

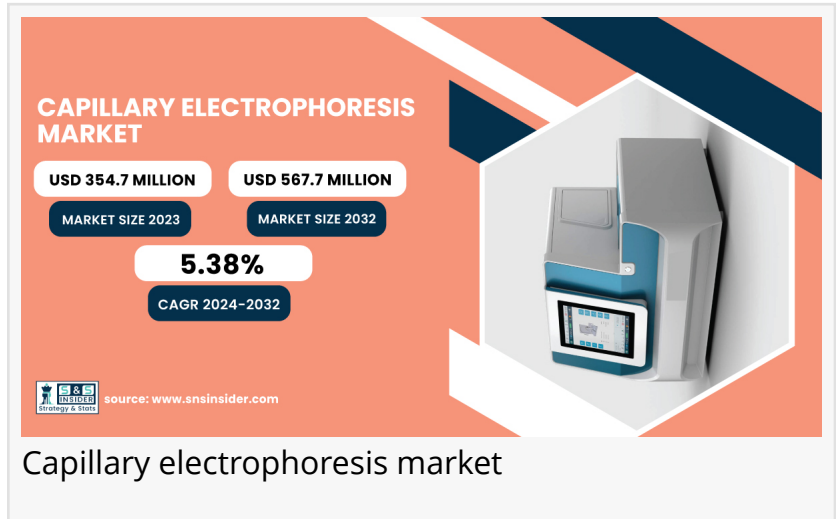
Capillary Electrophoresis Market to Surpass USD 567.7 Million by 2032 | SNS Insider

Market expansion driven by advancements in analytical techniques, increased genomic research funding, and rising demand in pharmaceutical and biotech sectors.

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According to Research by SNS Insider, The [Capillary electrophoresis market](#) was valued at approximately USD 354.7 million in 2023 and is projected to reach USD 567.7 million by 2032,

growing at a Compound Annual Growth Rate (CAGR) of 5.38% during the forecast period.



Market analysis

The global capillary electrophoresis market is witnessing significant growth, driven by rapid advancements in biotechnology, increasing applications in pharmaceuticals, and a rising demand for high-resolution molecular analysis. Capillary electrophoresis is an important technique in the field of genetic studies, as it is capable of performing accurate sequencing of DNA and RNA as well as analyzing proteins and discovering new biomarkers. Moreover, the burgeoning demand for precise diagnostics, especially in the fields of oncology and infectious diseases, is also propelling the market growth. Microchip-based electrophoresis is one example of a technological innovation leading to increased efficiency via rapid, high-throughput analysis methods with limited sample consumption. The accuracy and reproducibility of current capillary electrophoresis systems is also being improved, complementing the integration of automation and artificial intelligence.

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Key Players in Capillary Electrophoresis Market

- Agilent Technologies, Inc. (2100 Bioanalyzer, 7100 Capillary Electrophoresis System)
- Bio-Rad Laboratories, Inc. (ZE5 Cell Analyzer, Bio-Plex 200 System)
- Thermo Fisher Scientific Inc. (Capillary Electrophoresis Sequencing System, Qubit)

Fluorometer)

- PerkinElmer, Inc. (LabChip GX Touch, Spectrum Two FT-IR Spectrometer)
- Danaher Corporation (PA 800 Plus Pharmaceutical Analysis System, CESI 8000 Plus)
- Becton, Dickinson and Company (FACSMelody Cell Sorter, FACSsymphony Flow Cytometer)
- QIAGEN N.V. (QIAxcel Advanced System, QIAcube Connect)
- Merck KGaA (Milli-Q Water Purification Systems, Spectroquant Prove)
- Shimadzu Corporation (MultiNA Microchip Electrophoresis System, Nexera Series)
- Hitachi High-Tech Corporation (DS3000 Capillary Electrophoresis System, Chromaster HPLC)
- Harvard Bioscience, Inc. (P/ACE MDQ Plus Capillary Electrophoresis System, BTX ECM 830 Electroporation System)
- LabSmith, Inc. (HVS448 High Voltage Sequencer, SVM340 Synchronous Video Microscope)
- Advanced Analytical Technologies, Inc. (Fragment Analyzer, FEMTO Pulse)
- BioOptic Inc. (Qsep100 DNA Analyzer, Qsep1-Lite)
- Micronit Microtechnologies B.V. (Microfluidic Chips, Lab-on-a-Chip Platforms)
- Scienion AG (sciFLEXARRAYER, sciDROP PICO)
- Dolomite Microfluidics (Mitos P-Pump, Telos System)
- MicroLab Devices (Microfluidic Devices, Lab-on-a-Chip Systems)
- BioFluidix GmbH (PipetteJet Nanodispenser, BioSpot Workstation)
- Fluigent SA (MFCS-EZ Pressure Controller, LineUp Series)

