

Global Spatial Omics Market to Reach \$842.73 Million by 2032, Growing at a CAGR of 10.30%

Breakthrough Technologies and Rising Adoption in Cancer Research and Drug Development Drive Spatial Omics Market Growth

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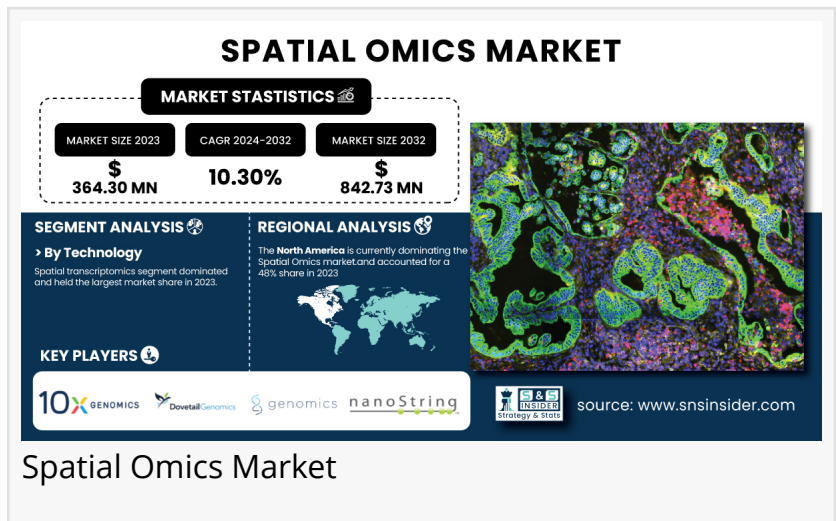
According to Research by SNS Insider, The [Spatial Omics Market](#) size was valued at USD 364.30 million in 2023 and is Projected to rise at a CAGR of 10.30%, and is expected to reach USD 842.73 million by 2032. The global

spatial omics market is growing at an unprecedented rate, owing to genomic technology developments and increasing focus on precision medicine.

Market analysis

Spatial omics represent a transformative frontier in life sciences, integrating advanced imaging technologies with high-throughput molecular profiling. This enables researchers to analyze biomolecules within their spatial context in tissues. As precision medicine continues to gain prominence, the demand for spatial omics technologies has surged, driven by the need to better understand disease mechanisms and identify targeted therapies.

Governments globally are increasingly supporting genomics research and healthcare innovations. For instance, the National Institutes of Health (NIH) allocated over USD 3.8 billion for precision medicine initiatives in 2022, fueling the adoption of spatial omics technologies in the U.S. Similarly, the European Union's Horizon Europe program has invested significantly in omics research, facilitating regional advancements in this domain. Chronic conditions such as cancer, cardiovascular diseases, and neurological disorders have increased the demand for advanced research tools like spatial omics. According to the World Health Organization (WHO), non-communicable diseases account for 74% of all deaths globally, underscoring the need for precision medicine solutions. Innovations in imaging and molecular profiling technologies have significantly enhanced the accuracy and efficiency of spatial omics workflows, making them more accessible to researchers and clinicians.



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Key Players in Spatial Omics Market

- 10x Genomics
- Dovetail Genomics (Cantata Bio.)
- S2 Genomics, Inc.
- NanoString Technologies, Inc.
- Seven Bridges Genomics
- PerkinElmer, Inc.
- Bio-Techne
- Danaher Corporation
- Ionpath, Inc.
- Millennium Science Pty Ltd.
- Akoya Biosciences, Inc.
- Standard BioTools
- Diagenode Diagnostics (Hologic, Inc.)
- Biognosys
- Rebus Biosystems, Inc.
- Ultivue, Inc.
- BioSpyder, Inc.
- Bruker
- RareCyte, Inc.

Segment Analysis

By Product

In 2023, the spatial omics market was dominated by the consumables segment, which accounted for over 50% of the market share. Consumables are reagents, kits, and other materials used to perform spatial omics experiments. Consumables are in high demand as they are repeatedly used for workflows such as tissue staining, library preparation, molecular profiling, and others. With research institutions and biopharmaceutical companies increasingly moving towards genomic research onto a much larger scale, the consumables market is expected to witness impressive growth.

By Technology

Spatial transcriptomics accounted for the highest share of the market in 2023. Spatial transcriptomics gives us a comprehensive view of gene expression in space, but still working to fully understand cellular behaviours during health and disease. One of the key factors fuelling the growth of this segment of the global spatial transcriptomics market is the increasing adoption of spatial transcriptomics in cancer research, especially in studies related to tumor microenvironment. Moreover, the development of single-cell and multiplexed transcriptomics as technological innovations have further increased the general value of this technique for research

and clinical applications.

By Workflow

The sample preparation segment accounted for the largest market share in 2023 with a share of 36% of the market. This part of the workflow encompasses all of the critical steps in the process of preparing tissue specimens, such as fixation, staining, and imaging, which ultimately leads to high-quality spatial omics data. Advances in automated sample preparation techniques and the introduction of standardized protocols have streamlined workflows, increasing the adoption of spatial omics technologies across research and clinical laboratories.

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Spatial Omics Market Segmentation

By Technology

- Spatial Transcriptomics
- Spatial Genomics
- Spatial Proteomics

By product

- Instruments
- Consumable
- Software

By Application

- Diagnostics
- Translation Research
- Cell Biology
- Single Cell Analysis

By Workflow

- Sample Preparation
- Instrumental Analysis
- Data Analysis

Regional Analysis

In 2023, the spatial omics market was dominated by North America, representing 48% of the market. The proliferation of prominent biotechnology and pharmaceutical companies, large-scale government investments in genomics research, and powerful healthcare infrastructure have engineered a leadership position for the region. There has been significant investment in precision medicine programs in the U.S., such as the All of Us Research Program which is driving the speed of implementation for spatial omics technologies. Additionally, high incidences of chronic diseases such as cancer and neurodegenerative disorders have driven demand for

innovative research tools like spatial omics.

Europe accounts for a significant portion of the spatial omics market with the support of government, as well as academic and industrial collaborations for example, the European Union Horizon Europe program has been investing large amounts of funding for research on omics technologies. Countries like Germany, the U.K., and France have become powerful centers for genomics research, with growing embracement of spatial omics to investigate disease mechanisms and drug discovery.

The growth of the Asia-Pacific region will be the highest rate in the forecast period, which is increasing investment in healthcare infrastructure, increasing chronic diseases, and growing interest in precision medicine. For instance, China, Japan, and India are in the vanguard of this growth with efforts to set up biobanks and genomic research centers. For instance, China's Precision Medicine Initiative, backed by billions of dollars in funding, has accelerated the adoption of spatial omics technologies in the region.

Recent Developments

- In Nov 2023, NanoString Technologies announced the release of a new spatial omics platform that aims to increase the resolution and throughput of spatial profiling. We expect this innovation to promote a wider spread of spatial omics technologies in both academic and clinical research laboratories.
- In October 2023, 10x Genomics launched an innovative spatial transcriptomics kit for high-throughput applications. It was developed for large-scale studies in oncology and immunology, providing high-resolution spatial data, which is increasingly used in research.
- In September 2023, Akoya Biosciences announced their latest system for multiplex imaging, which offers both spatial proteomic and transcriptomic capabilities. Its goal is to speed up biomarker discovery & drug development initiatives.

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