

Global Cell-Free DNA Blood Collection Tubes Market Growth 2026-2032

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Abstracts

The global Cell-Free DNA Blood Collection Tubes market size is predicted to grow from US\$ 111 million in 2025 to US\$ 180 million in 2032; it is expected to grow at a CAGR of 7.4% from 2026 to 2032.

Cell-Free DNA Blood Collection Tubes are specialized evacuated blood collection consumables designed for direct collection, stabilization, storage, and transportation of human whole blood prior to cell-free DNA analysis. These products combine anticoagulation with dedicated cell-stabilizing and nucleic-acid-preserving formulations to reduce leukocyte lysis, genomic DNA release, nuclease-driven degradation, and other pre-analytical changes that can alter plasma cfDNA profiles. Commercial products are typically supplied as approximately 5–10 mL blood collection tubes in glass or polymer formats, with 10 mL-class tubes representing a widely adopted configuration. Depending on product formulation and regulatory status, stabilized whole blood can generally be transported and stored for several days at ambient or controlled temperatures before plasma separation. The market primarily covers dedicated cfDNA preservation tubes and multi-analyte cell-free nucleic acid preservation tubes used in non-invasive prenatal testing, oncology liquid biopsy, molecular residual disease monitoring, therapy selection, companion diagnostics, transplant rejection monitoring, and related molecular testing workflows. The product is positioned at the pre-analytical stage of the molecular diagnostics and liquid biopsy industry chain, where sample integrity directly affects downstream extraction, PCR, digital PCR, and next-generation sequencing performance.

Key Findings

Global sales volume was approximately 25.5 million tubes in 2025 and is estimated at

about 27.3 million tubes in 2026

The weighted global manufacturer-level ASP was approximately US\$4.42 per tube in 2025

NIPT accounted for approximately 52% of 2025 unit demand and remained the largest application

Oncology liquid biopsy and MRD represented approximately 27% of unit demand and are gaining structural importance

China has the largest concentration of identified core manufacturing companies in the study database

Market Trends

The Cell-Free DNA Blood Collection Tubes market is shifting from basic blood collection toward increasingly standardized pre-analytical sample management. Product development is focused on extending whole-blood stability, reducing genomic DNA contamination caused by nucleated-cell lysis, improving tolerance to transportation temperature variation, and supporting decentralized sample collection followed by centralized molecular testing. Established products such as 10 mL-class dedicated cfDNA tubes remain central to clinical workflows, while multi-analyte preservation products capable of stabilizing cfDNA together with other circulating nucleic acids are broadening the technical scope of liquid biopsy sample collection. Another structural change is the transition from research-oriented products toward regulated IVD configurations validated with specific downstream diagnostic workflows. This is increasing the importance of compatibility studies, stability validation, automated plasma-processing workflows, and integration with PCR and next-generation sequencing platforms. The market is therefore evolving from a relatively simple specialty consumable category into a regulated pre-analytical component of complete molecular diagnostic workflows.

Market Dynamics

Drivers

Growth is primarily supported by rising adoption of non-invasive prenatal testing, oncology liquid biopsy, molecular residual disease testing, precision therapy selection,

and donor-derived cfDNA monitoring after organ transplantation. These applications require relatively consistent plasma cfDNA quality even when blood cannot be processed immediately after collection. Specialized stabilization tubes therefore address a fundamental pre-analytical problem by reducing leukocyte lysis and genomic DNA contamination during transportation and temporary storage. Expansion of centralized molecular laboratories also increases the need to transport samples over longer distances from hospitals and collection sites to testing centers. In oncology, rapidly increasing clinical MRD testing further supports demand for standardized blood collection: Natera processed approximately 800,800 oncology tests in 2025, including about 769,700 clinical MRD tests, while CareDx reported approximately 200,000 testing-service tests in transplantation-related diagnostics during the same year.

Restraints

The principal restraint is the substantial price premium over conventional EDTA blood collection tubes. Stabilizer formulation, specialized filling processes, quality control, shelf-life validation, sterilization, regulatory registration, and clinical workflow validation all add manufacturing and commercialization costs. At the same time, major testing laboratories purchase tubes in large volumes and can exert downward pressure on manufacturer-level pricing, while lower-cost Asian suppliers are increasing price competition. The category also faces substitution in workflows where blood can be processed rapidly after collection, because standard EDTA tubes can remain economically attractive when plasma separation occurs within a tightly controlled time window. As a result, the economic advantage of specialized cfDNA preservation tubes is strongest in distributed collection, sample shipping, centralized testing, and workflows requiring longer pre-analytical stability.

Opportunities

The most attractive incremental opportunities are emerging from oncology applications where repeated blood collection is becoming embedded in longitudinal patient management rather than being limited to a single diagnostic event. Molecular residual disease, recurrence surveillance, treatment-response monitoring, and companion diagnostic workflows can create multiple blood draws per patient and therefore generate higher recurring tube consumption than many one-time screening applications. Transplant medicine also provides a recurring-use model because donor-derived cfDNA testing may be performed repeatedly after transplantation. Additional opportunities are developing in emerging markets where NIPT and oncology sequencing capacity are expanding but centralized testing infrastructure still requires reliable transportation of whole-blood samples. Manufacturers able to combine competitive pricing with validated

multi-day stability, regulatory compliance, automated production, and compatibility with major downstream extraction and sequencing workflows are positioned to capture a larger share of this incremental demand.

