

Pan-genomic and Multi-gene Panel Testing Market Size, Share and Growth Outlook 2026: By Test Type, By Application Category, By End Use, Companies to 2034

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Abstracts

The global Pan-genomic and Multi-gene Panel Testing Market size is forecast to increase from \$10.58 Billion in 2026 to \$26.5 Billion in 2034 at a CAGR of 12.16% between 2026 and 2034.

The Pan-genomic and Multi-gene Panel Testing market report provides detailed analysis and outlook of Pan-genomic and Multi-gene Panel Testing segments including By Test Type (Oncology Multi-Gene Panels, Pan-Genomic / Whole Exome Based Panels, Comprehensive Hereditary Disease Panels, Pharmacogenomics (PGx) Panels), By Application Category (Oncology, Rare and Undiagnosed Genetic Diseases, Neurology and Neurogenetics, Cardiology and Cardiomyopathy, Reproductive Carrier Screening, Newborn and Pediatric Genomics), By End Use (Hospital-based Genetic Laboratories, Independent Diagnostic Laboratories, Specialty Genomic Centers and Research Institutes) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Pan-genomic and Multi-gene Panel Testing Industry Overview

Comprehensive Genomic Profiling and Multiomic Testing Are Expanding the Scope of Precision Oncology

The pan-genomic and multi-gene panel testing industry is rapidly advancing as precision oncology shifts from single-gene analysis toward comprehensive genomic,

epigenomic, and multiomic profiling. Clinical laboratories and research organizations are increasingly integrating whole-genome sequencing, liquid biopsy, tissue-based genomic testing, methylation analysis, and minimal residual disease (MRD) monitoring into unified diagnostic workflows that support therapy selection, disease surveillance, and early detection of recurrence. Growing adoption of high-throughput sequencing platforms, artificial intelligence-assisted analytics, and distributed genomic workflows is enabling clinicians to identify actionable biomarkers with greater sensitivity while improving personalized treatment strategies across diverse solid tumors.

Whole-Genome Sequencing and MRD Technologies Improve Cancer Monitoring

The industry is witnessing significant innovation in ultra-sensitive genomic surveillance technologies capable of detecting residual disease at extremely low levels. Illumina introduced a new whole-genome sequencing research workflow built on its NovaSeq X platform to support highly sensitive tumor-informed MRD detection. Developed in collaboration with academic institutions including the Mayo Clinic, the distributed workflow enables researchers to analyze solid tumor samples with detection sensitivity reaching single-digit parts-per-million ranges, supporting broader implementation of whole-genome sequencing for longitudinal cancer monitoring. These developments demonstrate the industry's movement toward scalable genomic workflows that combine high sequencing accuracy with advanced analytical performance for clinical oncology research.

Multiomic Liquid Biopsy and Tissue Profiling Strengthen Precision Medicine

Clinical adoption is increasingly centered on integrating liquid biopsy and tissue-based genomic analysis to guide personalized treatment decisions. Guardant Health presented extensive clinical evidence across major oncology meetings demonstrating the expanding role of its Guardant360 Liquid CDx as a comprehensive pan-cancer companion diagnostic. Research presented at ASCO highlighted the platform's ability to identify actionable biomarkers in advanced solid tumors through combined genomic, methylation, and multiomic analyses that support targeted therapy selection. Complementary studies presented ahead of the AACR meeting demonstrated how Guardant Reveal can identify new primary malignancies during MRD monitoring, while Guardant360 Tissue evaluates genomic instability scores to detect DNA repair deficiencies in breast, ovarian, and pancreatic cancers. Together, these advances illustrate the growing convergence of liquid biopsy, tissue genomics, whole-genome sequencing, and multiomic biomarker analysis, enabling more comprehensive

molecular characterization and improving clinical decision-making throughout the cancer care continuum.

