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Global Biosensor Chip Market Growth 2026-2032

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Abstracts

The global Biosensor Chip market size is predicted to grow from US$ 3404 million in 2025 to US$ 7283 million in 2032; it is expected to grow at a CAGR of 11.6% from 2026 to 2032.

Biosensor Chip refers to a chip-scale sensing or dedicated readout device that uses semiconductor integrated circuits, micro- and nanofabricated structures, functionalized sensor surfaces, microelectrode arrays, photonic components, field-effect transistors or nanopore architectures to detect biological molecules, biochemical reactions or physiological signals and convert them into measurable electrical, optical, frequency-domain, ionic-current or digital outputs. The market primarily covers biosensor ICs and analog front ends, CMOS biosensors, BioFET and ISFET devices, electrochemical sensor chips, optical and photonic sensor chips, SPR and LSPR sensor chips, nanopore sensing arrays, sequencing sensor chips, microelectrode arrays, microarray-based detection chips and disposable chip-based sensing consumables. Core performance parameters include sensitivity, limit of detection, selectivity, signal-to-noise ratio, dynamic range, response time, power consumption, channel density, sample-volume requirement, multiplexing capability, surface stability and manufacturing consistency. Biosensor Chip products are principally applied in vital-sign monitoring, clinical diagnostics, molecular sequencing, proteomics, drug discovery, metabolite monitoring, food testing and environmental analysis.

Key Findings

Physiological and wearable sensing ICs constitute the largest Biosensor Chip product segment

North America leads high-value demand while China records the strongest supply-side expansion

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Sequencing nanopore and single-molecule chips provide the highest level of technology differentiation

Disposable platform-linked sensor chips generate recurring consumables demand and high switching costs

The verified core supplier pool contains 38 parent-level Biosensor Chip manufacturers

Market Trends

The Biosensor Chip industry is moving from single-parameter sensing toward multimodal, highly integrated and application-specific architectures. Wearable products increasingly combine optical heart-rate sensing, electrocardiography, bioimpedance, electrodermal activity and temperature measurement within a single IC, module or coordinated sensor system. Samsung’s BioActive Sensor combines optical, electrical and bioimpedance sensing on one chip, while current Goodix products integrate PPG, ECG, Bio-Z and other physiological measurements. Product development is also shifting from sensing-only dies toward devices incorporating analog front ends, digital conversion, embedded processing, microfluidics and application-specific packaging. In molecular analysis, proprietary disposable flow cells containing sensor arrays, nanopores and dedicated ASICs are becoming central to platform performance and recurring revenue. BioFET, graphene, nanopore and single-molecule detection technologies are broadening the range of measurable targets, although their commercial progress increasingly depends on surface chemistry, calibration stability and scalable manufacturing rather than laboratory sensitivity alone.

Market Dynamics

Drivers

Demand growth is supported by the continued integration of physiological monitoring into watches, rings, patches and other compact devices, together with the expansion of remote and home-based health assessment. The FDA’s authorized sensor-based digital health device resources demonstrate the widening use of wearable systems for continuous or spot-check monitoring outside conventional clinical settings. At the component level, lower-power and more highly integrated biosensing analog front ends enable manufacturers to reduce device size, system cost and development time. Molecular diagnostics, genomic sequencing and biopharmaceutical research provide a

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second demand engine, as these applications require higher channel density, smaller sample volumes, real-time signal acquisition and repeat purchases of sensor chips or flow cells. Drug discovery also creates stable demand for functionalized SPR chips used in affinity, kinetics and molecular-interaction analysis.

Restraints

Market expansion is constrained by the technical and economic gap between a functional laboratory prototype and a repeatable commercial product. Biosensor Chip performance can be affected by biofouling, nonspecific adsorption, baseline drift, temperature variation, motion artifacts and complex-sample interference. Functionalized surfaces, biological recognition materials and microfluidic interfaces may introduce batch variation that is more difficult to control than conventional semiconductor parameters. Clinical and diagnostic products also require lengthy verification, regulatory review and quality-system compliance, increasing development cost and delaying revenue generation. In price-sensitive wearable and electrochemical applications, suppliers must simultaneously improve accuracy and integration while absorbing continued pressure on component prices. Closed-platform compatibility can further limit addressable demand for sensor-chip suppliers that lack their own instrument, assay or software ecosystem.

Opportunities

The most attractive opportunities are emerging where semiconductor-scale manufacturing can replace bulky optical, laboratory or manually interpreted detection workflows. Point-of-care molecular diagnostics, decentralized testing, chronic-disease monitoring and connected home health systems require compact sensors that offer rapid results with minimal sample preparation. Regulatory acceptance of over-the-counter continuous biosensing systems expands the potential addressable population beyond traditional hospital and prescription channels. Nanopore devices provide opportunities in portable DNA and RNA sequencing, while semiconductor protein sequencing and BioFET platforms could create new applications in proteomics, biomarker detection and real-time molecular analysis. Graphene field-effect sensors are also being evaluated for healthcare, agricultural and environmental testing, where disposable formats and direct electronic readout may support lower-cost point-of-need solutions.

Challenges

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The central industry challenge is achieving reliable performance across manufacturing lots, operating environments and real biological samples. A device that performs well under controlled research conditions may still face sensitivity loss, calibration drift or false-positive risk when exposed to blood, sweat, saliva, food matrices or environmental samples. Emerging suppliers must coordinate semiconductor design, receptor chemistry, surface functionalization, packaging, fluid handling, algorithms and application validation, creating long development cycles and substantial capital requirements. Fragmented assay protocols and limited interoperability between proprietary platforms reduce standardization and make direct product comparison difficult. Companies also face intellectual-property risk, dependence on specialized materials and foundries, customer concentration and uncertainty regarding reimbursement or regulatory pathways. These factors can slow commercialization even where the underlying sensing principle is technically differentiated.

Industry Chain Analysis

The upstream Biosensor Chip industry includes semiconductor wafers, CMOS and MEMS processes, noble metals, graphene and other functional materials, photodetectors, electrodes, specialty polymers, microfluidic substrates and biological recognition materials such as enzymes, antibodies, nucleic-acid probes and aptamers. Foundries, microfabrication specialists, packaging companies and surface-chemistry suppliers provide essential manufacturing capabilities. Unlike conventional IC production, biological sensor manufacturing frequently requires additional surface modification, reagent deposition, fluidic integration and wet-process quality control after wafer fabrication. These steps can become critical sources of cost, yield loss and product differentiation.

Midstream activities comprise chip architecture and circuit design, wafer fabrication, sensor-surface preparation, biological functionalization, microfluidic or optical integration, packaging, calibration, testing and assay validation. Value creation differs by product model. High-volume physiological sensing IC suppliers derive value from mixed-signal intellectual property, manufacturing scale and customer qualification, while sequencing, SPR and diagnostic-platform owners capture recurring revenue through proprietary disposable chips and flow cells. Specialist sensor companies typically operate at lower volumes but may command higher engineering value through customized surfaces, assay development and application support. Downstream integration covers wearable devices, medical monitoring systems, molecular diagnostic platforms, sequencing instruments, life-science analytical systems and testing equipment used in food, agriculture and environmental applications.