Challenges

The industry continues to face technical and commercial standardization challenges. Stability claims are not directly comparable across products because storage temperature, duration, sample handling conditions, analytical methods, and regulatory versions vary by manufacturer. For example, PAXgene Blood ccfDNA Tube documentation supports stabilization for up to 10 days at temperatures up to 25°C, while other products use different temperature-duration combinations. Clinical laboratories therefore evaluate products based not only on nominal preservation time but also on hemolysis, genomic DNA contamination, cfDNA yield, fragment-size distribution, downstream assay performance, and workflow compatibility. Another challenge is the relatively concentrated purchasing structure of large NIPT and oncology laboratories, which can make supplier qualification highly valuable but also increase customer concentration risk. New entrants must consequently overcome both manufacturing barriers and lengthy validation cycles before achieving meaningful clinical-volume adoption.

Industry Chain Analysis

The upstream portion of the Cell-Free DNA Blood Collection Tubes industry includes medical-grade glass and polymer tube materials, elastomer closures, safety caps, labels, anticoagulants such as EDTA, proprietary cell-stabilization formulations, packaging materials, molding equipment, vacuum-forming and filling equipment, sterilization services, and quality-control materials. The technical differentiation of the product is concentrated less in the basic tube body than in stabilizer chemistry, controlled reagent filling, vacuum consistency, tube-closure performance, sterilization, shelf-life control, and the ability to maintain plasma cfDNA integrity under transportation conditions. These factors distinguish specialized cfDNA tubes from conventional evacuated blood collection tubes.

The midstream consists of formulation development, tube molding or forming, stabilizer filling, vacuum preparation, closure assembly, labeling, sterilization, stability testing, regulatory registration, and commercial supply. Large blood collection manufacturers benefit from automated production scale and established quality systems, while specialist molecular-diagnostics suppliers compete through proprietary preservation

chemistry and assay-specific validation. Downstream demand is generated by NIPT laboratories, oncology liquid biopsy providers, transplant diagnostics, hospital molecular laboratories, independent reference laboratories, pharmaceutical clinical trials, and research programs. Value creation progressively shifts from relatively standardized tube-body manufacturing toward preservation chemistry, validated pre-analytical performance, regulatory status, and integration into high-value diagnostic workflows. This explains why the selling price of specialized cfDNA tubes remains substantially above that of conventional blood collection tubes despite relatively low material content.

Segment Insights

Dedicated cfDNA Preservation Tubes constitute the mainstream product structure because most established clinical workflows require a clearly validated solution for preserving plasma cfDNA while minimizing the release of intracellular genomic DNA. Multi-Analyte Cell-Free Nucleic Acid Preservation Tubes form a smaller but strategically relevant segment, particularly in research and emerging liquid biopsy workflows seeking to recover cfDNA together with cfRNA or other circulating molecular targets from the same specimen. In terms of specifications, 10 mL-class tubes remain an important commercial format, although smaller and intermediate-volume products are also available. Plastic tubes are increasingly common due to transportation safety and manufacturing scalability, while glass tubes continue to be supplied by several manufacturers.

By application, NIPT accounted for approximately 52% of global unit demand in 2025 and remained the largest consumption segment. Oncology liquid biopsy, including cancer detection, therapy selection, companion diagnostics, and MRD monitoring, represented approximately 27% and has become the most important source of structural demand diversification. Transplant-related cfDNA monitoring accounted for a smaller share, while pharmaceutical research, clinical trials, infectious disease applications, and other molecular testing workflows formed the remaining demand base. The application mix is expected to gradually shift toward oncology and other repeated-testing scenarios as cfDNA testing moves beyond prenatal screening into longitudinal disease management.

Downstream Market Opportunities

The largest established downstream opportunity remains NIPT, where high testing volumes and centralized sequencing workflows create stable recurring demand for standardized blood collection. The strongest incremental opportunity, however, is

developing in oncology. MRD surveillance, recurrence monitoring, treatment-response assessment, molecular profiling, and companion diagnostics can require repeated sampling during the patient journey, creating higher lifetime tube consumption per patient. Transplant monitoring provides a similar recurring-demand mechanism, while pharmaceutical clinical trials create additional requirements for harmonized sample collection across geographically dispersed study sites. The commercial opportunity is therefore shifting from dependence on a single high-volume prenatal application toward a broader portfolio of clinical workflows in which repeat testing and long-distance specimen logistics increase the value of reliable cfDNA stabilization.

