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# Global Companion Diagnostic IHC Assay Kits Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G534C24D144EEN.html
Date: September 2026
Pages: 89
Price: US$ 4,480.00 (Single User License)
ID: G534C24D144EEN

## Abstracts

The global Companion Diagnostic IHC Assay Kits market size is expected to reach $ 1210 million by 2032, rising at a market growth of 9.0% CAGR during the forecast period (2026-2032).

Companion diagnostic IHC assay kits are regulated in vitro diagnostic products used to detect specific protein biomarkers in formalin-fixed, paraffin-embedded tissue and other pathology specimens, with the result directly linked to patient selection for a corresponding targeted therapy, immunotherapy, or antibody-drug conjugate. A commercial assay commonly combines a clinically validated primary antibody with positive and negative controls, chromogenic or other detection reagents, and a defined interpretation procedure. Testing may be performed on fully automated, semi-automated, or manual immunohistochemistry workflows, with treatment-related results derived from staining intensity, the percentage of positive cells, composite scoring algorithms, or protein-loss patterns. Key performance requirements include analytical specificity, lot-to-lot consistency, platform compatibility, stability of clinical cutoffs, and inter-laboratory reproducibility. The principal customers are hospital pathology laboratories, independent reference laboratories, pharmaceutical developers, and diagnostic co-development programs. The average gross margin is approximately 60%.

The continued expansion of precision oncology is creating mandatory demand for tissue-based protein biomarker testing. Broader use of immune checkpoint inhibitors, HER2-directed therapies, and drugs targeting emerging markers such as CLDN18.2, FOLR1, and PTEN is extending companion diagnostic IHC beyond its traditional concentration in breast and lung cancer. Hospital pathology departments and central laboratories increasingly prioritize alignment with drug labels, validated clinical cutoffs, and interpretation manuals, creating a clear commercial boundary between regulated

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companion diagnostic kits and general-purpose IHC antibodies.

Product development is focused on ready-to-use reagents, standardized controls, automated staining workflows, and digital pathology-assisted interpretation. Leading suppliers typically co-develop assays with pharmaceutical companies and use installed staining platforms to standardize antibody clones, detection chemistry, and scoring algorithms across laboratories. The expansion of multiprotein panels and newer membrane-protein targets is also increasing requirements for tissue controls, cutoff validation, pathologist training, and multi-region regulatory submissions, shifting competition from individual reagent sales toward integrated platforms, assays, interpretation standards, and drug-development partnerships.

North America and Europe remain the leading markets because of concentrated regulatory approvals, strong linkage with innovative oncology drugs, and high penetration of automated pathology platforms. China and Japan are expanding through local drug indications, domestic assay approvals, and investment in pathology testing capacity. Opportunities are emerging from new antibody-drug conjugates, tumor-agnostic immunotherapy, and regional companion diagnostic development, while platform lock-in, inter-clone concordance, specimen pre-analytics, reimbursement, and frequent drug-label updates can slow commercialization. Suppliers able to support pharmaceutical development, regulatory validation, and routine laboratory implementation are positioned more favorably.

## Report Scope

This report studies the global Companion Diagnostic IHC Assay Kits production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Companion Diagnostic IHC Assay Kits and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Companion Diagnostic IHC Assay Kits that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Companion Diagnostic IHC Assay Kits total production and demand,

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2021-2032, (Units)

Global Companion Diagnostic IHC Assay Kits total production value, 2021-2032, (USD Million)

Global Companion Diagnostic IHC Assay Kits production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Companion Diagnostic IHC Assay Kits consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Companion Diagnostic IHC Assay Kits domestic production, consumption, key domestic manufacturers and share

Global Companion Diagnostic IHC Assay Kits production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Companion Diagnostic IHC Assay Kits production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Companion Diagnostic IHC Assay Kits production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Companion Diagnostic IHC Assay Kits market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Agilent Technologies, Roche, Leica Biosystems, Amoy Diagnostics, Nichirei Biosciences, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Companion Diagnostic IHC Assay Kits market

## Detailed Segmentation:

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Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

### Global Companion Diagnostic IHC Assay Kits Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Companion Diagnostic IHC Assay Kits Market, Segmentation by Type:

Primary Antibody-Only Kits

Single-Marker Complete Assay Kits

Multiprotein Panel Kits

Other Kit Configurations

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## Global Companion Diagnostic IHC Assay Kits Market, Segmentation by Detection Format:

Single-Target Chromogenic IHC Assays

Multiprotein Panel IHC Assays

Dual-Stain or Multiplex IHC Assays

Other Detection Formats

## Global Companion Diagnostic IHC Assay Kits Market, Segmentation by Staining Platform Type:

Closed Automated Platforms

Open Automated Platforms

Manual or Semi-Automated Workflows

Other Platform Types

## Global Companion Diagnostic IHC Assay Kits Market, Segmentation by Application:

Hospital Pathology Laboratories

Independent Reference Laboratories

Pharmaceutical and Biotechnology Companies

Academic and Research Institutions

Others

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## Companies Profiled:

Agilent Technologies

Roche

Leica Biosystems

Amoy Diagnostics

Nichirei Biosciences

## Key Questions Answered

1. How big is the global Companion Diagnostic IHC Assay Kits market?
2. What is the demand of the global Companion Diagnostic IHC Assay Kits market?
3. What is the year over year growth of the global Companion Diagnostic IHC Assay Kits market?
4. What is the total value of the global Companion Diagnostic IHC Assay Kits market?
5. Who are the Major Players in the global Companion Diagnostic IHC Assay Kits market?
6. What are the growth factors driving the market demand?

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