

Global Pan-cancer Genomic Profiling Market 2026 by Company, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Pan-cancer Genomic Profiling market size was valued at US\$ 6462 million in 2025 and is forecast to a readjusted size of US\$ 15343 million by 2032 with a CAGR of 13.1% during review period.

Pan-cancer Genomic Profiling refers to clinical diagnostic and precision oncology solutions that use targeted next-generation sequencing, whole-exome sequencing, whole-transcriptome sequencing, or integrated DNA and RNA analysis to profile genomic alterations and molecular biomarkers across multiple solid tumors or hematologic malignancies. Major targets include single nucleotide variants, insertions and deletions, copy number alterations, gene fusions and rearrangements, as well as genomic signatures such as tumor mutational burden, microsatellite instability, and homologous recombination deficiency. Commercial offerings mainly include centralized laboratory testing services, tissue and liquid biopsy assay kits, integrated testing systems, and associated bioinformatics solutions. These products are primarily used for targeted therapy selection, immunotherapy assessment, clinical trial matching, molecular classification, and resistance analysis. Key upstream inputs include specimen collection components, nucleic acid extraction and library preparation reagents, capture probes, amplification enzymes, sequencing flow cells, quality controls, sequencing platforms, bioinformatics algorithms, and genomic databases. Major downstream customers include hospitals, cancer centers, independent clinical laboratories, pathology laboratories, pharmaceutical and biotechnology companies, and clinical research organizations. The estimated industry gross margin is generally approximately 50%?70%.

The global Pan-cancer Genomic Profiling market is shifting from sequential single-gene tests and tumor-specific small panels toward integrated testing of multiple genes and variant classes in a single assay. As targeted therapies, immunotherapies, and tumor-agnostic indications continue to expand, clinicians increasingly require more complete molecular information. Large panels can reduce repeated tissue consumption and shorten the time associated with multiple sequential tests, supporting broader adoption among patients with advanced solid tumors, rare cancers, and limited standard treatment options. North America remains dominated by centralized reference laboratory services, while Europe and Japan rely more heavily on approved assay products combined with hospital testing networks. China has developed a mixed market structure that includes third-party laboratory services, hospital-developed testing, and standardized domestic assay kits.

Tissue-based testing remains the foundation of Pan-cancer Genomic Profiling, while liquid biopsy is becoming an important complementary option for patients with insufficient tissue, high biopsy risk, or a need for rapid results. Technology is progressing from DNA-only targeted sequencing toward integrated DNA and RNA analysis, matched tumor-normal testing, whole-exome sequencing, and whole-transcriptome sequencing. RNA analysis can improve the detection of gene fusions and abnormal splicing events, while matched testing helps distinguish somatic alterations from germline variants and clonal hematopoiesis signals. Future product differentiation will focus increasingly on analytical performance in low-tumor-content samples, fusion detection, turnaround time, interpretation quality, and the clinical actionability of reported findings rather than on gene count alone.

Market growth is supported by the expansion of precision oncology, increasing numbers of tumor-agnostic targeted and immunotherapy indications, stronger clinical guideline recommendations, and wider availability of hospital NGS infrastructure. Drug development programs increasingly select patients according to molecular biomarkers rather than the organ of tumor origin, driving demand from pharmaceutical companies for companion diagnostics, patient recruitment, clinical trial matching, and real-world data analysis. As sequencing costs decline, laboratory workflows become more automated, and reimbursement coverage improves in selected markets, Pan-cancer Genomic Profiling is expected to expand from advanced-stage patients and complex cases toward earlier treatment stages and a broader patient population.

The industry nevertheless faces constraints related to specimen quality, testing costs, reimbursement coverage, and the clinical conversion of genomic findings. Differences in gene coverage, sequencing depth, variant thresholds, and reporting standards may

produce inconsistent results across laboratories. Some patients have potentially actionable alterations but cannot access matched treatment because of drug availability, regulatory indications, or the geographic location of relevant clinical trials. Competition between hospital-developed assays and centralized laboratory services may also create pricing pressure and duplicated infrastructure investment. Future competitive advantage will depend increasingly on regulatory approvals, companion diagnostic partnerships, liquid biopsy performance, bioinformatics capabilities, reimbursement access, and real-world evidence demonstrating clinical utility.

This report is a detailed and comprehensive analysis for global Pan-cancer Genomic Profiling market. Both quantitative and qualitative analyses are presented by company, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Pan-cancer Genomic Profiling market size and forecasts, in consumption value (\$ Million), 2021-2032

Global Pan-cancer Genomic Profiling market size and forecasts by region and country, in consumption value (\$ Million), 2021-2032

Global Pan-cancer Genomic Profiling market size and forecasts, by Type and by Application, in consumption value (\$ Million), 2021-2032

Global Pan-cancer Genomic Profiling market shares of main players, in revenue (\$ Million), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Pan-cancer Genomic Profiling

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Pan-cancer Genomic Profiling market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Roche, Guardant Health, Caris Life Sciences, Tempus AI, Labcorp, NeoGenomics, Exact Sciences, Personalis, Illumina, Thermo Fisher Scientific, etc.

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

Market segmentation

Pan-cancer Genomic Profiling market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for Consumption Value by Type and by Application. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Tissue-based Profiling

Liquid Biopsy Profiling

Other

Market segment by Testing Scope

Medium Panels (50?199 Genes)

Large Panels (200?599 Genes)

Extended Panels (600?999 Genes)

Other

Market segment by Sequencing Approach

- Targeted DNA Sequencing
- Integrated DNA and RNA Sequencing
- Whole-exome Sequencing
- Whole-transcriptome Sequencing
- Other

Market segment by Application

- Hospitals and Cancer Centers
- Independent Clinical Laboratories
- Pharmaceutical and Biotechnology Companies
- Other

Market segment by players, this report covers

- Roche
- Guardant Health
- Caris Life Sciences
- Tempus AI
- Labcorp
- NeoGenomics
- Exact Sciences

Personalis

Illumina

Thermo Fisher Scientific

QIAGEN

Agilent Technologies

SOPHiA GENETICS

Sysmex

Burning Rock Biotech

Genetron Health

Geneseeq

BGI Genomics

Amoy Diagnostics

Market segment by regions, regional analysis covers

North America (United States, Canada and Mexico)

Europe (Germany, France, UK, Russia, Italy and Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia and Rest of Asia-Pacific)

South America (Brazil, Rest of South America)

Middle East & Africa (Turkey, Saudi Arabia, UAE, Rest of Middle East & Africa)

The content of the study subjects, includes a total of 13 chapters:

Chapter 1, to describe Pan-cancer Genomic Profiling product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top players of Pan-cancer Genomic Profiling, with revenue, gross margin, and global market share of Pan-cancer Genomic Profiling from 2021 to 2026.

Chapter 3, the Pan-cancer Genomic Profiling competitive situation, revenue, and global market share of top players are analyzed emphatically by landscape contrast.

Chapter 4 and 5, to segment the market size by Type and by Application, with consumption value and growth rate by Type, by Application, from 2021 to 2032.

Chapter 6, 7, 8, 9, and 10, to break the market size data at the country level, with revenue and market share for key countries in the world, from 2021 to 2026. and Pan-cancer Genomic Profiling market forecast, by regions, by Type and by Application, with consumption value, from 2027 to 2032.

Chapter 11, market dynamics, drivers, restraints, trends, Porters Five Forces analysis.

Chapter 12, the key raw materials and key suppliers, and industry chain of Pan-cancer Genomic Profiling.

Chapter 13, to describe Pan-cancer Genomic Profiling research findings and conclusion.

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