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Proteomics Market - A Global and Regional Analysis: Focus on Offerings, Application, End User, and Region - Analysis and Forecast, 2024-2034

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Abstracts

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This report will be delivered in 7-10 working days.Introduction to Proteomics Market

The global proteomics market is projected to reach $109.71 billion by 2034 from $33.92 billion in 2024, growing at a CAGR of 12.46% during the forecast period 2024-2034. Key factors driving this growth include technological advancements in mass spectrometry and next-generation sequencing, which improve the accuracy of proteomics analysis.

The rising demand for personalized medicine, particularly for biomarker discovery and disease profiling, is another major driver. Additionally, increased research funding, strategic collaborations, and the need for early disease detection and effective diagnostics further support market expansion. With an aging population and a higher prevalence of chronic diseases, the demand for proteomics in healthcare and research is expected to continue to rise, ensuring the market's sustained growth.

Market Introduction

The global proteomics market consists of several key segments, including technologies and tools such as mass spectrometry, protein microarrays, and next-generation sequencing, which are essential for protein analysis. Applications span across drug discovery, biomarker identification, disease diagnostics, and personalized medicine, all of which benefit from proteomics insights. Reagents and consumables, including kits

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and chemicals, support the research and experimental needs of the industry. End users include academic and research institutes, pharmaceutical and biotechnology companies, hospitals, and diagnostic labs, all leveraging proteomics for research, development, and clinical applications. Geographically, the market is expanding in regions such as North America, Europe, Asia-Pacific, Latin America, the Middle East, and Africa, with Asia-Pacific experiencing rapid growth due to increasing investments in healthcare and biotechnology. Together, these elements drive the continued evolution and growth of the proteomics market globally.

Impact Analysis:

The proteomics market has made an impact in the following ways:

Advancement of Disease Understanding: Proteomics has greatly improved our understanding of the molecular mechanisms behind various diseases, including cancer, cardiovascular diseases, and neurological disorders. By identifying proteins that play critical roles in disease progression, proteomics enables more targeted and effective research.

Biomarker Discovery for Diagnostics: Proteomics has facilitated the discovery of novel biomarkers for early detection, diagnosis, and prognosis of diseases. This has led to more precise and non-invasive diagnostic methods, improving patient outcomes through early intervention.

Personalized Medicine: The application of proteomics has been instrumental in the development of personalized medicine. By analyzing protein profiles, treatments can be tailored to the specific needs of individual patients, ensuring more effective therapies with fewer side effects.

Drug Development and Target Identification: In drug discovery, proteomics helps in identifying new drug targets by studying the interactions between proteins and potential therapeutic compounds. This accelerates the development of new drugs and treatments, particularly in the oncology and autoimmune sectors.

Improvement in Clinical Applications: Proteomics has enhanced clinical applications by enabling better disease monitoring, therapeutic efficacy assessments, and treatment planning. It has become an integral part of clinical research and the development of diagnostic platforms.

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Technological Innovation: The demand for proteomics has driven significant advancements in analytical technologies, such as mass spectrometry and protein arrays. These innovations not only benefit proteomics research but also spill over into other scientific fields, creating broader technological impacts.

Market Segmentation:

Segmentation 1: by Offering

Product

Service

Product Segment to Continue Dominating the Proteomics Market (by Offering)

Based on offering, the proteomics market is led by product, which held a 72.53% share in 2022.

Segmentation 2: by Application

Drug Discovery

Clinical Diagnostics

Others

Drug Discovery Segment to Continue Dominating the Proteomics Market (by Application)

Based on application, the proteomics market is led by drug discovery, which held a 53.64% share in 2022.

Segmentation 3: by End User

Biopharmaceutical Companies

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Academic and Research Institutions

Hospitals and Diagnostic Laboratories

Others

Academic and Research Institutions Segment to Continue Holding its Dominance in the Proteomics Market (by End User)

Based on end user, the proteomics market is led by academic and research institutions, which held a 51.50% share in 2022.

Segmentation 4: by Region

North America

U.S.

Canada

Europe

U.K.

Germany

France

Italy

Spain

Rest-of-Europe

Asia-Pacific

China

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Japan

India

South Korea

Australia

Rest-of-Asia-Pacific

Latin America

Brazil

Mexico

Rest-of-Latin America

Middle East and Africa

China dominated the Asia-Pacific proteomics market in 2022, driven by several key factors. The country has made substantial investments in healthcare, biotechnology, and life sciences research, positioning itself as a leader in the region. China's robust infrastructure, large population, and government initiatives, such as the "Made in China 2025" plan, which emphasizes technological innovation, have further accelerated advancements in proteomics technologies.

In addition, China has become a hub for pharmaceutical and biotechnology companies, fostering an environment conducive to research and development in areas such as drug discovery, personalized medicine, and biomarker identification. The growing demand for proteomics in clinical diagnostics, coupled with the country’s increasing focus on precision medicine, has bolstered market growth.

