

Liquid Biopsy Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Offering (Testing Services, Kits, Platform, Other consumables), By Technology (Polymerase Chain Reaction (PCR), Next Generation Sequencing (NGS), Others), By Workflow (Sample Preparation, Library Preparation, Sequencing, Data Analysis & Management), By Sample (Blood, Urine, Saliva, Others), By Circulating Biomarkers (Circulating Tumor Cells (CTCs), Cell-free Nucleic Acids, Exosomes & Extracellular Vesicles), By Application (Oncological and Non-oncological), By End User (Clinical Laboratories, Academic & Research Institutes, Pharmaceutical & Biotechnology Companies), By Region and Competition, 2019-2029F

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Abstracts

Global Liquid Biopsy Market was valued at USD 4.38 Billion in 2023 and is anticipated to project impressive growth of 12.41% through 2029. Global Liquid Biopsy Market is experiencing rapid growth driven by several key factors. These include the increasing demand for non-invasive diagnostic techniques, technological advancements enhancing assay accuracy, the rising prevalence of cancer and chronic diseases, and expanding applications beyond oncology. Supportive regulatory frameworks, reimbursement policies, and investments in research and development further fuel market expansion.

The convergence of clinical need, technological innovation, and regulatory support presents significant opportunities for market players to improve disease detection, monitoring, and treatment outcomes through liquid biopsy technologies.

Key Market Drivers

Growing Demand for Non-Invasive Diagnostic Tools

Global Liquid Biopsy Market is propelled by an escalating demand for non-invasive diagnostic methods across various medical fields. Liquid biopsy, characterized by its minimally invasive nature and ability to analyze biomarkers circulating in bodily fluids, offers a revolutionary approach to disease detection and monitoring. Particularly in oncology, where early detection is critical for improved patient outcomes, liquid biopsy holds immense promise. By detecting and analyzing circulating tumor cells (CTCs), cell-free DNA (cfDNA), and other biomolecules, liquid biopsy provides valuable insights into disease progression, treatment response, and the emergence of drug resistance. This demand for non-invasive diagnostic tools is fueled by a growing recognition of the limitations and invasiveness of traditional tissue biopsies, driving healthcare providers and patients alike to seek alternatives that offer greater convenience and reduced risk.

Technological Advancements in Genomic Analysis

Technological advancements in genomic analysis, molecular biology, and bioinformatics are driving significant advancements in the Global Liquid Biopsy Market. These innovations have led to the development of highly sensitive and specific liquid biopsy assays capable of detecting minute quantities of circulating biomarkers with unprecedented accuracy. Next-generation sequencing (NGS) and digital PCR platforms have revolutionized liquid biopsy-based genomic profiling, enabling comprehensive analysis of genetic alterations such as mutations, copy number variations, and chromosomal rearrangements. These advancements not only enhance the diagnostic capabilities of liquid biopsy but also enable the monitoring of disease dynamics in real-time, facilitating personalized treatment strategies tailored to individual patients' molecular profiles.

Rising Prevalence of Cancer and Chronic Diseases

The increasing prevalence of cancer and chronic diseases worldwide is driving the adoption of liquid biopsy technologies. With cancer rates on the rise globally and chronic diseases such as cardiovascular disorders and neurodegenerative conditions

posing significant public health challenges, there is a growing need for effective diagnostic and monitoring tools. Liquid biopsy offers a minimally invasive and repeatable method for disease assessment, particularly valuable in cancer management, where serial monitoring of disease progression and treatment response is essential. Additionally, liquid biopsy has applications beyond oncology, including prenatal screening, infectious disease monitoring, transplant rejection monitoring, and drug development, further expanding its market potential. As the burden of cancer and chronic diseases continues to grow, the demand for liquid biopsy technologies is expected to increase, driving market growth in the coming years.

Supportive Regulatory Frameworks and Reimbursement Policies

Supportive regulatory frameworks and reimbursement policies are essential drivers of growth in the Global Liquid Biopsy Market, facilitating the adoption of innovative diagnostic technologies that promise to revolutionize disease diagnosis and management. Governments worldwide are increasingly recognizing the potential of liquid biopsy technologies to improve patient outcomes and healthcare delivery, prompting concerted efforts to streamline regulatory processes and reimbursement policies.