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Segment Insights

By product type, biosensor ICs and integrated sensing modules represent the largest segment in shipment terms because they are deployed in high-volume wearable, portable medical and health-monitoring devices. Disposable sensor chips, sequencing flow cells and functionalized interaction-analysis chips generally have lower unit volumes but higher value per unit and stronger recurring-revenue characteristics. Reusable SPR and QCM chips occupy a specialized market in research and pharmaceutical analysis, while custom and OEM dies serve applications where standard components cannot meet specific electrode, channel-density, packaging or sample-handling requirements.

By transduction mechanism, electrochemical and optical sensing remain the most commercially mature routes. Electrochemical chips benefit from compact architecture, relatively low power consumption and direct compatibility with metabolite and biochemical measurements. Optical sensing dominates many physiological-monitoring and labeled molecular-analysis applications, while SPR and related label-free technologies hold established positions in biomolecular interaction analysis. Nanopore, BioFET, graphene and single-molecule semiconductor sensing are among the most innovation-intensive directions. Their market contribution remains smaller than mature technologies, but they offer stronger opportunities for direct electronic readout, real-time detection and high-density molecular analysis.

Downstream Market Opportunities

Wearable and connected-health products offer the broadest volume opportunity as manufacturers add more physiological parameters while reducing device size and power consumption. Medical monitoring and in-vitro diagnostics provide higher-value opportunities but require stronger evidence, quality control and regulatory compliance. Molecular sequencing and proteomics offer attractive recurring-consumables models because the sensing chip is closely linked to the instrument and analytical workflow. Pharmaceutical and biotechnology applications support demand for high-performance interaction-analysis chips where data quality and surface consistency are more important than unit price. Food safety, agriculture and environmental monitoring remain less developed but may become important expansion areas as electrochemical, graphene and portable molecular sensors reduce the cost and complexity of field testing.

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Regional Insights

North America represents the largest concentration of high-value Biosensor Chip demand and platform ownership. The region is particularly strong in biosensing analog front ends, semiconductor sequencing, nanopore systems, single-molecule analysis and life-science instrumentation. Its market structure supports premium products because customers place high value on analytical performance, validated workflows, installed-platform compatibility and recurring consumables. Europe has the broadest cluster of specialized SPR, QCM, electrochemical and microfluidic sensor-chip suppliers, supported by established pharmaceutical, biotechnology and analytical-instrument industries.

China is the fastest-expanding supply-side market, with growing capabilities in wearable-health ICs, sequencing flow cells, microarray diagnostics, nanopore technologies and domestic molecular-analysis platforms. Japan maintains advantages in precision sensors, optical devices and analytical instrumentation, while South Korea and Taiwan benefit from semiconductor manufacturing, consumer-electronics integration and advanced packaging. Southeast Asia plays an important role in wafer processing, assembly and testing, although the number of independent Biosensor Chip brands remains limited. Regional localization is expected to increase as medical, genomic and strategic semiconductor users seek more resilient supply chains and locally supported platforms.

Competitive Landscape Analysis

The Biosensor Chip market is fragmented at the overall industry level but relatively concentrated within individual technology and application segments. The verified core supplier pool contains 38 parent-level manufacturers spanning diversified semiconductor groups, vertically integrated sequencing and diagnostic platforms, specialist sensor-chip companies and custom manufacturing providers. Large semiconductor suppliers compete through mixed-signal design, low-power performance, manufacturing scale and qualification with global device customers. Platform owners differentiate through integrated combinations of sensor chips, instruments, chemistry, software and proprietary consumables, creating high switching costs and recurring revenue. Specialist suppliers compete through surface chemistry, microelectrode design, molecular-recognition expertise, application support and rapid customization. Competitive advantage therefore varies substantially by segment: cost and volume are critical in wearable sensing, installed-platform control is central in sequencing, and assay performance and surface reproducibility are decisive in pharmaceutical and

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diagnostic applications. Consolidation of specialist technologies into larger analytical-instrument groups is increasing, but emerging nanopore, graphene and single-molecule suppliers continue to expand the range of commercially relevant architectures.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Biosensor Chip Industry Forecast” looks at past sales and reviews total world Biosensor Chip sales in 2025, providing a comprehensive analysis by region and market sector of projected Biosensor Chip sales for 2026 through 2032. With Biosensor Chip sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Biosensor Chip industry.

This Insight Report provides a comprehensive analysis of the global Biosensor Chip landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Biosensor Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Biosensor Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Biosensor Chip and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Biosensor Chip.

This report presents a comprehensive overview, market shares, and growth opportunities of Biosensor Chip market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Disposable Sensor Chip

Reusable Sensor Chip

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Other

Segmentation by Transduction Mechanism:

Electrochemical

Field-effect Transistor

Optical or Photonic

Plasmonic

Nanopore

Other

Segmentation by Biorecognition Element:

Enzyme-based

Antibody or Antigen-based

Nucleic-acid Probe-based

Cell or Receptor-based

Other

Segmentation by Application:

Genomics and Molecular Sequencing

Proteomics and Biomolecular Analysis

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Drug Discovery

Food and Agricultural Testing

Environmental Monitoring

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

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France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Samsung Electronics Co., Ltd.

Thermo Fisher Scientific Inc.

Danaher Corporation

Texas Instruments Incorporated

STMicroelectronics N.V.

Analog Devices, Inc.

Renesas Electronics Corporation

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AMETEK, Inc.

Agilent Technologies, Inc.

Illumina, Inc.

Sartorius AG

ams-OSRAM AG

Bruker Corporation

HORIBA, Ltd.

Spectris plc

Randox Laboratories Ltd.

Shenzhen Goodix Technology Co., Ltd.

MGI Tech Co., Ltd.

Oxford Nanopore Technologies plc

Pacific Biosciences of California, Inc.

Universal Biosensors, Inc.

CapitalBio Corporation

Zomedica Corp.

GeneMind Biosciences Co., Ltd.

Qitan Technology (Chengdu) Co., Ltd.

Quantum-Si Incorporated

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Paragraf Limited

Nicoya Lifesciences Inc.

DNAe Group Holdings Limited

Attana AB

XanTec bioanalytics GmbH

Metrohm AG

Abionic SA

BioNavis Ltd.

Biosensing Instrument Inc.

MicruX Technologies S.L.

BVT Technologies, a.s.

Zimmer and Peacock Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Biosensor Chip market?

What factors are driving Biosensor Chip market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Biosensor Chip market opportunities vary by end market size?