Pan-genomic and Multi-gene Panel Testing Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Pan-genomic and Multi-gene Panel Testing market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Illumina, Inc., Thermo Fisher Scientific, Inc., Foundation Medicine, Inc. (Roche Group), Guardant Health, Inc., Natera, Inc., Invitae Corporation / GeneDx, Fulgent Genetics, Inc., Ambry Genetics (Tempus), Caris Life Sciences, Qiagen N.V.. The Pan-genomic and Multi-gene Panel Testing market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Pan-genomic and Multi-gene Panel Testing industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Pan-genomic and Multi-gene Panel Testing Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Pan-genomic and Multi-gene Panel Testing companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Pan-genomic and Multi-gene Panel Testing markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and

long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Pan-genomic and Multi-gene Panel Testing Market Competitive Benchmarking and Company Analysis

Leading companies in Pan-genomic and Multi-gene Panel Testing industry include- Illumina, Inc., Thermo Fisher Scientific, Inc., Foundation Medicine, Inc. (Roche Group), Guardant Health, Inc., Natera, Inc., Invitae Corporation / GeneDx, Fulgent Genetics, Inc., Ambry Genetics (Tempus), Caris Life Sciences, Qiagen N.V.. The Pan-genomic and Multi-gene Panel Testing market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Pan-genomic and Multi-gene Panel Testing Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Pan-genomic and Multi-gene Panel Testing market remains one of the strongest-performing segments in the country.

The US Pan-genomic and Multi-gene Panel Testing Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Pan-genomic and Multi-gene Panel Testing market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities

exist across Pan-genomic and Multi-gene Panel Testing industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Pan-genomic and Multi-gene Panel Testing markets

Canada's strong Pan-genomic and Multi-gene Panel Testing sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Pan-genomic and Multi-gene Panel Testing market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Pan-genomic and Multi-gene Panel Testing Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Pan-genomic and Multi-gene Panel Testing market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Pan-genomic and Multi-gene Panel Testing population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Pan-genomic and Multi-gene Panel Testing industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Pan-genomic and Multi-gene Panel Testing market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Pan-genomic and Multi-gene Panel Testing sales through 2034

France Pan-genomic and Multi-gene Panel Testing companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Pan-genomic and Multi-gene Panel Testing Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Pan-genomic and Multi-gene Panel Testing distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Pan-genomic and Multi-gene Panel Testing Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Pan-genomic and Multi-gene Panel Testing market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Pan-genomic and Multi-gene Panel Testing industry, offering opportunities for both competition and partnership. Over the forecast period, new and

innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Pan-genomic and Multi-gene Panel Testing industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Pan-genomic and Multi-gene Panel Testing Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Pan-genomic and Multi-gene Panel Testing market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Pan-genomic and Multi-gene Panel Testing market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Pan-genomic and Multi-gene Panel Testing Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Pan-genomic and Multi-gene Panel Testing Market Segmentation

By Test Type

Oncology Multi-Gene Panels

Pan-Genomic / Whole Exome Based Panels

Comprehensive Hereditary Disease Panels

Pharmacogenomics (PGx) Panels

By Application Category

Oncology

Rare and Undiagnosed Genetic Diseases

Neurology and Neurogenetics

Cardiology and Cardiomyopathy

Reproductive Carrier Screening

Newborn and Pediatric Genomics

By End Use

Hospital-based Genetic Laboratories

Independent Diagnostic Laboratories

Specialty Genomic Centers and Research Institutes

Leading Companies in Pan-genomic and Multi-gene Panel Testing Industry (2026)

Illumina, Inc.

Thermo Fisher Scientific, Inc.

Foundation Medicine, Inc. (Roche Group)

Guardant Health, Inc.

Natera, Inc.

Invitae Corporation / GeneDx

Fulgent Genetics, Inc.

Ambry Genetics (Tempus)

Caris Life Sciences

Qiagen N.V.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,
Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,
Other Africa

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Fulgent Genetics, Inc.

Ambry Genetics (Tempus)

Caris Life Sciences

Qiagen N.V.

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