Moreover, the rapid adoption of advanced proteomics technologies, such as mass spectrometry and next-generation sequencing, has allowed China to expand its research capabilities and enhance its position in the global market. With a strong emphasis on improving healthcare outcomes and expanding its scientific capabilities, China is expected to continue to lead the proteomics market in the Asia-Pacific region

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for the foreseeable future.

Recent Developments in the Proteomics Market

In November 2024, Seer, Inc. announced that it had entered into a co-marketing and sales agreement with Thermo Fisher Scientific Inc., the global leader in serving science, to jointly promote Seer's Proteograph Product Suite alongside Thermo Fisher Scientific Inc. Orbitrap Astral mass spectrometers. This strategic collaboration was designed to accelerate the adoption of advanced proteomic technologies, providing researchers with an integrated solution for deep, rapid, and unbiased proteomic analysis at scale.

In November 2024, Sengenics Corporation LLC was acquired by Standard BioTools Inc..

In October 2024, SCIEX, a subsidiary of Danaher Corporation, announced three strategic collaborations to enhance key proteomics capabilities further. The ZenoTOF 7600+ system was made compatible with PEAKS 12.5 from Bioinformatics Solutions Inc., the Evosep One from Evosep, and the Aurora Series XS Range from IonOpticks.

In July 2024, Thermo Fisher Scientific Inc. finalized its acquisition of Olink Holding AB, a leading provider of next-generation proteomics solutions. The transaction, valued at approximately $3.1 billion, integrates Olink into Thermo Fisher Scientific Inc.'s Life Sciences Solutions segment.

In November 2024, Standard BioTools Inc. announced the addition of KREX precision antibody profiling services and kits to its SomaScan suite of solutions. This expanded offering enabled the detection of autoantibody biomarkers and protein interactions for basic, translational, and clinical research.

In October 2024, SCIEX, a subsidiary of Danaher Corporation, expanded its high-resolution accurate mass spectrometry portfolio with the launch of the ZenoTOF 7600+ system, alongside three new collaborations aimed at advancing proteomics capabilities.

Demand – Drivers and Limitations

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Market Demand Drivers:

Increasing Prevalence of Chronic Diseases: The increasing global prevalence of chronic diseases, including cancer, cardiovascular diseases, and neurological disorders, is a significant driver for the proteomics market. Proteomics, with its ability to study the complete protein profile of biological systems, provides unparalleled insights into disease mechanisms, biomarker discovery, and precision medicine.

Recent breakthroughs, such as the development of proteomic tools such as aging clocks and early cancer detection tests, demonstrate the transformative potential of this technology. For instance, studies have shown proteomics-based approaches outperform traditional diagnostics, offering greater accuracy and sensitivity in detecting diseases at early stages. Moreover, advancements in top-down proteomics are bridging the gap between genotypes and phenotypes, enhancing the understanding of proteoforms and their role in disease progression.

The need for early detection, personalized treatment, and disease monitoring is fuelling investments in proteomics technologies, such as mass spectrometry and bioinformatics platforms. These innovations not only address critical healthcare challenges but also present substantial growth opportunities for companies providing proteomics solutions, making it a cornerstone for advancements in healthcare and life sciences.

Advancements in Personalized Medicine and Drug Discovery: Advancements in personalized medicine and drug discovery are significant drivers for the proteomics market, as they demand deeper insights into protein structures, functions, and interactions. Proteomics enables the identification of disease-specific biomarkers and therapeutic targets, which are critical for developing tailored treatments and accelerating drug discovery pipelines.

In personalized medicine, proteomics facilitates early disease detection, patient stratification, and real-time monitoring of treatment responses, aligning with the growing emphasis on precision healthcare. Similarly, in drug discovery, proteomics supports target validation, mechanism-of-action studies, and the evaluation of drug efficacy, helping to streamline R&D processes and reduce time-to-market for new therapies.

With rising investments in biopharmaceutical research and increasing reliance on high-throughput proteomic technologies such as mass spectrometry and bioinformatics, the proteomics market is positioned for robust growth. These advancements are not only transforming healthcare delivery but also creating substantial opportunities for

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companies offering innovative proteomic solutions and services.

Market Restraints:

Shortage of Skilled Professionals: The workforce shortage in proteomics highlights a critical need for industry-wide strategies to address both immediate and long-term challenges. While automation and outsourcing offer viable solutions, building a robust, well-trained workforce remains essential for sustaining growth in the proteomics market. Companies that proactively invest in talent development, employee well-being, and technology integration will be better positioned to navigate these challenges and capitalize on the growing demand for proteomics solutions.

Complexity in Analysing Data of Proteomics Research: The complexity of analyzing proteomics research data acts as a significant restraint for the proteomics market due to several challenges it imposes. Proteomics generates vast and multidimensional datasets that require specialized computational tools, advanced bioinformatics expertise, and significant processing power. The lack of standardization in data handling and interpretation further complicates reproducibility and cross-study comparisons.