How does Biosensor Chip break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global Biosensor Chip Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for Biosensor Chip by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for Biosensor Chip by Country/Region, 2021, 2025 & 2032
2.2 Biosensor Chip Segment by Type
  2.2.1 Disposable Sensor Chip
  2.2.2 Reusable Sensor Chip
  2.2.3 Other
  2.2.4 Biosensor Chip Sales by Type
    2.2.4.1 Global Biosensor Chip Sales Market Share by Type (2021-2026)
    2.2.4.2 Global Biosensor Chip Revenue and Market Share by Type (2021-2026)
    2.2.4.3 Global Biosensor Chip Sale Price by Type (2021-2026)
2.3 Biosensor Chip Segment by Transduction Mechanism
  2.3.1 Electrochemical
  2.3.2 Field-effect Transistor
  2.3.3 Optical or Photonic
  2.3.4 Plasmonic
  2.3.5 Nanopore
  2.3.6 Other
  2.3.7 Biosensor Chip Sales by Transduction Mechanism
    2.3.7.1 Global Biosensor Chip Sales Market Share by Transduction Mechanism (2021-2026)

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2.3.7.2 Global Biosensor Chip Revenue and Market Share by Transduction Mechanism (2021-2026)
2.3.7.3 Global Biosensor Chip Sale Price by Transduction Mechanism (2021-2026)
2.4 Biosensor Chip Segment by Biorecognition Element
2.4.1 Enzyme-based
2.4.2 Antibody or Antigen-based
2.4.3 Nucleic-acid Probe-based
2.4.4 Cell or Receptor-based
2.4.5 Other
2.4.6 Biosensor Chip Sales by Biorecognition Element
2.4.6.1 Global Biosensor Chip Sales Market Share by Biorecognition Element (2021-2026)
2.4.6.2 Global Biosensor Chip Revenue and Market Share by Biorecognition Element (2021-2026)
2.4.6.3 Global Biosensor Chip Sale Price by Biorecognition Element (2021-2026)
2.5 Biosensor Chip Segment by Application
2.5.1 Genomics and Molecular Sequencing
2.5.2 Proteomics and Biomolecular Analysis
2.5.3 Drug Discovery
2.5.4 Food and Agricultural Testing
2.5.5 Environmental Monitoring
2.5.6 Other
2.5.7 Biosensor Chip Sales by Application
2.5.7.1 Global Biosensor Chip Sale Market Share by Application (2021-2026)
2.5.7.2 Global Biosensor Chip Revenue and Market Share by Application (2021-2026)
2.5.7.3 Global Biosensor Chip Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Biosensor Chip Breakdown Data by Company
3.1.1 Global Biosensor Chip Annual Sales by Company (2021-2026)
3.1.2 Global Biosensor Chip Sales Market Share by Company (2021-2026)
3.2 Global Biosensor Chip Annual Revenue by Company (2021-2026)
3.2.1 Global Biosensor Chip Revenue by Company (2021-2026)
3.2.2 Global Biosensor Chip Revenue Market Share by Company (2021-2026)
3.3 Global Biosensor Chip Sale Price by Company
3.4 Key Manufacturers Biosensor Chip Producing Area Distribution, Sales Area, Product Type

+357 96 030922
info@marketpublishers.com

3.4.1 Key Manufacturers Biosensor Chip Product Location Distribution
3.4.2 Players Biosensor Chip Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR BIOSENSOR CHIP BY GEOGRAPHIC REGION

4.1 World Historic Biosensor Chip Market Size by Geographic Region (2021-2026)
4.1.1 Global Biosensor Chip Annual Sales by Geographic Region (2021-2026)
4.1.2 Global Biosensor Chip Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic Biosensor Chip Market Size by Country/Region (2021-2026)
4.2.1 Global Biosensor Chip Annual Sales by Country/Region (2021-2026)
4.2.2 Global Biosensor Chip Annual Revenue by Country/Region (2021-2026)
4.3 Americas Biosensor Chip Sales Growth
4.4 APAC Biosensor Chip Sales Growth
4.5 Europe Biosensor Chip Sales Growth
4.6 Middle East & Africa Biosensor Chip Sales Growth

5 AMERICAS

5.1 Americas Biosensor Chip Sales by Country
5.1.1 Americas Biosensor Chip Sales by Country (2021-2026)
5.1.2 Americas Biosensor Chip Revenue by Country (2021-2026)
5.2 Americas Biosensor Chip Sales by Type (2021-2026)
5.3 Americas Biosensor Chip Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC Biosensor Chip Sales by Region
6.1.1 APAC Biosensor Chip Sales by Region (2021-2026)
6.1.2 APAC Biosensor Chip Revenue by Region (2021-2026)
6.2 APAC Biosensor Chip Sales by Type (2021-2026)

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6.3 APAC Biosensor Chip Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

7 EUROPE

7.1 Europe Biosensor Chip by Country
  7.1.1 Europe Biosensor Chip Sales by Country (2021-2026)
  7.1.2 Europe Biosensor Chip Revenue by Country (2021-2026)
7.2 Europe Biosensor Chip Sales by Type (2021-2026)
7.3 Europe Biosensor Chip Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Biosensor Chip by Country
  8.1.1 Middle East & Africa Biosensor Chip Sales by Country (2021-2026)
  8.1.2 Middle East & Africa Biosensor Chip Revenue by Country (2021-2026)
8.2 Middle East & Africa Biosensor Chip Sales by Type (2021-2026)
8.3 Middle East & Africa Biosensor Chip Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks

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info@marketpublishers.com

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of Biosensor Chip
10.3 Manufacturing Process Analysis of Biosensor Chip
10.4 Industry Chain Structure of Biosensor Chip

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 Biosensor Chip Distributors
11.3 Biosensor Chip Customer

12 WORLD FORECAST REVIEW FOR BIOSENSOR CHIP BY GEOGRAPHIC REGION

12.1 Global Biosensor Chip Market Size Forecast by Region
  12.1.1 Global Biosensor Chip Forecast by Region (2027-2032)
  12.1.2 Global Biosensor Chip Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global Biosensor Chip Forecast by Type (2027-2032)
12.7 Global Biosensor Chip Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Samsung Electronics Co., Ltd.
  13.1.1 Samsung Electronics Co., Ltd. Company Information
  13.1.2 Samsung Electronics Co., Ltd. Biosensor Chip Product Portfolios and Specifications
  13.1.3 Samsung Electronics Co., Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 Samsung Electronics Co., Ltd. Main Business Overview

+357 96 030922
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13.1.5 Samsung Electronics Co., Ltd. Latest Developments
13.2 Thermo Fisher Scientific Inc.
13.2.1 Thermo Fisher Scientific Inc. Company Information
13.2.2 Thermo Fisher Scientific Inc. Biosensor Chip Product Portfolios and Specifications
13.2.3 Thermo Fisher Scientific Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.2.4 Thermo Fisher Scientific Inc. Main Business Overview
13.2.5 Thermo Fisher Scientific Inc. Latest Developments
13.3 Danaher Corporation
13.3.1 Danaher Corporation Company Information
13.3.2 Danaher Corporation Biosensor Chip Product Portfolios and Specifications
13.3.3 Danaher Corporation Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Danaher Corporation Main Business Overview
13.3.5 Danaher Corporation Latest Developments
13.4 Texas Instruments Incorporated
13.4.1 Texas Instruments Incorporated Company Information
13.4.2 Texas Instruments Incorporated Biosensor Chip Product Portfolios and Specifications
13.4.3 Texas Instruments Incorporated Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Texas Instruments Incorporated Main Business Overview
13.4.5 Texas Instruments Incorporated Latest Developments
13.5 STMicroelectronics N.V.
13.5.1 STMicroelectronics N.V. Company Information
13.5.2 STMicroelectronics N.V. Biosensor Chip Product Portfolios and Specifications
13.5.3 STMicroelectronics N.V. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 STMicroelectronics N.V. Main Business Overview
13.5.5 STMicroelectronics N.V. Latest Developments
13.6 Analog Devices, Inc.
13.6.1 Analog Devices, Inc. Company Information
13.6.2 Analog Devices, Inc. Biosensor Chip Product Portfolios and Specifications
13.6.3 Analog Devices, Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 Analog Devices, Inc. Main Business Overview
13.6.5 Analog Devices, Inc. Latest Developments
13.7 Renesas Electronics Corporation

