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Spatial OMICS Market Forecasts to 2030 – Global Analysis By Solution Type (Instruments, Consumables and Software), Sample Type, Workflow, Technology, Application, End User and By Geography

https://marketpublishers.com/r/S751A421EC07EN.html
Date: February 2025
Pages: 150
Price: US$ 4,150.00 (Single User License)
ID: S751A421EC07EN

Abstracts

According to Stratistics MRC, the Global Spatial OMICS Market is accounted for $416.20 million in 2024 and is expected to reach $830.79 million by 2030 growing at a CAGR of 12.21% during the forecast period. Spatial OMICS is an advanced field of study that integrates spatial information with omics data, such as genomics, transcriptomics, proteomics, and metabolomics, to provide a detailed molecular and spatial understanding of biological systems. Spatial omics maintains the spatial organization of cells and tissues, allowing researchers to view and examine molecular data in its natural biological setting, in contrast to traditional omics techniques that frequently lose spatial context because of bulk analysis.

According to a study published in Nucleic Acids Research, SpatialRef is a manually curated spatial omics database that aggregates over 9 million manually annotated spots across multiple species.

Market Dynamics:

Driver:

Growing interest in customized treatment

One of the strongest factors propelling the spatial OMICS market is the move toward personalized or precision medicine. A thorough grasp of the cellular and molecular dynamics of diseases in particular patient populations is necessary for personalized

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treatments. Scientists can produce intricate maps of cellular heterogeneity within tissues using spatial OMICS technologies, which provide vital insights into drug responses, therapeutic targets, and disease mechanisms. Additionally, this is especially helpful in neurological disorders, where knowledge of the molecular mechanisms underlying the various brain regions can guide treatment strategies, and oncology, where tumor complexity varies greatly from patient to patient.

Restraint:

High equipment and technology costs

The high cost of the sophisticated tools and technologies needed for the creation and analysis of spatial data is one of the main factors limiting the market for spatial OMICS. High-resolution microscopes, mass spectrometers, and next-generation sequencers are just a few examples of the costly equipment used in spatial transcriptomics, spatial proteomics, and spatial metabolomics. The financial burden is further increased by the price of consumables, reagents, and specialized bioinformatics software. Furthermore, these large upfront costs can be unaffordable for many smaller businesses and research institutions, which restrict their access to and use of spatial OMICS technologies.

Opportunity:

Developments in the integration of multiple omics

Integrating multi-omics data—such as transcriptomics, proteomics, metabolomics, and genomics—with spatial data is one of the most exciting prospects in the spatial OMICS market. Through the integration of spatial context and molecular information, this potent combination enables researchers to obtain a thorough understanding of biological processes. Identification of cellular interactions and microenvironmental factors that impact drug response, disease progression, and other physiological processes is made possible by the ability to visualize the localization of genes, proteins, or metabolites within tissues. Moreover, this multi-omics approach is especially helpful in fields like drug development, neuroscience, and cancer research, where a molecular understanding of spatial heterogeneity can result in advances in targeted therapies and personalized medicine.

Threat:

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Complexity of data and analysis difficulties

One other major threat is the complexity of spatial omics data. Due to the vast amount of data produced by spatially resolved molecular profiling and the complex relationships among the various omics data layers, data analysis and interpretation are exceedingly difficult. Additionally, in order to integrate, visualize, and interpret the additional layer of complexity brought about by the spatial dimension, specific software and computational techniques are needed. Even seasoned researchers may find it difficult to draw significant conclusions from these intricate datasets without strong computing infrastructure and advanced bioinformatics knowledge.

Covid-19 Impact:

The market for spatial OMICS was significantly impacted by the COVID-19 pandemic, which sped up the adoption of advanced omics technologies as scientists and medical professionals tried to track the virus's mutations, comprehend its behaviour, and create vaccines and targeted treatments. The demand for spatial omics tools, especially in the domains of transcriptomics, proteomics, and genomics, increased due to the requirement for extensive, high-resolution molecular data to investigate the virus at a spatial level. Investments in spatial omics technologies were fuelled by this spike in interest, which encouraged innovation and increased the range of uses for these technologies in immunology and virology.