Regulatory bodies are playing a pivotal role in this regard by expediting approval processes for liquid biopsy assays, ensuring that these tests meet stringent standards of safety, efficacy, and quality. By accelerating the regulatory approval timeline, regulatory agencies are enabling faster market entry for liquid biopsy products, thereby expediting their availability to patients and healthcare providers.

Furthermore, governments are updating reimbursement policies to encompass liquid biopsy tests, ensuring that patients have greater access to these innovative diagnostic tools. Reimbursement coverage for liquid biopsy tests reduces financial barriers for patients and healthcare providers, making these tests more accessible and affordable. As a result, patients can benefit from timely and accurate disease diagnosis, leading to improved treatment outcomes and quality of life.

Key Market Challenges

Cost and Reimbursement Challenges

Cost and reimbursement challenges pose significant barriers to the adoption of liquid biopsy tests in clinical practice. While liquid biopsy offers the potential for non-invasive

and real-time monitoring of disease progression, the high cost of assay development, validation, and implementation can limit patient access and healthcare provider adoption. Additionally, reimbursement policies may lag behind technological advancements, leading to disparities in coverage and reimbursement rates for liquid biopsy tests. Addressing these challenges requires collaboration between industry stakeholders, policymakers, and payers to develop sustainable reimbursement models that ensure equitable access to liquid biopsy technologies for patients.

Sample Quality and Pre-Analytical Variables

Global Liquid Biopsy Market faces a significant hurdle stemming from the variability in sample quality and pre-analytical variables. Sample collection, processing, and storage conditions can greatly influence the integrity and stability of circulating biomarkers present in liquid biopsy samples, potentially leading to inaccurate test results and diagnostic errors.

Various factors contribute to this variability, including differences in blood collection techniques, the use of different types of blood collection tubes, variations in processing methods, and delays in sample transportation to testing laboratories. These factors can introduce inconsistencies in sample handling and processing, compromising the reliability and reproducibility of liquid biopsy assays.

For instance, improper blood collection techniques or the use of suboptimal blood collection tubes may result in hemolysis, leading to the release of intracellular components that can interfere with biomarker analysis. Similarly, delays in sample processing or storage at incorrect temperatures can degrade circulating biomarkers, reducing their detectability and compromising assay accuracy.

Key Market Trends

Focus on Liquid Biopsy Standardization and Quality Control

Standardization and quality control measures are becoming increasingly important in the Global Liquid Biopsy Market to ensure the reliability and reproducibility of test results. Efforts are underway to establish standardized protocols for sample collection, processing, and analysis, as well as quality control measures to monitor assay performance and minimize variability. Standardization initiatives aim to enhance the accuracy and comparability of liquid biopsy test results across different laboratories and testing platforms, fostering confidence among clinicians and patients in the reliability of

liquid biopsy-based diagnostics.

Rise of Point-of-Care (POC) and Decentralized Testing

The rise of point-of-care (POC) and decentralized testing is a notable trend in the Global Liquid Biopsy Market, spurred by the demand for rapid and accessible diagnostic solutions. POC and decentralized testing platforms revolutionize the landscape of liquid biopsy diagnostics by enabling real-time analysis of liquid biopsy samples directly at or near the patient's location. This approach eliminates the need for centralized laboratory facilities and significantly reduces turnaround times for obtaining test results.

These innovative platforms offer immense potential for expanding access to liquid biopsy-based diagnostics, particularly in resource-limited settings, remote geographical areas, and point-of-care settings such as clinics, ambulatory care centers, and community health centers. By bringing diagnostic capabilities closer to patients, POC and decentralized testing overcome geographical barriers and enhance healthcare accessibility for underserved populations.

Moreover, POC and decentralized testing play a crucial role in facilitating timely decision-making and treatment initiation, especially in urgent clinical scenarios where rapid diagnostic turnaround is paramount for effective patient management. By providing actionable insights into disease status and treatment response in real-time, these platforms empower healthcare providers to make informed decisions promptly, optimizing patient outcomes and healthcare efficiency.

