

Global Pan-cancer Genomic Profiling Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pan-cancer Genomic Profiling market size is expected to reach \$ 15343 million by 2032, rising at a market growth of 13.1% CAGR during the forecast period (2026-2032).

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 studies the global Pan-cancer Genomic Profiling demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pan-cancer Genomic Profiling, 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 Pan-cancer Genomic Profiling that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pan-cancer Genomic Profiling total market, 2021-2032, (USD Million)

Global Pan-cancer Genomic Profiling total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Pan-cancer Genomic Profiling total market, key domestic companies, and share, (USD Million)

Global Pan-cancer Genomic Profiling revenue by player, revenue and market share 2021-2026, (USD Million)

Global Pan-cancer Genomic Profiling total market by Type, CAGR, 2021-2032, (USD Million)

Global Pan-cancer Genomic Profiling total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Pan-cancer Genomic Profiling market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Pan-cancer Genomic Profiling Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pan-cancer Genomic Profiling Market, Segmentation by Type:

Tissue-based Profiling

Liquid Biopsy Profiling

Other

Global Pan-cancer Genomic Profiling Market, Segmentation by Testing Scope:

Medium Panels (50?199 Genes)

Large Panels (200?599 Genes)

Extended Panels (600?999 Genes)

Other

Global Pan-cancer Genomic Profiling Market, Segmentation by Sequencing Approach:

Targeted DNA Sequencing

Integrated DNA and RNA Sequencing

Whole-exome Sequencing

Whole-transcriptome Sequencing

Other

Global Pan-cancer Genomic Profiling Market, Segmentation by Application:

Hospitals and Cancer Centers

Independent Clinical Laboratories

Pharmaceutical and Biotechnology Companies

Other

Companies Profiled:

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

Key Questions Answered

1. How big is the global Pan-cancer Genomic Profiling market?
2. What is the demand of the global Pan-cancer Genomic Profiling market?
3. What is the year over year growth of the global Pan-cancer Genomic Profiling

market?

4. What is the total value of the global Pan-cancer Genomic Profiling market?
5. Who are the Major Players in the global Pan-cancer Genomic Profiling market?
6. What are the growth factors driving the market demand?

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