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The Chinese Market for DNA Sequencing

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Abstracts

REPORT SCOPE:

The scope of the report includes sequencing technologies, applications, industries, initiatives, markets and companies in China. The markets for sequencing products and services are given for 2016, 2017 and 2022.

This report covers the Chinese sequencing market by workflow, including sample preparation products, sequencing instruments and consumables, informatics and sequencing services. It includes the Chinese sequencing instrument market by platform (i.e., Sanger and next-generation technologies) and by instrument class (i.e., low-throughput, high-throughput, benchtop, handheld).

In this report, “China” refers to Mainland China. This does not include Hong Kong, Macao and Taiwan. Mainland China has a total of 31 province-level regions, including 22 provinces, four province-level municipalities (cities) and five province-level autonomous regions. Important regional markets will be discussed, including Beijing, Shanghai and Guangdong.

More than 100 Chinese companies in the sequencing industry are profiled in this report.

REPORT INCLUDES:

- 91 tables
- An in-depth analysis of the Chinese DNA sequencing market, an important sector in life sciences with enormous market potential
- Analyses of market trends, with data from 2016 and 2017, and projections of

compound annual growth rates (CAGRs) through 2022

Quantification of the DNA sequencing market by product type, platform, customer type, value chain position, analysis type, and region

A look at the substantial growth opportunities for industry participants, including consumer and diagnostic sequencing services, bioinformatics, sequence enrichment, benchtop NGS sequencers and consumables, and emerging sequencing instruments

Comprehensive discussion covering sequencing technologies, market applications, industry structure, and important clinical sequencing initiatives

Company profiles of major Chinese companies in the sequencing industry, including Gene Denovo, IGE Biotechnology Ltd., Pacific Biosciences, Beijing Genomics Institute (BGI), and Adicon Clinical Laboratories, Inc.

EXECUTIVE SUMMARY

Since the previous edition of this report published in September 2016, the Chinese DNA sequencing market has had many significant developments, including:

Revenues of leading companies maintained fast growth through mid-2018. This indicates the high growth rate (i.e., a CAGR of REDACTED). BCC Research forecast in the previous edition of thisreport that this growth rate was likely to continue.

On October 27, 2016, the Chinese government removed restrictions on NIPT services. Any medical body qualified for prenatal examination in China is now allowed to do NIPT without additional governmental approval. This removed the main obstacle to the Chinese NIPT sequencing market.

The number of newly-established sequencing companies in 2016 and 2017 was smaller than in 2014 and 2015. New entrants had less opportunity while older players led the market.

Companies founded in 2014 and 2015 received funding from angel investment and series of A/B rounds. Investors from both inside and outside China showed their great interest in the fastgrowing Chinese DNA sequencing market because the earnings outlook has become clearer than before. More than $1 billion was invested in burgeoning Chinese sequencing companies in 2017. Some of the older players closed or moved to other services. Market opportunity always comes with risks.

Large sequencing service providers are developing their own equipment, whereas equipment distributors are beginning to provide sequencing services. The upstream and downstream industries interact and intertwine with one another.

When NovaSeq launched in early 2017, Novogene decided to buy 25 sets of NovaSeq machines. With three sets of HiSeq X Ten and the Novogene sequencers, Novogene currently leads the game of instrument investment in China. As a result, Novogene strengthens its leading position in the sequencing service market, especially in the R&D service market.

Sequencing companies from major cities such as Beijing, Shanghai and Shenzhen, where the Chinese DNA sequencing industry begun, are now penetrating other Chinese cities. Tianjin, Chengdu and Chongqing have shown significant potential for strong growth.

Cooperation, acquisitions and mergers are changing the image of the industry, thus increasing competition while producing new opportunities to industry players.

This chapter provides a summary of the Chinese DNA sequencing market. It also discusses the largest and the fastest-growing markets and important governmental targets and regulations.

