

Asia-Pacific and Middle East NGS Market: Focus on Offering, Platform, Throughput, Technology Type, Application, End User, and Country Analysis - Analysis and Forecast, 2022-2027

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Abstracts

Asia-Pacific and Middle East NGS Market Industry Overview

The Asia-Pacific and Middle East NGS market was valued at \$1,055.6 million in 2022 and is anticipated to reach \$2,370.7 million by 2027, witnessing a CAGR of 17.56% during the forecast period 2022-2027. The market is driven by factors such as the increasing adoption of NGS in various research and diagnostics fields, growing prevalence of non-communicable disorders, and advancement in the performance of NGS platforms.

Market Lifecycle Stage

The Asia-Pacific and Middle East NGS market is highly consolidated. This market still holds significant potential for growth as technological developments in NGS platforms and initiatives to integrate genomics in healthcare are ongoing.

The opportunity for growth of the Asia-Pacific and Middle East NGS market lies in development of economical and portable technologies.

Impact of COVID-19

Next-generation sequencing (NGS)-based products are widely employed in research and diagnosis of diseases such as cancer, as well as providing cancer patients with appropriate and individualized therapy. Because the market is dominated primarily by

manufacturers of next-generation sequencing instruments, kits, and assays, as well as service providers that provide gene panels and testing services using next-generation sequencing for oncology, the pandemic had a negative impact on the market's revenue growth.

However, during the COVID-19 pandemic, next-generation sequencing (NGS) and analytics were increasingly employed for sequencing the SARS-CoV-2 virus, to track its mutations, and manage population health. For example, in October 2022, Kyrgyzstan began building next-generation sequencing capabilities for SARS-CoV-2. Leaders in this sequencing industry have predicted a greater push toward local manufacturing rather than its dependency on import activities. The pandemic revealed cracks in the supply chain, prompting Asia-Pacific and Middle East countries to strengthen local production of medicines where possible.

Market Segmentation:

Segmentation 1: by Offerings

Consumables

Equipment

Services

The Asia-Pacific and Middle East NGS market (by offerings) is expected to be dominated by the consumables segment.

Segmentation 2: by Platform

Illumina, Inc.

Thermo Fisher Scientific Inc.

Pacific BioSciences of California, Inc.

Oxford Nanopore Technologies plc.

Other Companies

The Asia-Pacific and Middle East NGS market (by platform) is expected to be dominated by Illumina, Inc.

Segmentation 3: by Throughput

High-Throughput

Medium-Throughput

Low-Throughput

The Asia-Pacific and Middle East NGS market (by throughput) is expected to be dominated by the high-throughput segment.

Segmentation 4: by Technology Type

Sequencing by Synthesis

Ion Torrent Semiconductor Sequencing

Single Molecule Real-Time Sequencing

Nanopore Sequencing Technology

Other Technologies

The Asia-Pacific NGS market (by technology type) is expected to be dominated by the sequencing by synthesis segment.

Segmentation 5: by Application

Clinical Diagnostics

Translational Research

Other Applications

The Asia-Pacific NGS market (by technology type) is expected to be dominated by the translational research segment.

Segmentation 6: by End User

Academic and Research Institutes

Clinical Laboratories

Pharmaceutical and Biotechnology Companies

Other End Users

The Asia-Pacific NGS market (by end user) is expected to be dominated by the academic and research institutes segment.

Segmentation 7: by Country

Asia-Pacific

Japan

India

South Korea

Australia

Singapore

New Zealand

Rest-of-Asia-Pacific

Middle East

U.A.E.

K.S.A.

Egypt

Israel

Rest-of-Middle East

The Asia-Pacific NGS market (by country) is expected to be dominated by Japan and the Middle East NGS market (by country) is expected to be dominated by the U.A.E.

*Note: Each country is further segmented by offering, equipment (units), platform.

Recent Developments in the Asia-Pacific and Middle East NGS Market

In October 2022, the company introduced Revio and Onso - new sequencing systems; Revio is a long-read sequencing system that allows the sequencing of up to 1,300 human whole genomes per year, while Onso is a benchtop short-read DNA sequencing platform. The system enables scaling of the use of PacBio's HiFi sequencing technology for large studies in human genetics, cancer research, and agricultural genomics, among others.

In September 2022, Illumina, Inc. introduced Illumina Complete Long-Reads (INFINITY) for human whole-genome sequencing (WGS). This resulted in a high-performance, streamlined, integrated method. Furthermore, the platform showed compatible with all NovaSeq systems for the synthesis of thousands of long-read genomes every year.

In September 2022, Illumina, Inc. introduced the first FDA-registered and CE-marked in vitro diagnostic (IVD) high-throughput sequencer, the NovaSeq 6000 Dx. The NovaSeq 6000 Dx is a versatile platform that provides the greatest levels of compliance while also delivering useful insights for patient care.

In August 2022, Illumina, Inc. teamed with Minderoo Foundation and contributed \$27.8 million to improve genetic knowledge of marine systems. This innovative

collaboration used Illumina's NextSeq 2000 sequencing system to assess and understand marine life in seas.

In April 2022, the company expanded its relationship with Genomics England, which is evaluating the therapeutic and scientific uses of full genomic analysis of cancer tumors using nanopore technology in an ongoing project.

In March 2022, the company introduced CE-IVD marked Ion Torrent Genexus Dx Integrated Sequencer. This sequencer is fully automated, producing data in a single day.

In January 2022, Pacific Biosciences of California, Inc. collaborated with Genomics England, a company created to deliver the 100,000 Genomes Project to study PacBio's technology for the identification of genetic variants in cancer and rare disease cases. As part of the collaboration, Genomics England will re-sequence biobank samples collected during the 100,000 Genomes Project using Pacific Biosciences of California, Inc.'s long-read sequencing technology to identify additional genomic variants that are not readily accessible by short-read sequencing technologies.

Demand - Drivers and Limitations

The following are the drivers for the Asia-Pacific and Middle East NGS market:

Increasing Adoption of NGS in Various Research and Diagnostics Fields

Growing Prevalence of Non-Communicable Diseases

Advancement in the Performance of NGS Platforms

The market is expected to face some limitations as well due to the following challenges:

Dearth of Skilled Professionals in Middle East Countries

High Cost of Installation and Maintenance of the Equipment

Reimbursement and Regulatory Policies of NGS

How can this report add value to an organization?

Type: The Asia-Pacific and Middle East NGS market has been extensively segmented on the basis of various categories such as offerings, throughput, and platform, among others. This can help readers get a clear overview of which segments account for the largest share and which ones are well-positioned to grow in the coming years.

Growth/Marketing Strategy: Synergistic activities and product launches/approvals accounted for the maximum number of key developments, i.e., over 70% of the total developments in the global Asia-Pacific and Middle East NGS market.

Competitive Strategy: The Asia-Pacific and Middle East NGS market is highly consolidated, with around six key players accounting for a vast majority of the market share. Key players in the Asia-Pacific and Middle East NGS market analyzed and profiled in the study involve established and players that offer various kinds of NGS platforms, consumables, and services.

Key Market Players and Competition Synopsis

The Asia-Pacific and Middle East NGS market is highly consolidated, with around six key players accounting for a vast majority of the market share.

Key Companies Profiled

BGI Group

Illumina, Inc.

Thermo Fisher Scientific Inc.

Pacific Biosciences of California, Inc.

Oxford Nanopore Technologies plc.

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