Segmental Insights

Offering Insights

Based on the Offering, testing services emerged as the dominant segment in 2023. Testing services encompass a wide range of diagnostic procedures and analytical services offered by specialized laboratories and diagnostic centers. These services typically involve the collection, processing, analysis, and interpretation of liquid biopsy samples to detect and monitor biomarkers associated with various diseases, including cancer.

Testing services play a pivotal role in facilitating the adoption of liquid biopsy technologies in clinical practice, as they provide healthcare providers with access to expertise, infrastructure, and resources required for accurate and reliable testing.

Additionally, outsourcing liquid biopsy testing to specialized laboratories allows healthcare providers to leverage advanced technologies, such as next-generation sequencing (NGS) and digital PCR, which may not be readily available in-house. Testing services offer scalability and flexibility, enabling healthcare providers to tailor testing protocols to meet the specific needs of patients and clinical scenarios. This includes the ability to perform serial monitoring of disease progression, treatment response, and the emergence of drug resistance, providing valuable insights for personalized treatment planning and clinical decision-making.

Technology Insights

Based on the Technology, Next Generation Sequencing (NGS) emerges as the fastest growing segment. NGS, also known as high-throughput sequencing, revolutionizes the analysis of liquid biopsy samples by enabling the simultaneous sequencing of millions of DNA fragments in a single run. This technology offers unparalleled sensitivity, specificity, and scalability, allowing for comprehensive genomic profiling of circulating biomarkers such as circulating tumor DNA (ctDNA) and circulating tumor cells (CTCs).

NGS enables the detection of genetic alterations, including mutations, copy number variations, and chromosomal rearrangements, with high precision and accuracy. This capability is particularly valuable in oncology, where liquid biopsy-based genomic profiling can provide insights into tumor heterogeneity, clonal evolution, and the emergence of drug resistance. Additionally, NGS allows for the detection of rare and low-frequency mutations, enhancing the sensitivity of liquid biopsy assays for early cancer detection and treatment monitoring.

Regional Insights

North America emerged as the dominant region in the Global Liquid Biopsy Market. The region's leadership is driven by several key factors contributing to its remarkable market share and growth trajectory. North America boasts a robust healthcare infrastructure characterized by advanced medical facilities, cutting-edge research institutions, and a highly skilled workforce. This conducive environment fosters innovation and facilitates the development and adoption of novel diagnostic technologies such as liquid biopsy.

North America is home to a significant number of leading biotechnology and pharmaceutical companies actively engaged in the research, development, and commercialization of liquid biopsy products. These companies leverage the region's strong research ecosystem, access to capital, and supportive regulatory environment to

drive innovation and bring new liquid biopsy assays to market. The region's favorable reimbursement landscape and widespread adoption of personalized medicine contribute to the widespread acceptance and utilization of liquid biopsy technologies in clinical practice. Reimbursement policies in North America often provide coverage for liquid biopsy tests, ensuring patient access and affordability, which further fuels market growth.

Key Market Players

F. Hoffmann-La Roche Ltd.

Thermo Fisher Scientific, Inc.

PerkinElmer Inc.

LungLife AI, Inc.

Illumina, Inc.

QIAGEN NV

NeoGenomics Laboratories, Inc.

Myriad Genetics, Inc.

Bio-Rad Laboratories, Inc.

Guardant Health Inc.

Natera, Inc.

Sysmex Corporation

Abcodia Ltd.