Market Segmentation

By Product

Consumables held the largest revenue share of 70% in the global capillary electrophoresis market in 2023. These include critical items like capillaries, reagent, buffers, and sample vials, which are used frequently and need to be replaced giving an edge in the routine stability, and perfect functioning of CE systems. There is a constant and growing need for these consumables which creates continuous interest from manufacturers. Further driving the growth and use of CE systems across diagnostics, pharmaceuticals, and research sectors, are improvements in consumables technologies, such as reagent lability, sensitivity, and specificity. Instrument Segment will also register a significant growth during the forecast period. Such growth is powered by progress in biotechnology, pharmaceutical research, clinical diagnostics, and food safety.

By Mode

The largest share of 48% in 2023 was held by the capillary gel electrophoresis (CGE) market. CGE has become more popular, as it provides fast characterizations of proteins, as well as purity and aggregation tests, that are critical throughout biopharmaceutical development and quality assessments. The combination of CGE platforms with integrated workflows and throughput efficiencies makes electrophoresis-based analyses more accessible to academic, clinical, and commercial laboratories; advancing productivity and efficiency overall. New innovations like microchip-based CGE and automated platforms are widening its applications and market adoption as well. The capillary electrochromatography (CEC) segment is expected to be high

growth segment over the forecast period. CEC not only provides higher efficiency but also enhanced selectivity, which makes it useful for analysis of complex samples. Driven by growing demand in pharmaceutical research, proteomics, and environmental monitoring, its growth is propelled. Recent developments in columns, micro-scale columns and integration with mass spectrometry are enhancing the scope and applications of CEC.

By Application

In 2023, the nucleic acid analysis segment dominated the market, with accounted the largest share at 27%. Capillary electrophoresis plays a vital role in nucleic acid analysis, offering high-resolution separation and quantification of DNA and RNA fragments. Such an application is important in diverse areas like genetic studies, clinical diagnostics, and forensic science. Factors such as the rising incidence of genetic disorders, along with the surging demand for personalized medicine, are also encouraging the adoption of CE in nucleic acid analysis. In addition, the development of CE technologies, including detection methods and automation, is improving the precision and efficiency of nucleic acid analysis. Capillary electrophoresis also has one particular significant application aspect, namely that of protein analysis. CE serves to separate and characterize proteins with precision, which is crucial for understanding their functions and interactions. This has direct applications in drug development, disease diagnosis, and proteomics research.

By End Use

In 2023, research organizations and institutes accounted for the highest market share of 53%. These organizations are heavy users of capillary electrophoresis for a wide range of research applications, spanning molecular biology, genetics and biochemistry. Its power of high-resolution analysis of biomolecules provides an indispensable tool to academia and research units. The government funding and continuous R&D investments, by various institutions to overcome limitations of conventional analytical techniques, are therefore providing significant impetus for the expected high adoption of CE in the upcoming years. Another end-user of capillary electrophoresis is pharmaceutical and biotechnology companies. They use CE for drug development processes, quality control, and biopharmaceutical product validation.

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Regional Analysis

In 2024, North America captured the highest market share of 40% of global capillary electrophoresis market. This dominance is attributed to the region's strong healthcare infrastructure, substantial investment in research and development, as well as the presence of key market players. In terms of revenue, the United States is expected to dominate the global market. Asia Pacific region is growing with significant CAGR, Demand for capillary electrophoresis solutions in the Asia-Pacific region will be primarily driven by China and India, owing to a growing number of research establishments and a high willingness to invest in high-performing instruments. Moreover, the growth in the China market is massive at a high CAGR.

The market expansion in this region can also be attributed to several factors including rapid industrialization, rising investment in healthcare infrastructure, and the growing focus on research activities.

Recent Developments

In 2024, Agilent Technologies introduced dynamically coated capillaries designed to enhance separation efficiency and reproducibility in capillary electrophoresis applications.

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