+357 96 030922
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13.7.1 Renesas Electronics Corporation Company Information
13.7.2 Renesas Electronics Corporation Biosensor Chip Product Portfolios and Specifications
13.7.3 Renesas Electronics Corporation Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 Renesas Electronics Corporation Main Business Overview
13.7.5 Renesas Electronics Corporation Latest Developments
13.8 AMETEK, Inc.
13.8.1 AMETEK, Inc. Company Information
13.8.2 AMETEK, Inc. Biosensor Chip Product Portfolios and Specifications
13.8.3 AMETEK, Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 AMETEK, Inc. Main Business Overview
13.8.5 AMETEK, Inc. Latest Developments
13.9 Agilent Technologies, Inc.
13.9.1 Agilent Technologies, Inc. Company Information
13.9.2 Agilent Technologies, Inc. Biosensor Chip Product Portfolios and Specifications
13.9.3 Agilent Technologies, Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Agilent Technologies, Inc. Main Business Overview
13.9.5 Agilent Technologies, Inc. Latest Developments
13.10 Illumina, Inc.
13.10.1 Illumina, Inc. Company Information
13.10.2 Illumina, Inc. Biosensor Chip Product Portfolios and Specifications
13.10.3 Illumina, Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Illumina, Inc. Main Business Overview
13.10.5 Illumina, Inc. Latest Developments
13.11 Sartorius AG
13.11.1 Sartorius AG Company Information
13.11.2 Sartorius AG Biosensor Chip Product Portfolios and Specifications
13.11.3 Sartorius AG Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Sartorius AG Main Business Overview
13.11.5 Sartorius AG Latest Developments
13.12 ams-OSRAM AG
13.12.1 ams-OSRAM AG Company Information
13.12.2 ams-OSRAM AG Biosensor Chip Product Portfolios and Specifications
13.12.3 ams-OSRAM AG Biosensor Chip Sales, Revenue, Price and Gross Margin

+357 96 030922
info@marketpublishers.com

(2021-2026)
13.12.4 ams-OSRAM AG Main Business Overview
13.12.5 ams-OSRAM AG Latest Developments
13.13 Bruker Corporation
13.13.1 Bruker Corporation Company Information
13.13.2 Bruker Corporation Biosensor Chip Product Portfolios and Specifications
13.13.3 Bruker Corporation Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Bruker Corporation Main Business Overview
13.13.5 Bruker Corporation Latest Developments
13.14 HORIBA, Ltd.
13.14.1 HORIBA, Ltd. Company Information
13.14.2 HORIBA, Ltd. Biosensor Chip Product Portfolios and Specifications
13.14.3 HORIBA, Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 HORIBA, Ltd. Main Business Overview
13.14.5 HORIBA, Ltd. Latest Developments
13.15 Spectris plc
13.15.1 Spectris plc Company Information
13.15.2 Spectris plc Biosensor Chip Product Portfolios and Specifications
13.15.3 Spectris plc Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Spectris plc Main Business Overview
13.15.5 Spectris plc Latest Developments
13.16 Randox Laboratories Ltd.
13.16.1 Randox Laboratories Ltd. Company Information
13.16.2 Randox Laboratories Ltd. Biosensor Chip Product Portfolios and Specifications
13.16.3 Randox Laboratories Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Randox Laboratories Ltd. Main Business Overview
13.16.5 Randox Laboratories Ltd. Latest Developments
13.17 Shenzhen Goodix Technology Co., Ltd.
13.17.1 Shenzhen Goodix Technology Co., Ltd. Company Information
13.17.2 Shenzhen Goodix Technology Co., Ltd. Biosensor Chip Product Portfolios and Specifications
13.17.3 Shenzhen Goodix Technology Co., Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 Shenzhen Goodix Technology Co., Ltd. Main Business Overview

+357 96 030922
info@marketpublishers.com

13.17.5 Shenzhen Goodix Technology Co., Ltd. Latest Developments
13.18 MGI Tech Co., Ltd.
13.18.1 MGI Tech Co., Ltd. Company Information
13.18.2 MGI Tech Co., Ltd. Biosensor Chip Product Portfolios and Specifications
13.18.3 MGI Tech Co., Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 MGI Tech Co., Ltd. Main Business Overview
13.18.5 MGI Tech Co., Ltd. Latest Developments
13.19 Oxford Nanopore Technologies plc
13.19.1 Oxford Nanopore Technologies plc Company Information
13.19.2 Oxford Nanopore Technologies plc Biosensor Chip Product Portfolios and Specifications
13.19.3 Oxford Nanopore Technologies plc Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 Oxford Nanopore Technologies plc Main Business Overview
13.19.5 Oxford Nanopore Technologies plc Latest Developments
13.20 Pacific Biosciences of California, Inc.
13.20.1 Pacific Biosciences of California, Inc. Company Information
13.20.2 Pacific Biosciences of California, Inc. Biosensor Chip Product Portfolios and Specifications
13.20.3 Pacific Biosciences of California, Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 Pacific Biosciences of California, Inc. Main Business Overview
13.20.5 Pacific Biosciences of California, Inc. Latest Developments
13.21 Universal Biosensors, Inc.
13.21.1 Universal Biosensors, Inc. Company Information
13.21.2 Universal Biosensors, Inc. Biosensor Chip Product Portfolios and Specifications
13.21.3 Universal Biosensors, Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 Universal Biosensors, Inc. Main Business Overview
13.21.5 Universal Biosensors, Inc. Latest Developments
13.22 CapitalBio Corporation
13.22.1 CapitalBio Corporation Company Information
13.22.2 CapitalBio Corporation Biosensor Chip Product Portfolios and Specifications
13.22.3 CapitalBio Corporation Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 CapitalBio Corporation Main Business Overview
13.22.5 CapitalBio Corporation Latest Developments

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13.23 Zomedica Corp.
13.23.1 Zomedica Corp. Company Information
13.23.2 Zomedica Corp. Biosensor Chip Product Portfolios and Specifications
13.23.3 Zomedica Corp. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 Zomedica Corp. Main Business Overview
13.23.5 Zomedica Corp. Latest Developments
13.24 GeneMind Biosciences Co., Ltd.
13.24.1 GeneMind Biosciences Co., Ltd. Company Information
13.24.2 GeneMind Biosciences Co., Ltd. Biosensor Chip Product Portfolios and Specifications
13.24.3 GeneMind Biosciences Co., Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 GeneMind Biosciences Co., Ltd. Main Business Overview
13.24.5 GeneMind Biosciences Co., Ltd. Latest Developments
13.25 Qitan Technology (Chengdu) Co., Ltd.
13.25.1 Qitan Technology (Chengdu) Co., Ltd. Company Information
13.25.2 Qitan Technology (Chengdu) Co., Ltd. Biosensor Chip Product Portfolios and Specifications
13.25.3 Qitan Technology (Chengdu) Co., Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.25.4 Qitan Technology (Chengdu) Co., Ltd. Main Business Overview
13.25.5 Qitan Technology (Chengdu) Co., Ltd. Latest Developments
13.26 Quantum-Si Incorporated
13.26.1 Quantum-Si Incorporated Company Information
13.26.2 Quantum-Si Incorporated Biosensor Chip Product Portfolios and Specifications
13.26.3 Quantum-Si Incorporated Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.26.4 Quantum-Si Incorporated Main Business Overview
13.26.5 Quantum-Si Incorporated Latest Developments
13.27 Paragraf Limited
13.27.1 Paragraf Limited Company Information
13.27.2 Paragraf Limited Biosensor Chip Product Portfolios and Specifications
13.27.3 Paragraf Limited Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.27.4 Paragraf Limited Main Business Overview
13.27.5 Paragraf Limited Latest Developments
13.28 Nicoya Lifesciences Inc.