Dxcover Limited

Report Scope:

In this report, the Global Liquid Biopsy Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Liquid Biopsy Market,By Offering:

- oTesting Services

- oKits

- oPlatform

- oOther Consumables

Liquid Biopsy Market,By Technology:

- oPolymerase Chain Reaction (PCR)

- oNext Generation Sequencing (NGS)

- oOthers

Liquid Biopsy Market,By Workflow:

- oSample Preparation

- oLibrary Preparation

- oSequencing

- oData Analysis Management

Liquid Biopsy Market,By Sample:

- oBlood

- oUrine

- oSaliva

oOthers

Liquid Biopsy Market,By Circulating Biomarkers:

oCirculating Tumor Cells (CTCs)

oCell-free Nucleic Acids

oExosomes Extracellular Vesicles

Liquid Biopsy Market,By Application:

oOncological

oNon-oncological

Liquid Biopsy Market,By End User:

oClinical Laboratories

oAcademic Research Institutes

oPharmaceutical Biotechnology Companies

Liquid Biopsy Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Liquid Biopsy Market.

Available Customizations:

Global Liquid Biopsy market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

1.PRODUCT OVERVIEW

- 1.1.Market Definition
- 1.2.Scope of the Market
 - 1.2.1.Markets Covered
 - 1.2.2.Years Considered for Study
 - 1.2.3.Key Market Segmentations

2.RESEARCH METHODOLOGY

- 2.1.Objective of the Study
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

3.EXECUTIVE SUMMARY

- 3.1.Overview of the Market
- 3.2.Overview of Key Market Segmentations
- 3.3.Overview of Key Market Players
- 3.4.Overview of Key Regions/Countries
- 3.5.Overview of Market Drivers, Challenges, and Trends

4.VOICE OF CUSTOMER

5.CLINICAL TRIAL ANALYSIS

6.PATENT ANALYSIS

7.GLOBAL LIQUID BIOPSY MARKET OUTLOOK

- 7.1.Market Size Forecast
 - 7.1.1.By Value
- 7.2.Market Share Forecast

- 7.2.1.By Offering (Testing Service, Kits, Platform, Other Consumables)
- 7.2.2.By Technology (Polymerase Chain Reactions, Next Generation Sequencing, Others)
- 7.2.3.By Workflow (Sample Preparation, Library Preparation, Sequencing, Data Analysis Management)
- 7.2.4.By Sample (Blood, Urine, Saliva, Others)
- 7.2.5.By Circulating Biomarker (Circulating Tumor Cells (CTCs), Cell Free Nucleic Acids, Exosomes Extracellular Vesicles, Others)
- 7.2.6.By Application (Oncological and non-Oncological)
 - 7.2.6.1.By Oncological (Breast Cancer, Lung Cancer, Prostate Cancer, Colorectal Cancer, Others)
 - 7.2.6.2.By Non-Oncological (Treatment Monitoring, Prognosis Recurrence Monitoring, Treatment Selection, Others)
- 7.2.7.By End User (Clinical Laboratories, Academic Research Institutes, Pharmaceutical Biotechnology Companies)
- 7.2.8.By Company (2023)
- 7.2.9.By Region
- 7.3.Market Map

8.NORTH AMERICA LIQUID BIOPSY MARKET OUTLOOK

- 8.1.Market Size Forecast
 - 8.1.1.By Value
- 8.2.Market Share Forecast
 - 8.2.1.By Offering
 - 8.2.2.By Technology
 - 8.2.3.By Workflow
 - 8.2.4.By Sample
 - 8.2.5.By Circulating Biomarker
 - 8.2.6.By Application
 - 8.2.7.By End User
 - 8.2.8.By Country
- 8.3.North America: Country Analysis
 - 8.3.1.United States Liquid Biopsy Market Outlook
 - 8.3.1.1.Market Size Forecast
 - 8.3.1.1.1.By Value
 - 8.3.1.2.Market Share Forecast
 - 8.3.1.2.1.By Offering
 - 8.3.1.2.2.By Technology