The Chinese sequencing industry experienced significant changes as the market grew in recent years. When the industry started in China before 2010, demand from government-sponsored R&D projectswas its main driving force. In 2010, noninvasive prenatal testing (NIPT) came to the market, starting the fast growth of the clinical application segment in the following three years. The NIPT service, however, was interrupted by the government in early 2014. In mid-2014, the government only approved a few companies for providing NIPT services to the Chinese market.

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Guangdong
ANCHORDX
BURNING ROCK
DAAN GENE
DARUI BIOTECHNOLOGY CO. LTD.
EZLIFE
FOREVER GEN
GENE DENOVO
IGE
KINGMED DIAGNOSTICS CENTER CO. LTD.
LINKED BIOTECH
MAGIGEN
RIBOBIO
TOP GENE
Shenzhen
BGI
DIRECT GENOMICS
HAPLOX
HYK GENE TECHNOLOGY CO. LTD.
IMUNO BIOTECH CO. LTD.
MACROGEN
MICROBIOTA
TGS
YUCEBIO CO. LTD.
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BIOMARKER
BOHENG

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GENEDOCK
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GENETRON
GENNLIFE
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HKGI
HONOR TECH
HUANIU BIOTECHNOLOGY
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JABREHOO
LUCIDUS
MICROHELIX GENE
MICROREAD
MYGENOSTICS
NOVOGENE BIOINFORMATICS TECHNOLOGY CO. LTD.
ORIGENE CHINA
QUANTI HEALTH
QY NODE
READER BIOINFORMATICS
SANVALLEY
SCISOON
SINOGENOMAX
SINOMDGENE
SINOPATH
SOLOMEN BROTHERS
VISHUOS
YIKON GENOMICS CO. LTD.
Shanghai
3D MEDICINES CORPORATION
ACCURAGEN INC.
ADICON CLINICAL LABORATORIES

BASETRA SHANGHAI
BENEGENE
BIOGENIUS
BIOON
BIOREFER
BIOTECAN
BIOTECHNOLOGY SHANGHAI
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CLOUDHEALTH MEDICAL GROUP LTD.
FIND BIO-TECH
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TINYGENE
TRI-I
UNIMED DIAGNOSTIC TECHNOLOGY LTD.
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XINPEIJING
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YINGBIO
ZI BIO TECH
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DIAN DIAGNOSTICS
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HANGZHOU MITIAN GENE TECHNOLOGY CO. LTD.
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HANGZHOU RUICHUANG BIOTECHNOLOGY CO. LTD.
HANGZHOU SHENGTING BIOTECH CO. LTD.
NEW HORIZON HEALTH
ZHEJIANG TIANKE HI-TECHNOLOGY DEVELOPMENT CO. LTD.
Jiangsu
BASECARE
BIONOVOGENE
CYAGEN
GENESEEQ
GENESKY
GENEWIZ
SUPERBIO
SUZSHOU BIOMEDICAL RESEARCH AND DEVELOPMENT CENTERS
Hubei
ABLIFE INC.
BENAGEN
FRASERGEN
GENEOCEAN
KINDSTAR
NEXTOMICS
Other Provinces
23MOFANG
RHONIN
ZIXIN PHARMACEUTICAL INDUSTRIAL CO. LTD.

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BIOSAN
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CYGNUS
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DARUI BIOTECHNOLOGY CO. LTD.
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EMEI TONGDE
EZlife
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FRASERGEN
GEMPLE
Gene Denovo
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GENEOCEAN
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Haplox

HIKEWELL
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HONOR TECH
HUANIU BIOTECHNOLOGY
HUASHENG HENGYE
HUAYIGENOMICS
HYK Gene Technology Co. Ltd.
IGE
IGENETECH
IMH BIO
IMUNO BIOTECH CO. LTD.
IPE
JABREHOO
JIAYIN
KANGCHEN BIO-TECH
KINDSTAR
KINGMED DIAGNOSTICS CENTER CO. LTD.
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LUCIDUS
Macrogen
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