

Global Liquid-phase Breeding Chip Market Growth 2026-2032

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Abstracts

The global Liquid-phase Breeding Chip market size is predicted to grow from US\$ 94.66 million in 2025 to US\$ 143 million in 2032; it is expected to grow at a CAGR of 5.6% from 2026 to 2032.

A liquid-phase breeding chip is a genotyping platform that performs DNA marker detection in solution rather than on a fixed solid array. Instead of immobilizing probes on glass or silicon, it uses solution-based chemistries—such as multiplex PCR, target capture sequencing, or allele-specific fluorescence assays (e.g., KASP, AgriSeq, genotyping-by-sequencing)—to identify genetic variation. Because it is flexible, scalable, and often cheaper per sample for smaller marker sets, liquid-phase chips are widely applied in crop and livestock breeding programs to verify specific traits, accelerate marker-assisted selection, and reduce costs compared to high-density solid-phase arrays.

The upstream segment of the liquid-phase breeding chip industry focuses on the development and production inputs necessary to create the chips. It includes the collection and analysis of plant genetic resources, such as germplasm and DNA samples, and the identification of genetic markers through biotechnology and sequencing. In addition, upstream suppliers provide chip design, reagents, substrates, and microarray or manufacturing services that enable high-throughput genotyping.

The downstream segment centers on the application and commercialization of these chips. Major users include seed companies, crop breeding institutes, and agricultural research organizations, which apply chip-based genotyping to accelerate marker-assisted selection, trait analysis, and variety improvement. Ultimately, the results benefit farmers and agribusinesses through the development of high-yield, stress-resistant, and

disease-tolerant crop varieties. In short, upstream activities provide the technological foundation for chip production, while downstream activities translate that technology into practical breeding innovations and commercial seed products.

In 2025, global Liquid-phase Breeding Chip production reached approximately 2481 k Pcs, with an average global market price of around 39 USD/ Pc,.The production capacity for Liquid-phase Breeding Chip in 2025 was approximately 3000 k Pcs. The typical gross profit margin for Liquid-phase Breeding Chip between 20% and 40%.

The liquid-phase breeding chip market is being driven by the digital transformation of the seed industry, commercialization of molecular breeding, wider adoption of genomic selection, and growing demand to shorten crop and animal breeding cycles. Compared with fixed-content solid-state arrays, liquid-phase panels allow markers to be added, removed, or adjusted more easily according to species, breeding populations, and target traits, making them particularly suitable for new variety development, germplasm evaluation, and proprietary marker databases. As high-quality reference genomes, whole-genome resequencing datasets, and validated trait-associated markers continue to expand, liquid-phase chips are progressing from research-oriented validation tools toward large-scale breeding selection and commercial testing platforms. Future competition will focus on proprietary marker resources, probe and primer design, sequencing cost, genotype-calling accuracy, bioinformatics software, and integrated breeding data services, while marker transferability across populations, testing standardization, and data consistency at large sample volumes remain important market challenges.

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

This Insight Report provides a comprehensive analysis of the global Liquid-phase Breeding 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 Liquid-phase Breeding Chip portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position

in an accelerating global Liquid-phase Breeding Chip market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Liquid-phase Breeding 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 Liquid-phase Breeding Chip.

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

Segmentation by Type:

SNP Breeding Panels

InDel Breeding Panels

Combined SNP and InDel Panels

Segmentation by Product Design:

Semi-custom Chips

Fully Custom Chips

Segmentation by Number of Target Markers:

Low-density Crop Breeding Chips

Medium-density Crop Breeding Chips

High-density Crop Breeding Chips

Segmentation by Application:

Crop Seed Industry

Livestock and Poultry Breeding

Aquaculture Breeding

Horticulture and Forestry Breeding

Others

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.

Thermo Fisher Scientific

Agilent

Illumina

Qnsect

Lasso Biochip Technology

GreenFaFa

Key Questions Addressed in this Report

What is the 10-year outlook for the global Liquid-phase Breeding Chip market?

What factors are driving Liquid-phase Breeding Chip market growth, globally and by region?

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

How do Liquid-phase Breeding Chip market opportunities vary by end market size?

How does Liquid-phase Breeding Chip break out by Type, by Application?

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