

# Global Capillary Electrophoresis Market - 2025 -2033

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## Abstracts

### Global Capillary Electrophoresis Market Size

The global capillary electrophoresis market reached US\$ 349.70 million in 2023, with a rise to US\$ 368.21 million in 2024, and is expected to reach US\$ 611.25 million by 2033, growing at a CAGR of 5.8% during the forecast period 2025–2033.

The capillary electrophoresis market is expanding steadily, fueled by the growing need for high-precision molecular analysis across clinical diagnostics, pharmaceutical development, and biotechnology research. The rise in chronic and genetic disorders, coupled with the increasing emphasis on personalized medicine, is accelerating the adoption of CE technologies. Continuous advancements in separation science, automation, and detection capabilities are enhancing analytical speed and accuracy. Additionally, global investments in laboratory infrastructure and R&D are further boosting market demand, positioning capillary electrophoresis as a critical tool in modern molecular workflows.

### Key Market Trends & Insights

North America held the largest share of the global capillary electrophoresis market in 2023, accounting for approximately 40.1%, and is expected to maintain its leading position throughout the forecast period, driven by advanced research infrastructure, strong presence of key industry players, and robust investment in life sciences.

The Asia Pacific region is projected to be the fastest-growing market, fueled by expanding healthcare infrastructure, increasing adoption of precision diagnostics, rising R&D activities, and growing demand for molecular testing across clinical and research laboratories.

Growing emphasis on personalized medicine, genetic testing, and drug development is driving increased usage of capillary electrophoresis across pharmaceutical, biotechnology, and academic research sectors.

Technological advancements such as improved detection sensitivity, automation, and integration with next-generation sequencing workflows are further accelerating market adoption.

## Market Size & Forecast

2024 Market Size: US\$ 368.21 Million

2033 Projected Market Size: US\$ 611.25 Million

CAGR (2025–2033): 5.8%

North America: Largest market in 2024

Asia Pacific: Fastest-growing market

## Market Dynamics

### Driver: Rising Demand for Precision Diagnostics

The rising demand for precision diagnostics is a major driver propelling the growth of the capillary electrophoresis market, as healthcare systems worldwide increasingly shift toward personalized medicine and targeted therapies. Precision diagnostics require highly accurate, sensitive, and reproducible techniques to analyze genetic, proteomic, and molecular biomarkers. This growing demand has led to significant investment and innovation from industry leaders aiming to deliver more advanced, user-friendly, and clinically compliant CE systems. For instance, in response to evolving clinical needs, in March 2025, Thermo Fisher Scientific launched the Applied Biosystems SeqStudio Flex Dx Genetic Analyzer, a next-generation CE platform engineered to support diagnostic and research applications. The system is fully IVDR-compliant and features flexible workflows, streamlined regulatory integration, and enhanced ease of use.

Moreover, as the burden of chronic and genetic diseases grows globally, especially in oncology, rare disease testing, and infectious disease management, laboratories are increasingly adopting CE for its precision and reliability in nucleic acid and protein analysis. This alignment between technological innovation and diagnostic demand continues to accelerate market growth, with CE becoming a vital component in modern molecular diagnostic pipelines.

#### Restraint: High Equipment and Maintenance Costs

High equipment and maintenance costs pose a significant challenge to the growth of the capillary electrophoresis market. Advanced CE systems often require substantial upfront investment and ongoing expenses for calibration, consumables, and technical support, which can be prohibitive for smaller laboratories and facilities in developing regions. This financial barrier limits widespread adoption, especially where budget constraints restrict access to cutting-edge technologies. As a result, despite the clear advantages of CE, cost concerns may slow market penetration and delay the technology's broader integration into routine clinical and research workflows.

#### Segment Analysis

The capillary electrophoresis market is segmented based on product type, mode of capillary electrophoresis, application, end-user and region.

**Mode of Capillary Electrophoresis**—The capillary gel electrophoresis (CGE) segment is estimated to have 44.8% of the capillary electrophoresis market share.

The capillary gel electrophoresis (CGE) segment is expected to dominate the capillary electrophoresis market due to its superior ability to separate biomolecules like nucleic acids and proteins with high resolution and reproducibility. CGE is widely used in genetic analysis, quality control of biopharmaceuticals, and clinical diagnostics, where precise sizing and quantification of DNA, RNA, and protein fragments are critical. Its advantages over traditional electrophoresis methods make it the preferred choice for many laboratories.

As demand for advanced molecular diagnostics and biologics characterization grows, the CGE segment is poised to maintain a leading market position, driven by continuous technological improvements and expanding applications in genomics and proteomics research.

## Geographical Analysis

The North America Capillary Electrophoresis market was valued at 39.8% market share in 2024

North America is expected to dominate the capillary electrophoresis market due to its well-established healthcare infrastructure, advanced research facilities, and strong presence of key market players. For instance, in January 2024, Agilent Technologies Inc. (NYSE: A) announced the launch of its new automated parallel capillary electrophoresis system for protein analysis, the Agilent ProteoAnalyzer, at the 23rd Annual PepTalk Conference held from January 16-19 in San Diego. This innovative platform streamlines and enhances the efficiency of analyzing complex protein mixtures, a critical step in analytical workflows across pharmaceutical, biotechnology, food analysis, and academic research sectors.

The region benefits from substantial investments in life sciences research, genomics, and personalized medicine, which drive the adoption of sophisticated analytical technologies like capillary electrophoresis. Additionally, supportive regulatory frameworks and robust funding for clinical and pharmaceutical research further boost market growth. High awareness among healthcare professionals about the advantages of CE in diagnostics and drug development also contributes to its widespread use across clinical laboratories and biopharmaceutical companies, solidifying North America's leading position in the global market.

## Competitive Landscape

The major players in the capillary electrophoresis market include Thermo Fisher Scientific Inc., Agilent Technologies Inc., Sebia, Bio-Techne, Teledyne Digital Imaging Inc., SCIEX, Promega Corporation, Lumex Instruments, DH Life Sciences, LLC, Bio-Rad Laboratories, Inc., among others.

**Thermo Fisher Scientific Inc.:** Thermo Fisher Scientific is a leading player in the capillary electrophoresis market, offering a comprehensive portfolio of advanced CE systems and consumables tailored for diverse clinical and research applications. Their product lineup includes the Applied Biosystems SeqStudio Flex Dx Genetic Analyzer, designed for high-throughput genetic analysis with flexible workflows and regulatory compliance, and the PA 800 Plus Pharmaceutical Analysis System, widely used for biopharmaceutical characterization. Thermo Fisher also provides a range of reagents, kits, and software solutions that enhance accuracy, efficiency, and ease of use in

molecular separation and analysis. The company continuously drives innovation by integrating cutting-edge technologies such as automation, microfluidics, and high-sensitivity detection, ensuring superior performance and meeting the evolving needs of diagnostics, pharmaceutical development, and life sciences research.

The capillary electrophoresis market report delivers a detailed analysis with 73 key tables, more than 76 visually impactful figures, and 195 pages of expert insights, providing a complete view of the market landscape.

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