The Formalin-Fixed Paraffin-Embedded (FFPE) Tissue segment is expected to be the largest during the forecast period

In the spatial OMICS market, the formalin-fixed paraffin-embedded (FFPE) tissue segment is expected to have the largest share. Retrospective studies frequently use FFPE tissue samples because of their long shelf life and ease of storage in clinical and research settings. These tissue samples allow for a thorough examination of gene expression, protein levels, and other molecular properties in relation to tissue architecture because they maintain the molecular integrity of biological specimens. Moreover, many omics-based methods, including spatial transcriptomics, spatial proteomics, and others, use FFPE samples to investigate diseases like cancer, infectious diseases, and neurodegenerative conditions.

The Data Analysis segment is expected to have the highest CAGR during the forecast period

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In the spatial OMICS market, the data analysis segment is anticipated to grow at the highest CAGR. The demand for sophisticated bioinformatics tools and data analysis platforms has increased as a result of the massive volumes of complex, multidimensional data generated by spatial omics technologies. In order to process, integrate, and interpret the spatially resolved molecular data, this section covers the creation and use of advanced machine learning algorithms, artificial intelligence, and statistical models. Additionally, innovation in data analysis techniques is being fueled by the growing complexity of spatial omics data, which blends genomic, transcriptomic, proteomic, and imaging data.

Region with largest share:

The market for spatial OMICS is expected to be largest share by the North America segment. A strong presence of top academic institutions and biotechnology companies, substantial investments in research and development, and an established healthcare infrastructure all contribute to the region's advantages. With a strong need for state-of-the-art instruments in research in oncology, immunology, and neurology, the US has been at the forefront of developments in spatial omics technologies. Innovation and the use of spatial omics in many different fields have been fuelled by the presence of important players and significant funding from the public and private sectors. Furthermore, the regulatory framework in North America also encourages the creation and application of cutting-edge biomedical technologies, which strengthens the region's market leadership.

Region with highest CAGR:

In the spatial OMICS market, the Asia Pacific region is anticipated to have the highest CAGR. Adoption of spatial omics technologies in the region is being driven by the biotechnology sector's explosive growth as well as rising investments in research and healthcare infrastructure. Significant advancements in genomics, molecular biology, and biomedical research are being made by nations like China, Japan, and India, which is increasing the need for spatial omics tools in both academic and clinical settings. Moreover, improvements in data analysis skills and the growing emphasis on infectious diseases, cancer research, and personalized medicine in these fields are also fueling the market's explosive growth.

Key players in the market

Some of the key players in Spatial OMICS market include Biognosys AG, Ultivue, Inc.,

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Diagenode Diagnostics (Hologic, Inc.), Advanced Cell Diagnostics, Inc., Fluidigm Corporation, Danaher Corporation, Bruker Corporation, ZEISS Group, Bio-Rad Laboratories, Inc., PerkinElmer, Inc., NanoString Technologies, Inc., Akoya Biosciences, Inc., Brooks Automation, Inc., Vizgen Corporation and Rebus Biosystems, Inc.

Key Developments:

In April 2024, Bio-Rad Laboratories, Inc. a global leader in life science research and clinical diagnostics products, announced a collaboration agreement with Oncocyte Corporation (Nasdaq: OCX), a precision diagnostics company, to develop and commercialize transplant monitoring products using Bio-Rad's Droplet Digital™ PCR (ddPCR™) instruments and reagents.

In February 2024, Life sciences and diagnostics company Bruker has agreed to acquire ELITechGroup, a provider of in-vitro diagnostic (IVD) systems, in a €870m ($942m) cash deal. ELITechGroup will be acquired from TecFin, a controlled affiliate of pre-eminent private equity company PAI Partners.

In January 2024, Biognosys announced the operational readiness of its new proteomics facility in Massachusetts. This US expansion facilitates access to select proteomics contract research organization (CRO) services for our US biopharma customers.

Solution Types Covered:

Instruments

Consumables

Software

Sample Types Covered:

Formalin-Fixed Paraffin-Embedded (FFPE) Tissue

Fresh Frozen Tissue

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Workflows Covered:

- Sample Preparation
- Instrumental Analysis
- Data Analysis

Technologies Covered:

- Spatial Transcriptomics
- Spatial Proteomics
- Spatial Genomics

Applications Covered:

- Diagnostics
- Translation Research
- Drug Discovery and Development
- Single Cell Analysis
- Cell Biology
- Other Applications

End Users Covered:

- Academic and Research Institutions
- Biopharmaceutical & Biotechnological Companies

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- Contract Research Organization
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India
  - Australia

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New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments

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- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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