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13.28.1 Nicoya Lifesciences Inc. Company Information
13.28.2 Nicoya Lifesciences Inc. Biosensor Chip Product Portfolios and Specifications
13.28.3 Nicoya Lifesciences Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.28.4 Nicoya Lifesciences Inc. Main Business Overview
13.28.5 Nicoya Lifesciences Inc. Latest Developments
13.29 DNAe Group Holdings Limited
13.29.1 DNAe Group Holdings Limited Company Information
13.29.2 DNAe Group Holdings Limited Biosensor Chip Product Portfolios and Specifications
13.29.3 DNAe Group Holdings Limited Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.29.4 DNAe Group Holdings Limited Main Business Overview
13.29.5 DNAe Group Holdings Limited Latest Developments
13.30 Attana AB
13.30.1 Attana AB Company Information
13.30.2 Attana AB Biosensor Chip Product Portfolios and Specifications
13.30.3 Attana AB Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.30.4 Attana AB Main Business Overview
13.30.5 Attana AB Latest Developments
13.31 XanTec bioanalytics GmbH
13.31.1 XanTec bioanalytics GmbH Company Information
13.31.2 XanTec bioanalytics GmbH Biosensor Chip Product Portfolios and Specifications
13.31.3 XanTec bioanalytics GmbH Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.31.4 XanTec bioanalytics GmbH Main Business Overview
13.31.5 XanTec bioanalytics GmbH Latest Developments
13.32 Metrohm AG
13.32.1 Metrohm AG Company Information
13.32.2 Metrohm AG Biosensor Chip Product Portfolios and Specifications
13.32.3 Metrohm AG Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.32.4 Metrohm AG Main Business Overview
13.32.5 Metrohm AG Latest Developments
13.33 Abionic SA
13.33.1 Abionic SA Company Information
13.33.2 Abionic SA Biosensor Chip Product Portfolios and Specifications

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13.33.3 Abionic SA Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.33.4 Abionic SA Main Business Overview
13.33.5 Abionic SA Latest Developments
13.34 BioNavis Ltd.
13.34.1 BioNavis Ltd. Company Information
13.34.2 BioNavis Ltd. Biosensor Chip Product Portfolios and Specifications
13.34.3 BioNavis Ltd. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.34.4 BioNavis Ltd. Main Business Overview
13.34.5 BioNavis Ltd. Latest Developments
13.35 Biosensing Instrument Inc.
13.35.1 Biosensing Instrument Inc. Company Information
13.35.2 Biosensing Instrument Inc. Biosensor Chip Product Portfolios and Specifications
13.35.3 Biosensing Instrument Inc. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.35.4 Biosensing Instrument Inc. Main Business Overview
13.35.5 Biosensing Instrument Inc. Latest Developments
13.36 MicruX Technologies S.L.
13.36.1 MicruX Technologies S.L. Company Information
13.36.2 MicruX Technologies S.L. Biosensor Chip Product Portfolios and Specifications
13.36.3 MicruX Technologies S.L. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.36.4 MicruX Technologies S.L. Main Business Overview
13.36.5 MicruX Technologies S.L. Latest Developments
13.37 BVT Technologies, a.s.
13.37.1 BVT Technologies, a.s. Company Information
13.37.2 BVT Technologies, a.s. Biosensor Chip Product Portfolios and Specifications
13.37.3 BVT Technologies, a.s. Biosensor Chip Sales, Revenue, Price and Gross Margin (2021-2026)
13.37.4 BVT Technologies, a.s. Main Business Overview
13.37.5 BVT Technologies, a.s. Latest Developments
13.38 Zimmer and Peacock Ltd.
13.38.1 Zimmer and Peacock Ltd. Company Information
13.38.2 Zimmer and Peacock Ltd. Biosensor Chip Product Portfolios and Specifications
13.38.3 Zimmer and Peacock Ltd. Biosensor Chip Sales, Revenue, Price and Gross

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Margin (2021-2026)
13.38.4 Zimmer and Peacock Ltd. Main Business Overview
13.38.5 Zimmer and Peacock Ltd. Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. Biosensor Chip Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. Biosensor Chip Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Disposable Sensor Chip
Table 4. Major Players of Reusable Sensor Chip
Table 5. Major Players of Other
Table 6. Global Biosensor Chip Sales by Type (2021-2026) & (Million Units)
Table 7. Global Biosensor Chip Sales Market Share by Type (2021-2026)
Table 8. Global Biosensor Chip Revenue by Type (2021-2026) & ($ million)
Table 9. Global Biosensor Chip Revenue Market Share by Type (2021-2026)
Table 10. Global Biosensor Chip Sale Price by Type (2021-2026) & (US$/Unit)
Table 11. Major Players of Electrochemical
Table 12. Major Players of Field-effect Transistor
Table 13. Major Players of Optical or Photonic
Table 14. Major Players of Plasmonic
Table 15. Major Players of Nanopore
Table 16. Major Players of Other
Table 17. Global Biosensor Chip Sales by Transduction Mechanism (2021-2026) & (Million Units)
Table 18. Global Biosensor Chip Sales Market Share by Transduction Mechanism (2021-2026)
Table 19. Global Biosensor Chip Revenue by Transduction Mechanism (2021-2026) & ($ million)
Table 20. Global Biosensor Chip Revenue Market Share by Transduction Mechanism (2021-2026)
Table 21. Global Biosensor Chip Sale Price by Transduction Mechanism (2021-2026) & (US$/Unit)
Table 22. Major Players of Enzyme-based
Table 23. Major Players of Antibody or Antigen-based
Table 24. Major Players of Nucleic-acid Probe-based
Table 25. Major Players of Cell or Receptor-based
Table 26. Major Players of Other
Table 27. Global Biosensor Chip Sales by Biorecognition Element (2021-2026) & (Million Units)

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Table 28. Global Biosensor Chip Sales Market Share by Biorecognition Element (2021-2026)
Table 29. Global Biosensor Chip Revenue by Biorecognition Element (2021-2026) & ($ million)
Table 30. Global Biosensor Chip Revenue Market Share by Biorecognition Element (2021-2026)
Table 31. Global Biosensor Chip Sale Price by Biorecognition Element (2021-2026) & (US$/Unit)
Table 32. Global Biosensor Chip Sale by Application (2021-2026) & (Million Units)
Table 33. Global Biosensor Chip Sale Market Share by Application (2021-2026)
Table 34. Global Biosensor Chip Revenue by Application (2021-2026) & ($ million)
Table 35. Global Biosensor Chip Revenue Market Share by Application (2021-2026)
Table 36. Global Biosensor Chip Sale Price by Application (2021-2026) & (US$/Unit)
Table 37. Global Biosensor Chip Sales by Company (2021-2026) & (Million Units)
Table 38. Global Biosensor Chip Sales Market Share by Company (2021-2026)
Table 39. Global Biosensor Chip Revenue by Company (2021-2026) & ($ millions)
Table 40. Global Biosensor Chip Revenue Market Share by Company (2021-2026)
Table 41. Global Biosensor Chip Sale Price by Company (2021-2026) & (US$/Unit)
Table 42. Key Manufacturers Biosensor Chip Producing Area Distribution and Sales Area
Table 43. Players Biosensor Chip Products Offered
Table 44. Biosensor Chip Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 45. New Products and Potential Entrants
Table 46. Market M&A Activity & Strategy
Table 47. Global Biosensor Chip Sales by Geographic Region (2021-2026) & (Million Units)
Table 48. Global Biosensor Chip Sales Market Share Geographic Region (2021-2026)
Table 49. Global Biosensor Chip Revenue by Geographic Region (2021-2026) & ($ millions)
Table 50. Global Biosensor Chip Revenue Market Share by Geographic Region (2021-2026)
Table 51. Global Biosensor Chip Sales by Country/Region (2021-2026) & (Million Units)
Table 52. Global Biosensor Chip Sales Market Share by Country/Region (2021-2026)
Table 53. Global Biosensor Chip Revenue by Country/Region (2021-2026) & ($ millions)
Table 54. Global Biosensor Chip Revenue Market Share by Country/Region (2021-2026)
Table 55. Americas Biosensor Chip Sales by Country (2021-2026) & (Million Units)
Table 56. Americas Biosensor Chip Sales Market Share by Country (2021-2026)