For many smaller research institutions and organizations, the high costs associated with acquiring and maintaining the necessary infrastructure and the steep learning curve for using advanced analytics tools limit accessibility to proteomics research. Additionally, the scarcity of skilled professionals capable of managing and interpreting such complex datasets exacerbates this issue, creating bottlenecks in research workflows.

This restraint slows the adoption of proteomics technologies, delays the pace of discoveries, and increases the overall cost and time involved in biomarker identification, drug development, and clinical applications, thereby impeding full-scale market growth.

Market Opportunities:

Progress in Nano Proteomics Platforms to Enhance and Thoroughly Analyze Natural Protein Complexes: The progress in nano proteomics platforms presents a significant opportunity for the proteomics market by addressing critical challenges in protein analysis with innovative solutions. These platforms enable ultra-sensitive detection of low-abundance proteins and offer unparalleled insights into natural protein complexes, which are vital for understanding disease mechanisms and identifying therapeutic targets.

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Nano proteomics enhances biomarker discovery, drug development, and precision diagnostics by providing high-resolution analysis with minimal sample requirements and high throughput. This aligns with the increasing demand for advanced proteomics technologies to support personalized medicine, where understanding intricate protein interactions and modifications is crucial.

As industries such as pharmaceuticals, biotechnology, and diagnostics prioritize innovation, the adoption of nano proteomics platforms creates opportunities for market players to differentiate themselves. Companies investing in nano proteomics technologies can capitalize on the growing need for cutting-edge tools that facilitate breakthroughs in healthcare research, expand clinical applications, and accelerate the development of targeted therapies. This trend is poised to drive robust growth in the proteomics market and position nano proteomics as a cornerstone of future advancements in life sciences.

How can this report add value to an organization?

Product/Innovation Strategy: The global proteomics market has been extensively segmented based on various categories, such as offering, application, end user, and region. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

Growth/Marketing Strategy: The new offering accounted for the maximum number of key developments in the global proteomics market between January 2022 and December 2024.

Competitive Strategy: The global proteomics market has numerous established players with product and service portfolios. Key players in the global proteomics market analyzed and profiled in the study involve established players offering proteomics products and services.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

Detailed secondary research was performed to ensure maximum coverage of manufacturers/suppliers operational in a country.

Exact revenue information, up to a certain extent, was extracted for each

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company from secondary sources and databases. The revenues specific to the offering, application, end user, and region were then estimated for each market player based on fact-based proxy indicators as well as primary inputs.

The scope of this report has been carefully derived based on interactions with experts in different companies across the world. This report provides a market study of proteomics.

The market contribution of the proteomics anticipated to be launched in the future has been calculated based on historical analysis. This analysis has been supported by proxy factors such as the innovation scale of the companies, the status of funding, collaborations, customer base, and patent scenario.

The scope of availability of proteomics products and services in a particular region has been assessed based on a comprehensive analysis of companies' prospects, regional end-user perception, and other factors impacting the launch of proteomics products and services in that region.

The base year considered for the calculation of the market size is 2023. A historical year analysis has been done for the period FY2020-FY2022. The market size has been estimated for FY2023 and projected for the period FY2024-FY2034.

Revenues of the companies have been referenced from their annual reports for FY2020-FY2023. For private companies, revenues have been estimated based on factors such as inputs obtained from primary research, funding history, product approval status, market collaborations, and operational history.

Regional distribution of the market revenue has been estimated based on the companies in each region and the adoption rate of proteomics. All the numbers have been adjusted to a single digit after the decimal for better presentation in the report. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. The CAGR has been calculated for the period 2024-2034.

The market has been mapped based on the available proteomics. All the key companies with significant offerings in this field have been considered and profiled in this report.

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Market strategies and developments of key players have been considered for the calculation of the potential of the market in the forecast period.

Primary Research:

The primary sources involve industry experts in the proteomics market, including the market players offering proteomics solutions. Resources such as CXOs, vice presidents, product managers, directors, territory managers, and business development have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from the primary sources include:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings for proteomics

Understanding the competitive landscape and business model

Current and proposed production values of a product by market players

Validation of the numbers of the different segments of the market in focus

Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

European Medicines Agency (EMA), American Chemical Society (ACS), Frontiers, World Health Organization (WHO), and National Center for Biotechnology Information (NCBI), among others

Annual reports, SEC filings, and investor presentations of the leading market players

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Company websites and detailed study of their portfolios

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentation and percentage share estimates

Company and country understanding, and data for market value estimation

Key industry/market trends

Developments among top players

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, type portfolio, and market penetration.

Some prominent names in the global proteomics market include:

Danaher Corporation

Thermo Fisher Scientific, Inc.

Agilent Technologies, Inc.

Bio-rad Laboratories

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Revvity, Inc.

Illumina, Inc.

DiaSorin S.p.A.

Takara Bio Inc.

Merck KGaA

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