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Global Spatial Proteomics Market Size, Share, and Regional Forecasts 2022–2032

https://marketpublishers.com/r/GCC4DC971C6EEN.html
Date: February 2025
Pages: 285
Price: US$ 3,218.00 (Single User License)
ID: GCC4DC971C6EEN

Abstracts

The Global Spatial Proteomics Market was valued at approximately USD 76.05 million in 2023 and is anticipated to grow at a compound annual growth rate (CAGR) of 15.05% over the forecast period 2024–2032. Spatial proteomics involves mapping proteins within their native tissue environments, offering invaluable insights into cellular functions, disease mechanisms, and therapeutic targets. This technology is particularly significant in fields such as oncology, neuroscience, and immunology, where understanding the spatial arrangement of proteins is critical for biomarker discovery and precision medicine.

Rising demand for advanced imaging and mass spectrometry technologies is driving market growth, enabling researchers to achieve unprecedented levels of resolution and specificity in protein analysis. The pharmaceutical and biotechnology sectors are increasingly adopting spatial proteomics for drug discovery and personalized medicine. For example, innovations such as Imaging Mass Cytometry (IMC), Multiplexed Ion Beam Imaging (MIBI), and Digital Spatial Profiling (DSP) have significantly expanded the capabilities of spatial proteomics, making it a critical tool in biomedical research.

The COVID-19 pandemic highlighted the importance of spatial proteomics in understanding disease mechanisms, particularly in studying viral-host interactions and immune responses. Increased funding for life sciences research post-pandemic has further propelled the adoption of spatial proteomics technologies. For instance, government initiatives like the Human BioMolecular Atlas Program (HuBMAP) have played a vital role in advancing spatial biology, fostering collaboration between academic institutions and market players.

North America dominated the spatial proteomics market in 2024, accounting for 49.13%

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of global revenue. The region’s advanced healthcare infrastructure, significant research investments, and presence of key market players contribute to its leadership. In contrast, the Asia Pacific region is expected to grow at the fastest CAGR of 15.80% over the forecast period, driven by expanding research capabilities, rising investments in healthcare infrastructure, and increasing demand for cancer research solutions.

The consumables segment held the largest revenue share of 56.19% in 2024, attributed to the rising demand for reagents, antibodies, and labeling kits essential for spatial proteomics experiments. The software segment is anticipated to witness the fastest growth, driven by the increasing need for sophisticated data analysis and visualization tools to process high-resolution spatial data.

Key market players are focusing on strategic initiatives such as product launches, mergers and acquisitions, and collaborations to enhance their market position. For instance, in September 2024, Lunaphore launched its spatial biology platform, COMET, in collaboration with Discovery Life Sciences to support clinical research efforts. Similarly, NanoString Technologies introduced the GeoMx IO Proteome Atlas, offering comprehensive spatial proteomics assays.

Major market players included in this report are:

10X Genomics

Bruker

Fluidigm Corporation

NanoString Technologies, Inc.

Akoya Biosciences, Inc.

PerkinElmer

Danaher

Biotechne

S2 Genomics, Inc.

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Seven Bridges Genomics Inc.

The detailed segments and sub-segments of the market are explained below:

By Product:

Instruments

Automated

Semi-automated & Manual

Consumables

Software

By Technology:

Imaging-based Technologies

Mass Spectrometry-based Technologies

Sequencing-based Technologies

Other Technologies

By Workflow:

Sample Preparation

Instrumental Analysis

Data Analysis

By Sample Type:

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FFPE

Fresh Frozen

By End-use:

Academic & Translational Research Institutes

Pharmaceutical and Biotechnology Companies

Other End-uses

By Region: North America:

U.S.

Canada

Mexico

Europe:

Germany

UK

France

Italy

Spain

Denmark

Sweden

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Norway

Asia Pacific:

China

Japan

India

South Korea

Australia

Thailand

Latin America:

Brazil

Argentina

Middle East & Africa:

South Africa

Saudi Arabia

UAE

Kuwait

Years considered for the study:

Historical Year – 2022

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Base Year – 2023

Forecast Period – 2024 to 2032

Key Takeaways:

Market Estimates & Forecast for 10 years from 2022 to 2032.

Annualized revenues and regional-level analysis for each market segment.

Detailed geographical landscape with country-level analysis of major regions.

Competitive landscape with insights on major players.

Recommendations on future market strategies.

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CHAPTER 12. RESEARCH PROCESS

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