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Table 57. Americas Biosensor Chip Revenue by Country (2021-2026) & ($ millions)
Table 58. Americas Biosensor Chip Sales by Type (2021-2026) & (Million Units)
Table 59. Americas Biosensor Chip Sales by Application (2021-2026) & (Million Units)
Table 60. APAC Biosensor Chip Sales by Region (2021-2026) & (Million Units)
Table 61. APAC Biosensor Chip Sales Market Share by Region (2021-2026)
Table 62. APAC Biosensor Chip Revenue by Region (2021-2026) & ($ millions)
Table 63. APAC Biosensor Chip Sales by Type (2021-2026) & (Million Units)
Table 64. APAC Biosensor Chip Sales by Application (2021-2026) & (Million Units)
Table 65. Europe Biosensor Chip Sales by Country (2021-2026) & (Million Units)
Table 66. Europe Biosensor Chip Revenue by Country (2021-2026) & ($ millions)
Table 67. Europe Biosensor Chip Sales by Type (2021-2026) & (Million Units)
Table 68. Europe Biosensor Chip Sales by Application (2021-2026) & (Million Units)
Table 69. Middle East & Africa Biosensor Chip Sales by Country (2021-2026) & (Million Units)
Table 70. Middle East & Africa Biosensor Chip Revenue Market Share by Country (2021-2026)
Table 71. Middle East & Africa Biosensor Chip Sales by Type (2021-2026) & (Million Units)
Table 72. Middle East & Africa Biosensor Chip Sales by Application (2021-2026) & (Million Units)
Table 73. Key Market Drivers & Growth Opportunities of Biosensor Chip
Table 74. Key Market Challenges & Risks of Biosensor Chip
Table 75. Key Industry Trends of Biosensor Chip
Table 76. Biosensor Chip Raw Material
Table 77. Key Suppliers of Raw Materials
Table 78. Biosensor Chip Distributors List
Table 79. Biosensor Chip Customer List
Table 80. Global Biosensor Chip Sales Forecast by Region (2027-2032) & (Million Units)
Table 81. Global Biosensor Chip Revenue Forecast by Region (2027-2032) & ($ millions)
Table 82. Americas Biosensor Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 83. Americas Biosensor Chip Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. APAC Biosensor Chip Sales Forecast by Region (2027-2032) & (Million Units)
Table 85. APAC Biosensor Chip Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 86. Europe Biosensor Chip Sales Forecast by Country (2027-2032) & (Million

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Units)
Table 87. Europe Biosensor Chip Revenue Forecast by Country (2027-2032) & ($ millions)
Table 88. Middle East & Africa Biosensor Chip Sales Forecast by Country (2027-2032) & (Million Units)
Table 89. Middle East & Africa Biosensor Chip Revenue Forecast by Country (2027-2032) & ($ millions)
Table 90. Global Biosensor Chip Sales Forecast by Type (2027-2032) & (Million Units)
Table 91. Global Biosensor Chip Revenue Forecast by Type (2027-2032) & ($ millions)
Table 92. Global Biosensor Chip Sales Forecast by Application (2027-2032) & (Million Units)
Table 93. Global Biosensor Chip Revenue Forecast by Application (2027-2032) & ($ millions)
Table 94. Samsung Electronics Co., Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 95. Samsung Electronics Co., Ltd. Biosensor Chip Product Portfolios and Specifications
Table 96. Samsung Electronics Co., Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 97. Samsung Electronics Co., Ltd. Main Business
Table 98. Samsung Electronics Co., Ltd. Latest Developments
Table 99. Thermo Fisher Scientific Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 100. Thermo Fisher Scientific Inc. Biosensor Chip Product Portfolios and Specifications
Table 101. Thermo Fisher Scientific Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 102. Thermo Fisher Scientific Inc. Main Business
Table 103. Thermo Fisher Scientific Inc. Latest Developments
Table 104. Danaher Corporation Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 105. Danaher Corporation Biosensor Chip Product Portfolios and Specifications
Table 106. Danaher Corporation Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 107. Danaher Corporation Main Business
Table 108. Danaher Corporation Latest Developments
Table 109. Texas Instruments Incorporated Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 110. Texas Instruments Incorporated Biosensor Chip Product Portfolios and

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Specifications
Table 111. Texas Instruments Incorporated Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 112. Texas Instruments Incorporated Main Business
Table 113. Texas Instruments Incorporated Latest Developments
Table 114. STMicroelectronics N.V. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 115. STMicroelectronics N.V. Biosensor Chip Product Portfolios and Specifications
Table 116. STMicroelectronics N.V. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 117. STMicroelectronics N.V. Main Business
Table 118. STMicroelectronics N.V. Latest Developments
Table 119. Analog Devices, Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 120. Analog Devices, Inc. Biosensor Chip Product Portfolios and Specifications
Table 121. Analog Devices, Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 122. Analog Devices, Inc. Main Business
Table 123. Analog Devices, Inc. Latest Developments
Table 124. Renesas Electronics Corporation Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 125. Renesas Electronics Corporation Biosensor Chip Product Portfolios and Specifications
Table 126. Renesas Electronics Corporation Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 127. Renesas Electronics Corporation Main Business
Table 128. Renesas Electronics Corporation Latest Developments
Table 129. AMETEK, Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 130. AMETEK, Inc. Biosensor Chip Product Portfolios and Specifications
Table 131. AMETEK, Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 132. AMETEK, Inc. Main Business
Table 133. AMETEK, Inc. Latest Developments
Table 134. Agilent Technologies, Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 135. Agilent Technologies, Inc. Biosensor Chip Product Portfolios and Specifications