Regional Insights

North America is a major clinical demand center for Cell-Free DNA Blood Collection Tubes, supported by large-scale oncology liquid biopsy, MRD, transplant diagnostics, and established NIPT testing infrastructure. The region also contains important specialist technology developers and major clinical testing companies, which accelerates validation of specialized blood collection tubes within regulated workflows. Europe has a mature pre-analytical and blood collection industry and a strong base of internationally active manufacturers, particularly in Germany, Austria, Switzerland, and the United Kingdom. Regulatory transition toward more rigorous IVD requirements reinforces the importance of validated products and established quality systems.

Asia has a different market structure. China has the highest concentration of core manufacturing companies identified in this study and combines very large conventional blood collection manufacturing capacity with a growing group of specialized cfDNA tube manufacturers. This supports localization and downward pressure on manufacturing costs. Japan maintains a technologically advanced blood collection and diagnostics base, including domestic manufacturing of dedicated cfDNA collection products, while South Korea has developed several specialist manufacturers with proprietary vacuum blood collection systems. India is represented by a smaller group of regional manufacturers, whereas Southeast Asia and Taiwan remain more dependent on international and imported product platforms. Asia is therefore becoming increasingly important not only as a testing market but also as a production and supply base.

Competitive Landscape Analysis

The competitive landscape combines global blood collection manufacturers, specialist cfDNA preservation technology companies, and a growing group of Asian manufacturers. At the upper end of the market, Becton, Dickinson and Company,

Greiner Bio-One, Streck, SARSTEDT, and SEKISUI MEDICAL possess advantages in manufacturing quality systems, international distribution, regulatory experience, and large-scale production. Streck occupies a particularly important position in specialized cfDNA preservation, with more than 35 million Cell-Free DNA BCT tubes sold globally by the time of its U.S. FDA De Novo clearance, demonstrating substantial historical adoption in molecular testing workflows. Roche-branded Cell-Free DNA Collection Tubes have also exceeded one million units of worldwide usage, illustrating the commercial importance of diagnostic-company validation and distribution even where manufacturing and brand ownership are separated. Chinese manufacturers such as Liuyang Sanli Medical Technology Development, Hebei Xinle Sci&Tech, Improve Medical Instruments, Jiangsu CoWin Biotech, Hefei Lakebio Medical Technologies, and other validated producers compete through manufacturing scale, localized supply, and lower cost structures, while Korean manufacturers including SOYAGREENTEC, LABEX, and AccuGene expand the regional specialist supply base. Competitive advantage increasingly depends on the combination of preservation chemistry, automated manufacturing, stability performance, regulatory approvals, downstream assay validation, global distribution, and the ability to supply high-volume testing organizations consistently rather than on tube-body manufacturing alone.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Cell-Free DNA Blood Collection Tubes 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 Cell-Free DNA Blood Collection Tubes portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Cell-Free DNA Blood Collection Tubes market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Cell-Free DNA Blood Collection Tubes 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 Cell-Free DNA Blood Collection Tubes.

This report presents a comprehensive overview, market shares, and growth opportunities of Cell-Free DNA Blood Collection Tubes market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Dedicated cfDNA Preservation Tubes

Multi-Analyte Cell-Free Nucleic Acid Preservation Tubes

Other

Segmentation by Blood Draw Volume:

Up to 5 mL

More than 5 mL and Less than 10 mL

10 mL and Above

Other

Segmentation by Application:

Non-Invasive Prenatal Testing

Cancer Screening and Early Detection

Therapy Selection and Companion Diagnostics

Molecular Residual Disease Monitoring

Transplant Rejection 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

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.

Becton, Dickinson and Company

Greiner Bio-One GmbH

Streck, LLC

SARSTEDT AG & Co. KG

SEKISUI MEDICAL CO., LTD.

Liuyang Sanli Medical Technology Development Co., Ltd.

Hebei Xinle Sci&Tech Co., Ltd.

Improve Medical Instruments Co., Ltd.

Norgen Biotek Corp.

Nonacus Limited

SOYAGREENTEC CO., LTD.

LABEX INC.

AccuGene, Inc.

Jiangsu CoWin Biotech Co., Ltd.

Hefei Lakebio Medical Technologies Co., Ltd.

Shandong Ande Healthcare Apparatus Co., Ltd.

BGI Biotechnology Wuhan Co., Ltd.

Changsha Renji Medical Equipment Co., Ltd.

Zhejiang SKG Medical Technology Co., Ltd.

Huachenyang Shenzhen Technology Co., Ltd.

Dewei Medical Equipment Co., Ltd.

Guangdong Ardent Biomed Co., Ltd.

Nasmed Diagnostics Pvt. Ltd.

Aixgen Technology Heze Co., Ltd.

YALI Biotech Co., Ltd.

Xiamen Zhixuan Biotechnology Co., Ltd.

BioDetect Xiamen Biotechnology Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Cell-Free DNA Blood Collection Tubes market?

What factors are driving Cell-Free DNA Blood Collection Tubes market growth, globally and by region?

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

How do Cell-Free DNA Blood Collection Tubes market opportunities vary by end market size?

How does Cell-Free DNA Blood Collection Tubes break out by Type, by Application?

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