

Spatial Genomics Market by Type (Genomics, Transcriptomics) Technology (Sequencing, Imaging) Application (Oncology, Neurology) Offering (Consumables, Instrument, Software) End User (Pharmaceutical & Biotechnology, CRO) - Global Forecast to 2031

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Abstracts

Spatial Genomics Market by Type (Genomics, Transcriptomics) Technology (Sequencing, Imaging) Application (Oncology, Neurology) Offering (Consumables, Instrument, Software) End User (Pharmaceutical & Biotechnology, CRO)—Global Forecast to 2031

The global spatial genomics & transcriptomics market is expected to reach \$3.23 billion by 2031 at a CAGR of 27.8% from 2024 to 2031.

Succeeding extensive secondary and primary research and in-depth analysis of the market scenario, the report comprises the analysis of key industry drivers, restraints, challenges, and opportunities. The growth of the spatial genomics market is driven by the increasing applications of spatial genomics in drug discovery & development, the growing use of spatial genomics in cancer research, advancements in Next-generation Sequencing (NGS), the increasing use of spatial genomics in biomarker detection, and the rising prevalence of cancer. However, the lack of standardized approaches in genomics and concerns over the security & privacy of genomic data restrain the growth of this market.

Furthermore, the rising adoption of personalized medicines and gene therapies and increasing investments in spatial genomics are expected to generate growth

opportunities for the players operating in this market. However, complexities in data analysis and slow technology adoption are major challenges impacting market growth.

The report offers a competitive landscape based on an extensive assessment of the product portfolio offerings, geographic presences, and key strategic developments adopted by leading market players in the industry over the years (2020–2024). The key players operating in the global spatial genomics & transcriptomics market are NanoString Technologies, Inc. (U.S.), 10X Genomics, Inc. (U.S.), Illumina, Inc. (U.S.), Oxford Nanopore Technologies Plc. (U.K.), Akoya Biosciences, Inc. (U.S.), Revvity, Inc. (U.S.), S2 Genomics, Inc. (U.S.), Cantata Bio (U.S.), Vizgen Inc. (U.S.), Biospyder Technologies Inc. (U.S.), and Resolve Biosciences GmbH (Germany).

Among all the offerings studied in this report, the instruments segment is projected to register the highest CAGR during the forecast period. The use of instruments to profile the tumor microenvironment and the adoption of spatial transcriptomics in academics and research laboratories for drug and translational research are positively impacting the demand for instruments used in spatial genomics. Additionally, product launches by key market players support market growth. For instance, in December 2022, 10X Genomics, Inc. (U.S.) launched a Xenium Analyzer for subcellular in situ profiling.

Among all the types studied in this report, in 2024, the transcriptomics segment is expected to account for the largest share of the spatial genomics & transcriptomics market. The largest share of the segment is attributed to the increasing use of spatial transcriptomics to provide a complete roadmap of transcriptional activity within whole tissue sections required in translational research. Additionally, increasing acceptance of spatial transcriptomic technology for the identification of cellular components is driving the market growth.

Among all the technologies studied in this report, the sequencing-based segment is projected to register the highest CAGR during the forecast period. The growth of the segment is attributed to the NGS platforms offering superior sequencing capacity at substantially reduced costs, owing to which the use of NGS has increased in genomic studies to produce massive genomic sequencing data. Additionally, high throughput, low cost, individual characterization of cells, and analysis of multiple targets drive the market growth.

Among all the applications studied in this report, in 2024, the oncology segment is expected to account for the largest share of the spatial genomics & transcriptomics

market. Increasing applications of spatial genomics & transcriptomics in tumor biology, such as the study of tumor heterogeneity, detecting the presence of infiltrating immune cells, and insights into tumor microenvironment, are contributing to the largest share of the segment. Additionally, the product launches by key market players are supporting the largest market share. For instance, in April 2023, Akoya Biosciences (U.S.) launched PhenoCode Discovery Panels for the advancements in cancer research.

Among all the end users studied in this report, the pharmaceutical & biotechnology companies segment is expected to grow at the highest CAGR during the forecast period. The growth is attributed to the increasing research & development by pharmaceutical & biotechnology companies, the rising utilization of spatial genomics assays for research processes, and an increasing number of biotechnology companies. Moreover, the rising incidence of chronic diseases has accelerated the need to expedite drug development processes, further propelling the adoption of spatial genomics among pharmaceutical companies.

An in-depth analysis of the geographical scenario of the global spatial genomics & transcriptomics market provides detailed qualitative and quantitative insights into the five major geographies (North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa) along with the coverage of major countries in each region. In 2024, North America is expected to account for the largest share of the spatial genomics & transcriptomics market. North America holds the predominant share in the region, largely due to its multitude of esteemed research institutions, universities, and organizations committed to genomics research. The region has played a pivotal role in advancing cancer genomics, driven by substantial investments in pharmaceutical research and development and the significant presence of key industry players. For instance, R&D spending by pharmaceutical companies in Canada for drug discovery has increased, driving the demand for spatial genomics. For instance, in 2020, total R&D expenditure in Canada's pharmaceutical sector was estimated at between USD 1.8 billion and USD 2.4 billion, compared to USD 1.6 billion and USD 2.2 billion in 2019

Scope of the Report:

Spatial Genomics Market Assessment, by Offering

Instruments

Consumables

Software & Services

Spatial Genomics Market Assessment, by Type

Transcriptomics

Genomics

Spatial Genomics Market Assessment, by Technology

Imaging Based

Sequencing Based

Spatial Genomics Market Assessment, by Application

Oncology

Neurology

Other Applications

Note: Other applications consist of infectious diseases and immunology.

Spatial Genomics Market Assessment, by End User

Pharmaceutical & Biotechnology Companies

Contract Research Organizations

Other End Users

Note: Other end users include academic institutes & research centers and agriculture companies.

Spatial Genomics Market by Type (Genomics, Transcriptomics) Technology (Sequencing, Imaging) Application (Onco...

Spatial Genomics Market Assessment, by Geography

North America

U.S.

Canada

Europe

Germany

U.K.

France

Italy

Spain

Rest of Europe (RoE)

Asia-Pacific (APAC)

China

Japan

India

Rest of Asia-Pacific (RoAPAC)

Latin America

Middle East & Africa

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