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Table 136. Agilent Technologies, Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 137. Agilent Technologies, Inc. Main Business
Table 138. Agilent Technologies, Inc. Latest Developments
Table 139. Illumina, Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 140. Illumina, Inc. Biosensor Chip Product Portfolios and Specifications
Table 141. Illumina, Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 142. Illumina, Inc. Main Business
Table 143. Illumina, Inc. Latest Developments
Table 144. Sartorius AG Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 145. Sartorius AG Biosensor Chip Product Portfolios and Specifications
Table 146. Sartorius AG Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 147. Sartorius AG Main Business
Table 148. Sartorius AG Latest Developments
Table 149. ams-OSRAM AG Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 150. ams-OSRAM AG Biosensor Chip Product Portfolios and Specifications
Table 151. ams-OSRAM AG Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 152. ams-OSRAM AG Main Business
Table 153. ams-OSRAM AG Latest Developments
Table 154. Bruker Corporation Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 155. Bruker Corporation Biosensor Chip Product Portfolios and Specifications
Table 156. Bruker Corporation Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 157. Bruker Corporation Main Business
Table 158. Bruker Corporation Latest Developments
Table 159. HORIBA, Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 160. HORIBA, Ltd. Biosensor Chip Product Portfolios and Specifications
Table 161. HORIBA, Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 162. HORIBA, Ltd. Main Business
Table 163. HORIBA, Ltd. Latest Developments

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Table 164. Spectris plc Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 165. Spectris plc Biosensor Chip Product Portfolios and Specifications
Table 166. Spectris plc Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 167. Spectris plc Main Business
Table 168. Spectris plc Latest Developments
Table 169. Randox Laboratories Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 170. Randox Laboratories Ltd. Biosensor Chip Product Portfolios and Specifications
Table 171. Randox Laboratories Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 172. Randox Laboratories Ltd. Main Business
Table 173. Randox Laboratories Ltd. Latest Developments
Table 174. Shenzhen Goodix Technology Co., Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 175. Shenzhen Goodix Technology Co., Ltd. Biosensor Chip Product Portfolios and Specifications
Table 176. Shenzhen Goodix Technology Co., Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 177. Shenzhen Goodix Technology Co., Ltd. Main Business
Table 178. Shenzhen Goodix Technology Co., Ltd. Latest Developments
Table 179. MGI Tech Co., Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 180. MGI Tech Co., Ltd. Biosensor Chip Product Portfolios and Specifications
Table 181. MGI Tech Co., Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 182. MGI Tech Co., Ltd. Main Business
Table 183. MGI Tech Co., Ltd. Latest Developments
Table 184. Oxford Nanopore Technologies plc Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 185. Oxford Nanopore Technologies plc Biosensor Chip Product Portfolios and Specifications
Table 186. Oxford Nanopore Technologies plc Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 187. Oxford Nanopore Technologies plc Main Business
Table 188. Oxford Nanopore Technologies plc Latest Developments
Table 189. Pacific Biosciences of California, Inc. Basic Information, Biosensor Chip

+357 96 030922
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Manufacturing Base, Sales Area and Its Competitors
Table 190. Pacific Biosciences of California, Inc. Biosensor Chip Product Portfolios and Specifications
Table 191. Pacific Biosciences of California, Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 192. Pacific Biosciences of California, Inc. Main Business
Table 193. Pacific Biosciences of California, Inc. Latest Developments
Table 194. Universal Biosensors, Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 195. Universal Biosensors, Inc. Biosensor Chip Product Portfolios and Specifications
Table 196. Universal Biosensors, Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 197. Universal Biosensors, Inc. Main Business
Table 198. Universal Biosensors, Inc. Latest Developments
Table 199. CapitalBio Corporation Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 200. CapitalBio Corporation Biosensor Chip Product Portfolios and Specifications
Table 201. CapitalBio Corporation Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 202. CapitalBio Corporation Main Business
Table 203. CapitalBio Corporation Latest Developments
Table 204. Zomedica Corp. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 205. Zomedica Corp. Biosensor Chip Product Portfolios and Specifications
Table 206. Zomedica Corp. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 207. Zomedica Corp. Main Business
Table 208. Zomedica Corp. Latest Developments
Table 209. GeneMind Biosciences Co., Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 210. GeneMind Biosciences Co., Ltd. Biosensor Chip Product Portfolios and Specifications
Table 211. GeneMind Biosciences Co., Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 212. GeneMind Biosciences Co., Ltd. Main Business
Table 213. GeneMind Biosciences Co., Ltd. Latest Developments
Table 214. Qitan Technology (Chengdu) Co., Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors

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Table 215. Qitan Technology (Chengdu) Co., Ltd. Biosensor Chip Product Portfolios and Specifications
Table 216. Qitan Technology (Chengdu) Co., Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 217. Qitan Technology (Chengdu) Co., Ltd. Main Business
Table 218. Qitan Technology (Chengdu) Co., Ltd. Latest Developments
Table 219. Quantum-Si Incorporated Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 220. Quantum-Si Incorporated Biosensor Chip Product Portfolios and Specifications
Table 221. Quantum-Si Incorporated Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 222. Quantum-Si Incorporated Main Business
Table 223. Quantum-Si Incorporated Latest Developments
Table 224. Paragraf Limited Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 225. Paragraf Limited Biosensor Chip Product Portfolios and Specifications
Table 226. Paragraf Limited Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 227. Paragraf Limited Main Business
Table 228. Paragraf Limited Latest Developments
Table 229. Nicoya Lifesciences Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 230. Nicoya Lifesciences Inc. Biosensor Chip Product Portfolios and Specifications
Table 231. Nicoya Lifesciences Inc. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 232. Nicoya Lifesciences Inc. Main Business
Table 233. Nicoya Lifesciences Inc. Latest Developments
Table 234. DNAe Group Holdings Limited Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 235. DNAe Group Holdings Limited Biosensor Chip Product Portfolios and Specifications
Table 236. DNAe Group Holdings Limited Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 237. DNAe Group Holdings Limited Main Business
Table 238. DNAe Group Holdings Limited Latest Developments
Table 239. Attana AB Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors

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Table 240. Attana AB Biosensor Chip Product Portfolios and Specifications
Table 241. Attana AB Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 242. Attana AB Main Business
Table 243. Attana AB Latest Developments
Table 244. XanTec bioanalytics GmbH Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 245. XanTec bioanalytics GmbH Biosensor Chip Product Portfolios and Specifications
Table 246. XanTec bioanalytics GmbH Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 247. XanTec bioanalytics GmbH Main Business
Table 248. XanTec bioanalytics GmbH Latest Developments
Table 249. Metrohm AG Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 250. Metrohm AG Biosensor Chip Product Portfolios and Specifications
Table 251. Metrohm AG Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 252. Metrohm AG Main Business
Table 253. Metrohm AG Latest Developments
Table 254. Abionic SA Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 255. Abionic SA Biosensor Chip Product Portfolios and Specifications
Table 256. Abionic SA Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 257. Abionic SA Main Business
Table 258. Abionic SA Latest Developments
Table 259. BioNavis Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 260. BioNavis Ltd. Biosensor Chip Product Portfolios and Specifications
Table 261. BioNavis Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 262. BioNavis Ltd. Main Business
Table 263. BioNavis Ltd. Latest Developments
Table 264. Biosensing Instrument Inc. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 265. Biosensing Instrument Inc. Biosensor Chip Product Portfolios and Specifications
Table 266. Biosensing Instrument Inc. Biosensor Chip Sales (Million Units), Revenue ($

