



QIASymphony



EZ2



QIAcube

Detection



NGS



QIAcuity dPCR



QIAstat-Dx

3 Pharma partnerships with QIAcuityDx digital PCR

>30 Master collaboration agreements

Analysis



QDI

15 FDA approvals

CDx – Companion Diagnostics | QDI – QIAGEN Digital Insights