- 8.3.1.2.3.By Workflow
- 8.3.1.2.4.By Sample
- 8.3.1.2.5.By Circulating Biomarker
- 8.3.1.2.6.By Application
- 8.3.1.2.7.By End User
- 8.3.2.Mexico Liquid Biopsy Market Outlook
 - 8.3.2.1.Market Size Forecast
 - 8.3.2.1.1.By Value
 - 8.3.2.2.Market Share Forecast
 - 8.3.2.2.1.By Offering
 - 8.3.2.2.2.By Technology
 - 8.3.2.2.3.By Workflow
 - 8.3.2.2.4.By Sample
 - 8.3.2.2.5.By Circulating Biomarker
 - 8.3.2.2.6.By Application
 - 8.3.2.2.7.By End User
- 8.3.3.Canada Liquid Biopsy Market Outlook
 - 8.3.3.1.Market Size Forecast
 - 8.3.3.1.1.By Value
 - 8.3.3.2.Market Share Forecast
 - 8.3.3.2.1.By Offering
 - 8.3.3.2.2.By Technology
 - 8.3.3.2.3.By Workflow
 - 8.3.3.2.4.By Sample
 - 8.3.3.2.5.By Circulating Biomarker
 - 8.3.3.2.6.By Application
 - 8.3.3.2.7.By End User

9.EUROPE LIQUID BIOPSY MARKET OUTLOOK

- 9.1.Market Size Forecast
 - 9.1.1.By Value
- 9.2.Market Share Forecast
 - 9.2.1.By Offering
 - 9.2.2.By Technology
 - 9.2.3.By Workflow
 - 9.2.4.By Sample
 - 9.2.5.By Circulating Biomarker
 - 9.2.6.By Application

