

# Europe, CIS & Africa Spatial Transcriptomics Market Size, Share & Trends Analysis Report By Product (Instruments, Consumables), By Technology (Sequencing-based Methods, IHC), By Workflow, By Sample Type, By End-use, By Country, And Segment Forecasts, 2024 - 2030

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## Abstracts

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### Europe, CIS & Africa Spatial Transcriptomics Market Growth & Trends

The Europe, CIS & Africa spatial transcriptomics market size is anticipated to reach USD 256.1 million by 2030, growing at a CAGR of 15.57% from 2024 to 2030, according to a new report by Grand View Research, Inc. The emerging potential of spatial omics analysis for cancer research, the advent of the fourth generation of sequencing (in situ sequencing), and increasing funding & collaborative initiatives in spatial biology research are likely to contribute to market growth. Moreover, the growing prevalence of chronic diseases necessitates efficient biomarker discovery and early & accurate diagnosis for effective disease management and treatment.

The spatial biology field has observed rapid development in the past few years. Commercial advancements in spatial multiomics methods, with increased capacity, multiplexity, and improved resolution, are some of the factors driving market growth. New instruments with higher multiplexing capabilities and resolution are enabling researchers to obtain more detailed insights from spatial analyses. End-to-end scalable and reproducible workflows make it easier for researchers to conduct spatial analysis efficiently. In addition, ongoing developments in the field are expected

It will further accelerate the integration of spatial biology into various stages of the drug discovery pipeline.

Furthermore, spatial omics analysis enables the identification of spatially resolved molecular signatures that can serve as potential biomarkers for cancer diagnosis and prognosis. By analyzing the spatial distribution of specific molecules within the tumor microenvironment, researchers can uncover novel biomarkers that may not be detectable using traditional omics approaches. In addition, by understanding the spatial organization of different cell populations and their interactions, clinicians can tailor treatment regimens to target specific subpopulations more effectively within a tumor. For instance, according to an article published in *The Lancet* in October 2022, scientists studied tissue architecture in Esophageal Squamous Cell Carcinoma (ESCC) by integrating microarray-based spatial transcriptomics and single-cell RNA sequencing.

The COVID-19 pandemic significantly impacted the market, with disruptions in supply chains and manufacturing processes leading to shortages and delays in manufacturing timelines. However, post-pandemic advancements in bioinformatics and computational biology have simplified the interpretation of complex datasets generated by ST, expanding its applications across various industries such as pharmaceuticals, biotechnology, and research institutions. Furthermore, the heightened awareness and interest in medical research due to the pandemic have further boosted the growth of the market.

However, one significant restraint of the market is the high cost associated with the technologies and instruments required for spatially resolved molecular profiling. The expense of acquiring and maintaining these advanced instruments can pose a barrier to entry for researchers and healthcare providers, especially those operating in resource-constrained environments. This financial challenge may limit access to innovative spatial transcriptomic technologies, hindering research progress and potentially impeding advancements in personalized medicine & disease understanding.

## Europe, CIS & Africa Spatial Transcriptomics Market Report Highlights

Consumables dominated the product segment in 2023 owing to the high product penetration, increasing use of reagents & kits, wide product availability, and frequent purchase of consumables to run instruments.

In 2023, sequencing-based methods dominated the technology segment

and held the largest revenue share in 2023. Furthermore, the microscopy-based RNA imaging techniques segment is expected to grow at a significant CAGR over the forecast period.

On the basis of workflow, the sample preparation segment held the largest revenue share of 55.49% in 2023 as it is crucial for obtaining high-quality sequencing products for performing genomics & transcriptomics studies.

The FFPE segment dominated the sample type segment in terms of revenue in 2023. New techniques are devised for gene expression profiling in FFPE that further drive segment growth. However, the fresh frozen segment is anticipated to grow at the highest CAGR of 17.14% from 2024 to 2030.

Translational research dominated the end use market with the largest share in 2023. By mapping gene expression patterns within tissues, spatial transcriptomics helps understand molecular mechanisms underlying disease pathogenesis. Researchers can identify key genes and pathways associated with specific diseases, leading to the discovery of potential therapeutic targets.

Europe region dominated the market with a share of 94.57% in 2023, owing to factors such as increasing investments in R&D activities, established biotechnology R&D sector, and presence of key players.

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