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Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 267. Biosensing Instrument Inc. Main Business
Table 268. Biosensing Instrument Inc. Latest Developments
Table 269. MicruX Technologies S.L. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 270. MicruX Technologies S.L. Biosensor Chip Product Portfolios and Specifications
Table 271. MicruX Technologies S.L. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 272. MicruX Technologies S.L. Main Business
Table 273. MicruX Technologies S.L. Latest Developments
Table 274. BVT Technologies, a.s. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 275. BVT Technologies, a.s. Biosensor Chip Product Portfolios and Specifications
Table 276. BVT Technologies, a.s. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 277. BVT Technologies, a.s. Main Business
Table 278. BVT Technologies, a.s. Latest Developments
Table 279. Zimmer and Peacock Ltd. Basic Information, Biosensor Chip Manufacturing Base, Sales Area and Its Competitors
Table 280. Zimmer and Peacock Ltd. Biosensor Chip Product Portfolios and Specifications
Table 281. Zimmer and Peacock Ltd. Biosensor Chip Sales (Million Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 282. Zimmer and Peacock Ltd. Main Business
Table 283. Zimmer and Peacock Ltd. Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of Biosensor Chip
Figure 2. Biosensor Chip Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global Biosensor Chip Sales Growth Rate 2021-2032 (Million Units)
Figure 7. Global Biosensor Chip Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. Biosensor Chip Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. Biosensor Chip Sales Market Share by Country/Region (2025)
Figure 10. Biosensor Chip Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Disposable Sensor Chip
Figure 12. Product Picture of Reusable Sensor Chip
Figure 13. Product Picture of Other
Figure 14. Global Biosensor Chip Sales Market Share by Type in 2026
Figure 15. Global Biosensor Chip Revenue Market Share by Type (2021-2026)
Figure 16. Product Picture of Electrochemical
Figure 17. Product Picture of Field-effect Transistor
Figure 18. Product Picture of Optical or Photonic
Figure 19. Product Picture of Plasmonic
Figure 20. Product Picture of Nanopore
Figure 21. Product Picture of Other
Figure 22. Global Biosensor Chip Sales Market Share by Transduction Mechanism in 2026
Figure 23. Global Biosensor Chip Revenue Market Share by Transduction Mechanism (2021-2026)
Figure 24. Product Picture of Enzyme-based
Figure 25. Product Picture of Antibody or Antigen-based
Figure 26. Product Picture of Nucleic-acid Probe-based
Figure 27. Product Picture of Cell or Receptor-based
Figure 28. Product Picture of Other
Figure 29. Global Biosensor Chip Sales Market Share by Biorecognition Element in 2026
Figure 30. Global Biosensor Chip Revenue Market Share by Biorecognition Element (2021-2026)

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Figure 31. Biosensor Chip Consumed in Genomics and Molecular Sequencing
Figure 32. Global Biosensor Chip Market: Genomics and Molecular Sequencing (2021-2026) & (Million Units)
Figure 33. Biosensor Chip Consumed in Proteomics and Biomolecular Analysis
Figure 34. Global Biosensor Chip Market: Proteomics and Biomolecular Analysis (2021-2026) & (Million Units)
Figure 35. Biosensor Chip Consumed in Drug Discovery
Figure 36. Global Biosensor Chip Market: Drug Discovery (2021-2026) & (Million Units)
Figure 37. Biosensor Chip Consumed in Food and Agricultural Testing
Figure 38. Global Biosensor Chip Market: Food and Agricultural Testing (2021-2026) & (Million Units)
Figure 39. Biosensor Chip Consumed in Environmental Monitoring
Figure 40. Global Biosensor Chip Market: Environmental Monitoring (2021-2026) & (Million Units)
Figure 41. Biosensor Chip Consumed in Other
Figure 42. Global Biosensor Chip Market: Other (2021-2026) & (Million Units)
Figure 43. Global Biosensor Chip Sale Market Share by Application (2025)
Figure 44. Global Biosensor Chip Revenue Market Share by Application in 2025
Figure 45. Biosensor Chip Sales by Company in 2025 (Million Units)
Figure 46. Global Biosensor Chip Sales Market Share by Company in 2025
Figure 47. Biosensor Chip Revenue by Company in 2025 ($ millions)
Figure 48. Global Biosensor Chip Revenue Market Share by Company in 2025
Figure 49. Global Biosensor Chip Sales Market Share by Geographic Region (2021-2026)
Figure 50. Global Biosensor Chip Revenue Market Share by Geographic Region in 2025
Figure 51. Americas Biosensor Chip Sales 2021-2026 (Million Units)
Figure 52. Americas Biosensor Chip Revenue 2021-2026 ($ millions)
Figure 53. APAC Biosensor Chip Sales 2021-2026 (Million Units)
Figure 54. APAC Biosensor Chip Revenue 2021-2026 ($ millions)
Figure 55. Europe Biosensor Chip Sales 2021-2026 (Million Units)
Figure 56. Europe Biosensor Chip Revenue 2021-2026 ($ millions)
Figure 57. Middle East & Africa Biosensor Chip Sales 2021-2026 (Million Units)
Figure 58. Middle East & Africa Biosensor Chip Revenue 2021-2026 ($ millions)
Figure 59. Americas Biosensor Chip Sales Market Share by Country in 2025
Figure 60. Americas Biosensor Chip Revenue Market Share by Country (2021-2026)
Figure 61. Americas Biosensor Chip Sales Market Share by Type (2021-2026)
Figure 62. Americas Biosensor Chip Sales Market Share by Application (2021-2026)
Figure 63. United States Biosensor Chip Revenue Growth 2021-2026 ($ millions)

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Figure 64. Canada Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 65. Mexico Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 66. Brazil Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 67. APAC Biosensor Chip Sales Market Share by Region in 2025
Figure 68. APAC Biosensor Chip Revenue Market Share by Region (2021-2026)
Figure 69. APAC Biosensor Chip Sales Market Share by Type (2021-2026)
Figure 70. APAC Biosensor Chip Sales Market Share by Application (2021-2026)
Figure 71. China Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 72. Japan Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 73. South Korea Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 74. Southeast Asia Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 75. India Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 76. Australia Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 77. China Taiwan Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 78. Europe Biosensor Chip Sales Market Share by Country in 2025
Figure 79. Europe Biosensor Chip Revenue Market Share by Country (2021-2026)
Figure 80. Europe Biosensor Chip Sales Market Share by Type (2021-2026)
Figure 81. Europe Biosensor Chip Sales Market Share by Application (2021-2026)
Figure 82. Germany Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 83. France Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 84. UK Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 85. Italy Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 86. Russia Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 87. Middle East & Africa Biosensor Chip Sales Market Share by Country (2021-2026)
Figure 88. Middle East & Africa Biosensor Chip Sales Market Share by Type (2021-2026)
Figure 89. Middle East & Africa Biosensor Chip Sales Market Share by Application (2021-2026)
Figure 90. Egypt Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 91. South Africa Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 92. Israel Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 93. Turkey Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 94. GCC Countries Biosensor Chip Revenue Growth 2021-2026 ($ millions)
Figure 95. Manufacturing Cost Structure Analysis of Biosensor Chip in 2026
Figure 96. Manufacturing Process Analysis of Biosensor Chip
Figure 97. Industry Chain Structure of Biosensor Chip
Figure 98. Channels of Distribution
Figure 99. Global Biosensor Chip Sales Market Forecast by Region (2027-2032)

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Figure 100. Global Biosensor Chip Revenue Market Share Forecast by Region (2027-2032)
Figure 101. Global Biosensor Chip Sales Market Share Forecast by Type (2027-2032)
Figure 102. Global Biosensor Chip Revenue Market Share Forecast by Type (2027-2032)
Figure 103. Global Biosensor Chip Sales Market Share Forecast by Application (2027-2032)
Figure 104. Global Biosensor Chip Revenue Market Share Forecast by Application (2027-2032)

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