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Next Generation Sequencing (NGS) Market by Product (Consumables, Platforms, and Services) Application (Biomarkers & Cancer, Diagnostics, Reproductive Health, Personalized Medicine, Agriculture & Animal Research, and Other Applications), Technology (Sequencing by Synthesis, Ion Semiconductor Sequencing, Sequencing by Ligation, Pyrosequencing, Single Molecule Real Time Sequencing, and Other Technologies), and End User (Academic & Clinical Research Centers, Pharmaceutical & Biotechnology Companies, Hospitals & Clinics, and Other End User): Global Opportunity Analysis and Industry Forecast, 2019–2026

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Abstracts

The global next generation sequencing market size was valued at $4,533 million in 2018, and is estimated to reach $18,565 million by 2026, growing at a CAGR of 19.2% from 2019 to 2026.

Next generation sequencing (NGS) is a novel procedure for sequencing genomes at low costs and high speed with improved efficiency. NGS also known as deep sequencing and parallel sequencing is a technology that has revolutionized molecular biology and genomics research. It is a high throughput, non-Sanger based sequencing method.

Next generation sequencing has made sequencing of genomes very rapid and cost-effective. Through this method, billions of DNA strands can be sequenced efficiently. Next generation sequencing has made it possible to conveniently sequence whole genomes, and analyze various DNA-protein interactions. This technique allows the researcher to focus, study, and interpret deep sequence target regions. Next generation sequencing can be utilized through varied interventions such as oncology, biomarker studies, drug discovery, understanding reproductive health, and personalized genomics.

Technological advancements in sequencing platforms, surge in applications of next generation sequencing, and increase in genome mapping programs drive the growth of the global next generation sequencing market. In addition, rise in awareness pertaining to next generation sequencing and increase in investment in research, development, and innovation supplement the market growth. However, lack of skilled professionals, ethical & legal limitation related to next generation sequencing, and standardization concerns in sequencing procedures impede the market growth. Furthermore, use of cloud computing as a potential data management service and untapped emerging economies offer lucrative opportunities for the market players.

The next generation sequencing market is segmented based on product, application, technology, end user, and region. Based on product, the market is divided into consumables, platforms, and services. The consumables product segment is further bifurcated as sample preparation consumables and other consumables. The sample preparation consumables are further segmented into DNA fragmentation, end repair, A-Tailing & size selection, library preparation & target enrichment, and quality control. The platform NGS product segment is classified into HiSeq, MiSeq, Ion Torrent, SOLiD, Pacbio Rs II & Sequel System, and other sequencing platforms. The services segment is divided into sequencing services and data management services. The sequencing services is further divided into RNA Sequencing, Whole Exome Sequencing, Whole Genome Sequencing, Targeted Sequencing, Chip Sequencing, De Novo Sequencing, and Methyl Sequencing. The data management services further divided into NGS data analysis services, NGS data analysis software & workbenches, and NGS storage, management & cloud computing solutions. Based on application, the market is divided into diagnostics, biomarkers and cancer, reproductive health, personalized medicine, agriculture and animal research, other applications. By Technology, market is segmented into sequencing by synthesis, ion semiconductor sequencing, sequencing by ligation, pyrosequencing, single molecule real time sequencing, and other technologies. Depends on end user, market is categorized into academic & clinical research centers, pharmaceutical & biotechnology companies, hospitals & clinics, and other end user. Based on region, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Based on region, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA. North America accounted for the largest market share in the next generation sequencing market in 2015, and is expected to retain its dominance throughout the forecast period. This is primarily attributed to higher buying power, availability, and applications that favor the utilization of NGS in this region. There is also an increase in agreements and collaborations between different market players and health centers to promote and utilize NGS in this region. However, Asia-Pacific is expected to emerge as a lucrative area with maximum growth potential, owing to the improvement in R&D facilities, available disposable income, and rapidly developing economic conditions.

Product development is the key strategy adopted by market players. The report provides a comprehensive analysis of the key players that operate in the global next generation sequencing market.

KEY MARKET BENEFITS

The study provides an in-depth analysis of the global next generation sequencing market along with the current trends and future estimations to elucidate the imminent investment pockets.

The report presents quantitative analysis of the market for the period of 2014–2022 to enable stakeholders to capitalize on the prevailing market opportunities.

Extensive analysis of the market based on product type assists in understanding the trends in the industry.

Key market players along with their strategies are thoroughly analyzed to understand the competitive outlook of the industry

KEY MARKET SEGMENTS

By Product

Consumables

Sample Preparation Consumables

DNA Fragmentation, End Repair, A-Tailing and Size Selection

Library Preparation & Target Enrichment

Quality Control

Other Consumables

Platforms

HiSeq

MiSeq

Ion Torrent

SOLiD

Pacbio Rs II and Sequel System

Other Sequencing Platforms

Services

Sequencing Services

RNA Sequencing

Whole Exome Sequencing

Whole Genome Sequencing

Targeted Sequencing

Chip Sequencing

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De Novo Sequencing

Methyl Sequencing

Data Management Services

NGS Data Analysis Services

NGS Data Analysis Software & Workbenches

NGS Storage, Management and Cloud Computing Solutions

By Application

Diagnostics

Biomarkers and Cancer

Reproductive Health

Personalized Medicine

Agriculture and Animal Research

Other Applications

By Technology

Sequencing by Synthesis

Ion Semiconductor Sequencing

Sequencing by Ligation

Pyrosequencing

Single Molecule Real Time Sequencing

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Other Technologies

By End User

Academic and Clinical Research Centers

Pharmaceutical and Biotechnology Companies

Hospitals and Clinics

Other End User

By Region

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U.S.

Canada

Mexico

Europe

Germany

France

UK

Italy

Spain

Rest of Europe

Asia-Pacific

Japan

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China

Australia

India

South Korea

Taiwan

Rest of Asia-Pacific

LAMEA

Brazil

Turkey

Saudi Arabia

South Africa

Rest of LAMEA

KEY PLAYERS PROFILED

Illumina, Inc.

Thermo Fisher Scientific, Inc.

Pacific Biosciences of California, Inc.

Beijing Genomics Institute

Qiagen N.V.

454 Life Sciences Corporation (Roche Holding AG)

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Agilent Technologies, Inc.

Perkinelmer, Inc.

Genomatix GmbH

PierianDx

Other players in the value chain include (profiles not included in the report)

Eurofins Scientific

Gatc Biotech AG

Macrogen, Inc.

Oxford Nanopore Technologies, Ltd.

Bio-Rad Laboratories, Inc.

DNASTAR, Inc.

Biomatters Ltd.

Partek Inc.

New England Biolabs, Inc.

Myriad Genetics, Inc.

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