9.2.7.By End User

9.2.8.By Country

9.3.Europe: Country Analysis

9.3.1.France Liquid Biopsy Market Outlook

9.3.1.1.Market Size Forecast

9.3.1.1.1.By Value

9.3.1.2.Market Share Forecast

9.3.1.2.1.By Offering

9.3.1.2.2.By Technology

9.3.1.2.3.By Workflow

9.3.1.2.4.By Sample

9.3.1.2.5.By Circulating Biomarker

9.3.1.2.6.By Application

9.3.1.2.7.By End User

9.3.2.Germany Liquid Biopsy Market Outlook

9.3.2.1.Market Size Forecast

9.3.2.1.1.By Value

9.3.2.2.Market Share Forecast

9.3.2.2.1.By Offering

9.3.2.2.2.By Technology

9.3.2.2.3.By Workflow

9.3.2.2.4.By Sample

9.3.2.2.5.By Circulating Biomarker

9.3.2.2.6.By Application

9.3.2.2.7.By End User

9.3.3.United Kingdom Liquid Biopsy Market Outlook

9.3.3.1.Market Size Forecast

9.3.3.1.1.By Value

9.3.3.2.Market Share Forecast

9.3.3.2.1.By Offering

9.3.3.2.2.By Technology

9.3.3.2.3.By Workflow

9.3.3.2.4.By Sample

9.3.3.2.5.By Circulating Biomarker

9.3.3.2.6.By Application

9.3.3.2.7.By End User

9.3.4.Italy Liquid Biopsy Market Outlook

9.3.4.1.Market Size Forecast

9.3.4.1.1.By Value

9.3.4.2.Market Share Forecast

9.3.4.2.1.By Offering

9.3.4.2.2.By Technology

9.3.4.2.3.By Workflow

9.3.4.2.4.By Sample

9.3.4.2.5.By Circulating Biomarker

9.3.4.2.6.By Application

9.3.4.2.7.By End User

9.3.5.Spain Liquid Biopsy Market Outlook

9.3.5.1.Market Size Forecast

9.3.5.1.1.By Value

9.3.5.2.Market Share Forecast

9.3.5.2.1.By Offering

9.3.5.2.2.By Technology

9.3.5.2.3.By Workflow

9.3.5.2.4.By Sample

9.3.5.2.5.By Circulating Biomarker

9.3.5.2.6.By Application

9.3.5.2.7.By End User

10.ASIA-PACIFIC LIQUID BIOPSY MARKET OUTLOOK

10.1.Market Size Forecast

10.1.1.By Value

10.2.Market Share Forecast

10.2.1.By Offering

10.2.2.By Technology

10.2.3.By Workflow

10.2.4.By Sample

10.2.5.By Circulating Biomarker

10.2.6.By Application

10.2.7.By End User

10.2.8.By Country

10.3.Asia-Pacific: Country Analysis

10.3.1.China Liquid Biopsy Market Outlook

10.3.1.1.Market Size Forecast

10.3.1.1.1.By Value

10.3.1.2.Market Share Forecast

10.3.1.2.1.By Offering

- 10.3.1.2.2.By Technology
- 10.3.1.2.3.By Workflow
- 10.3.1.2.4.By Sample
- 10.3.1.2.5.By Circulating Biomarker
- 10.3.1.2.6.By Application
- 10.3.1.2.7.By End User
- 10.3.2.India Liquid Biopsy Market Outlook
 - 10.3.2.1.Market Size Forecast
 - 10.3.2.1.1.By Value
 - 10.3.2.2.Market Share Forecast
 - 10.3.2.2.1.By Offering
 - 10.3.2.2.2.By Technology
 - 10.3.2.2.3.By Workflow
 - 10.3.2.2.4.By Sample
 - 10.3.2.2.5.By Circulating Biomarker
 - 10.3.2.2.6.By Application
 - 10.3.2.2.7.By End User
- 10.3.3.South Korea Liquid Biopsy Market Outlook
 - 10.3.3.1.Market Size Forecast
 - 10.3.3.1.1.By Value
 - 10.3.3.2.Market Share Forecast
 - 10.3.3.2.1.By Offering
 - 10.3.3.2.2.By Technology
 - 10.3.3.2.3.By Workflow
 - 10.3.3.2.4.By Sample
 - 10.3.3.2.5.By Circulating Biomarker
 - 10.3.3.2.6.By Application
 - 10.3.3.2.7.By End User
- 10.3.4.Japan Liquid Biopsy Market Outlook
 - 10.3.4.1.Market Size Forecast
 - 10.3.4.1.1.By Value
 - 10.3.4.2.Market Share Forecast
 - 10.3.4.2.1.By Offering
 - 10.3.4.2.2.By Technology
 - 10.3.4.2.3.By Workflow
 - 10.3.4.2.4.By Sample
 - 10.3.4.2.5.By Circulating Biomarker
 - 10.3.4.2.6.By Application
 - 10.3.4.2.7.By End User

10.3.5.Australia Liquid Biopsy Market Outlook

10.3.5.1.Market Size Forecast

10.3.5.1.1.By Value

10.3.5.2.Market Share Forecast

10.3.5.2.1.By Offering

10.3.5.2.2.By Technology

10.3.5.2.3.By Workflow

10.3.5.2.4.By Sample

10.3.5.2.5.By Circulating Biomarker

10.3.5.2.6.By Application

10.3.5.2.7.By End User

11.SOUTH AMERICA LIQUID BIOPSY MARKET OUTLOOK

11.1.Market Size Forecast

11.1.1.By Value

11.2.Market Share Forecast

11.2.1.By Offering

11.2.2.By Technology

11.2.3.By Workflow

11.2.4.By Sample

11.2.5.By Circulating Biomarker

11.2.6.By Application

11.2.7.By End User

11.2.8.By Country

11.3.South America: Country Analysis

11.3.1.Brazil Liquid Biopsy Market Outlook

11.3.1.1.Market Size Forecast

11.3.1.1.1.By Value

11.3.1.2.Market Share Forecast

11.3.1.2.1.By Offering

11.3.1.2.2.By Technology

11.3.1.2.3.By Workflow

11.3.1.2.4.By Sample

11.3.1.2.5.By Circulating Biomarker

11.3.1.2.6.By Application

11.3.1.2.7.By End User

11.3.2.Argentina Liquid Biopsy Market Outlook

11.3.2.1.Market Size Forecast

- 11.3.2.1.1.By Value
- 11.3.2.2.Market Share Forecast
 - 11.3.2.2.1.By Offering
 - 11.3.2.2.2.By Technology
 - 11.3.2.2.3.By Workflow
 - 11.3.2.2.4.By Sample
 - 11.3.2.2.5.By Circulating Biomarker
 - 11.3.2.2.6.By Application
 - 11.3.2.2.7.By End User
- 11.3.3.Colombia Liquid Biopsy Market Outlook
 - 11.3.3.1.Market Size Forecast
 - 11.3.3.1.1.By Value
 - 11.3.3.2.Market Share Forecast
 - 11.3.3.2.1.By Offering
 - 11.3.3.2.2.By Technology
 - 11.3.3.2.3.By Workflow
 - 11.3.3.2.4.By Sample
 - 11.3.3.2.5.By Circulating Biomarker
 - 11.3.3.2.6.By Application
 - 11.3.3.2.7.By End User

