

Global Liquid-phase Breeding Chip Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Liquid-phase Breeding Chip market size is expected to reach \$ 148 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

A liquid-phase breeding chip is a genotyping platform that performs DNA marker detection in solution rather than on a fixed solid array. Instead of immobilizing probes on glass or silicon, it uses solution-based chemistries such as multiplex PCR, target capture sequencing, or allele-specific fluorescence assays (e.g., KASP, AgriSeq, genotyping-by-sequencing) to identify genetic variation. Because it is flexible, scalable, and often cheaper per sample for smaller marker sets, liquid-phase chips are widely applied in crop and livestock breeding programs to verify specific traits, accelerate marker-assisted selection, and reduce costs compared to high-density solid-phase arrays.

The upstream segment of the liquid-phase breeding chip industry focuses on the development and production inputs necessary to create the chips. It includes the collection and analysis of plant genetic resources, such as germplasm and DNA samples, and the identification of genetic markers through biotechnology and sequencing. In addition, upstream suppliers provide chip design, reagents, substrates, and microarray or manufacturing services that enable high-throughput genotyping.

The downstream segment centers on the application and commercialization of these chips. Major users include seed companies, crop breeding institutes, and agricultural research organizations, which apply chip-based genotyping to accelerate marker-assisted selection, trait analysis, and variety improvement. Ultimately, the results benefit farmers and agribusinesses through the development of high-yield, stress-resistant, and

disease-tolerant crop varieties. In short, upstream activities provide the technological foundation for chip production, while downstream activities translate that technology into practical breeding innovations and commercial seed products.

In 2025, global Liquid-phase Breeding Chip production reached approximately 2481 k Pcs, with an average global market price of around 39 USD/ Pc,.The production capacity for Liquid-phase Breeding Chip in 2025 was approximately 3000 k Pcs. The typical gross profit margin for Liquid-phase Breeding Chip between 20% and 40%.

The liquid-phase breeding chip market is being driven by the digital transformation of the seed industry, commercialization of molecular breeding, wider adoption of genomic selection, and growing demand to shorten crop and animal breeding cycles. Compared with fixed-content solid-state arrays, liquid-phase panels allow markers to be added, removed, or adjusted more easily according to species, breeding populations, and target traits, making them particularly suitable for new variety development, germplasm evaluation, and proprietary marker databases. As high-quality reference genomes, whole-genome resequencing datasets, and validated trait-associated markers continue to expand, liquid-phase chips are progressing from research-oriented validation tools toward large-scale breeding selection and commercial testing platforms. Future competition will focus on proprietary marker resources, probe and primer design, sequencing cost, genotype-calling accuracy, bioinformatics software, and integrated breeding data services, while marker transferability across populations, testing standardization, and data consistency at large sample volumes remain important market challenges.

This report studies the global Liquid-phase Breeding Chip production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Liquid-phase Breeding Chip 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 Liquid-phase Breeding Chip that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Liquid-phase Breeding Chip total production and demand, 2021-2032, (K Pcs)
Global Liquid-phase Breeding Chip total production value, 2021-2032, (USD Million)
Global Liquid-phase Breeding Chip production by region & country, production, value,

CAGR, 2021-2032, (USD Million) & (K Pcs), (based on production site)

Global Liquid-phase Breeding Chip consumption by region & country, CAGR, 2021-2032 & (K Pcs)

U.S. VS China: Liquid-phase Breeding Chip domestic production, consumption, key domestic manufacturers and share

Global Liquid-phase Breeding Chip production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Pcs)

Global Liquid-phase Breeding Chip production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

Global Liquid-phase Breeding Chip production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Pcs)

This report profiles key players in the global Liquid-phase Breeding Chip 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 Thermo Fisher Scientific, Agilent, Illumina, Anascan, Lasso Biochip Technology, GreenFaFa, 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 Liquid-phase Breeding Chip market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Pcs) and average price (US\$/Pc) 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 Liquid-phase Breeding Chip Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Liquid-phase Breeding Chip Market, Segmentation by Type:

SNP Breeding Panels

InDel Breeding Panels

Combined SNP and InDel Panels

Global Liquid-phase Breeding Chip Market, Segmentation by Product Design:

Semi-custom Chips

Fully Custom Chips

Global Liquid-phase Breeding Chip Market, Segmentation by Number of Target Markers:

Low-density Crop Breeding Chips

Medium-density Crop Breeding Chips

High-density Crop Breeding Chips

Global Liquid-phase Breeding Chip Market, Segmentation by Application:

Crop Seed Industry

Livestock and Poultry Breeding

Aquaculture Breeding

Horticulture and Forestry Breeding

Others

Companies Profiled:

Thermo Fisher Scientific

Agilent

Illumina

Qiagen

Lasso Biochip Technology

GreenFaFa

Key Questions Answered:

1. How big is the global Liquid-phase Breeding Chip market?
2. What is the demand of the global Liquid-phase Breeding Chip market?
3. What is the year over year growth of the global Liquid-phase Breeding Chip market?
4. What is the production and production value of the global Liquid-phase Breeding Chip market?
5. Who are the key producers in the global Liquid-phase Breeding Chip market?
6. What are the growth factors driving the market demand?

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