12.MIDDLE EAST AND AFRICA LIQUID BIOPSY MARKET OUTLOOK

- 12.1.Market Size Forecast
 - 12.1.1.By Value
- 12.2.Market Share Forecast
 - 12.2.1.By Offering
 - 12.2.2.By Technology
 - 12.2.3.By Workflow
 - 12.2.4.By Sample
 - 12.2.5.By Circulating Biomarker
 - 12.2.6.By Application
 - 12.2.7.By End User
 - 12.2.8.By Country
- 12.3.MEA: Country Analysis
 - 12.3.1.South Africa Liquid Biopsy Market Outlook
 - 12.3.1.1.Market Size Forecast
 - 12.3.1.1.1.By Value
 - 12.3.1.2.Market Share Forecast

- 12.3.1.2.1.By Offering
- 12.3.1.2.2.By Technology
- 12.3.1.2.3.By Workflow
- 12.3.1.2.4.By Sample
- 12.3.1.2.5.By Circulating Biomarker
- 12.3.1.2.6.By Application
- 12.3.1.2.7.By End User
- 12.3.2.Saudi Arabia Liquid Biopsy Market Outlook
 - 12.3.2.1.Market Size Forecast
 - 12.3.2.1.1.By Value
 - 12.3.2.2.Market Share Forecast
 - 12.3.2.2.1.By Offering
 - 12.3.2.2.2.By Technology
 - 12.3.2.2.3.By Workflow
 - 12.3.2.2.4.By Sample
 - 12.3.2.2.5.By Circulating Biomarker
 - 12.3.2.2.6.By Application
 - 12.3.2.2.7.By End User
- 12.3.3.UAE Liquid Biopsy Market Outlook
 - 12.3.3.1.Market Size Forecast
 - 12.3.3.1.1.By Value
 - 12.3.3.2.Market Share Forecast
 - 12.3.3.2.1.By Offering
 - 12.3.3.2.2.By Technology
 - 12.3.3.2.3.By Workflow
 - 12.3.3.2.4.By Sample
 - 12.3.3.2.5.By Circulating Biomarker
 - 12.3.3.2.6.By Application
 - 12.3.3.2.7.By End User

13.MARKET DYNAMICS

- 13.1.Drivers
- 13.2.Challenges

14.MARKET TRENDS DEVELOPMENTS

- 14.1.Merger Acquisition (If Any)
- 14.2.Product Launches (If Any)

14.3.Recent Developments

15.PORTERS FIVE FORCES ANALYSIS

15.1.Competition in the Industry

15.2.Potential of New Entrants

15.3.Power of Suppliers

15.4.Power of Customers

15.5.Threat of Substitute Products

16.COMPETITIVE LANDSCAPE

16.1.F. Hoffmann-La Roche Ltd

16.1.1.Business Overview

16.1.2.Company Snapshot

16.1.3.Products Services

16.1.4.Financials (As Reported)

16.1.5.Recent Developments

16.1.6.Key Personnel Details

16.1.7.SWOT Analysis

16.2.Thermo Fisher Scientific, Inc.

16.3.PerkinElmer Inc.

16.4.LungLife AI, Inc.

16.5.Illumina, Inc.

16.6.QIAGEN NV

16.7.NeoGenomics Laboratories, Inc.

16.8.Myriad Genetics, Inc.

16.9.Bio-Rad Laboratories, Inc.

16.10. Guardent Health Inc.

16.11. Natera, Inc.

16.12. Sysmex Corporation

16.13. Abcodia Ltd.

16.14. Dxcover Limited

17.STRATEGIC RECOMMENDATIONS

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