

Next Generation Sequencing (NGS) Market - A Global and Regional Analysis: Focus on Offering, Company, Throughput, Technology Type, Sequencing, Application, End User, and Country Analysis - Analysis and Forecast, 2023-2033

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Abstracts

Global NGS Market: Industry Overview

The global NGS market was valued at \$6.76 billion in 2022 and is expected to reach \$28.47 billion by 2033, growing at a CAGR of 13.97% during the forecast period 2023-2033. The market is driven by factors such as the increasing adoption of NGS in various research and diagnostics fields, the growing prevalence of non-communicable disorders, and the advancement in the performance of NGS platforms.

Market Lifecycle Stage

The global 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 global NGS market lies in the development of economical and portable technologies.

Impact of COVID-19

NGS has played a crucial role in the genomic surveillance of SARS-CoV-2, the virus responsible for COVID-19. Sequencing the viral genome has helped in tracking the spread of different variants and understanding their genetic characteristics, which has been essential for public health efforts, vaccine development, and treatment strategies. NGS has been employed in studies investigating the genetic susceptibility to COVID-19.

and its severity. By sequencing the genomes of affected individuals, researchers have sought to identify genetic variations associated with the risk of infection, disease progression, and response to treatment.

However, while NGS testing shot up in the research laboratories studying the transmission of the SARS-CoV-2 virus, NGS testing in the clinical setting witnessed a significant drop. The global supply chain for NGS instruments, consumables, and reagents experienced severe disruptions due to the pandemic. Manufacturing and shipping delays impacted the availability of NGS products and tests, especially in developing regions such as the Middle East, Africa, or Rest-of-the-World.

Market Segmentation:

Segmentation 1: by Offering

Consumables

Library Preparation Kits

Sequencing Kits

Equipment

Services

The global NGS market (by offering) is expected to be dominated by the consumables segment.

Segmentation 2: by Company

Illumina, Inc.

Thermo Fisher Scientific Inc.

Pacific BioSciences of California, Inc.

Oxford Nanopore Technologies plc.

Other Companies

The global NGS market (by company) is expected to be dominated by Illumina, Inc.

Segmentation 3: by Throughput

High- and Ultra-High-Throughput

Medium-Throughput

Low-Throughput

The global NGS market (by throughput) is expected to be dominated by the high- and ultra-high throughput segment.

Segmentation 4: by Technology Type

Sequencing by Synthesis

In Torrent Semiconductor Sequencing

Single Molecule Real-Time Sequencing

Nanopore Sequencing Technology

Other Technologies

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

Segmentation 5: by Sequencing

Whole Genome Sequencing

Whole Exome Sequencing

Targeted Sequencing

The global NGS market (by sequencing) is expected to be dominated by the targeted sequencing segment.

Segmentation 6: by Application

Clinical Diagnostics

Oncology

Non-Oncology

Research

Oncology

Non-Oncology

The global NGS market (by application) is expected to be dominated by the research segment. Within further sub-segmentation, the market is expected to be dominated by the oncology segment.

Segmentation 7: by End User

Academic and Research Institutes

Clinical Laboratories

Pharmaceutical and Biotechnology Companies

Other End Users

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

Segmentation 8: by Country

North America - U.S., Canada

Europe - Germany, U.K., France, Italy, Spain, and Rest-of-Europe

Asia-Pacific - Japan, India, China, South Korea, Australia, Singapore, New Zealand, and Rest-of-Asia-Pacific

Middle East - U.A.E., K.S.A., Israel, Rest-of-Middle East

Rest-of-the-World - Latin America, Rest-of-Rest-of-the-World

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

Recent Developments in the Global NGS Market

In April 2023, NGeneBio signed a business agreement with Agilent Technologies, Inc.'s Korea-based subsidiary, to expand the NGS precision diagnosis in South Korea and abroad.

In March 2023, Sophia Genetics partnered with Agilent Technologies Inc. to integrate its Sophia DDM Platform with Agilent Technologies Inc.'s research-use-only SureSelect Cancer Comprehensive Genomic Profiling (CGP) assay kit.

In March 2023, Thermo Fisher Scientific Inc. collaborated with Pfizer to expand access to NGS-based lung and breast cancer testing in more than 30 countries.

In January 2023, Qiagen N.V. completed the acquisition of Verogen, Inc. in order to deploy next-generation biometrics for forensic and molecular testing.

In October 2022, Pacific Biosciences of California, Inc. introduced two new sequencing systems, namely, Revio and Onso.

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.

Demand - Drivers and Limitations

The following are the drivers for the global NGS market:

Decreasing Cost of Genome Sequencing

Potential of NGS in the Field of Oncology Research and as a Companion Diagnostic for Oncology in Clinical Settings

Growing Number of Population-Wide Sequencing Studies and Government Initiatives to Integrate NGS in Healthcare

Advantages of NGS Technology Over Other Technologies

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

Concerns Surrounding Privacy of Patient Genomic Data

Lack of Complete Reimbursement Coverage for NGS Testing

How can this report add value to an organization?

Type: The global 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., nearly 85% of the total developments in the global NGS market.

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

Key Companies Profiled

BGI Group

Illumina, Inc.

Thermo Fisher Scientific Inc.

Pacific Biosciences of California, Inc.

Oxford Nanopore Technologies plc.

Agilent Technologies, Inc.

Qiagen N.V.

Pillar Biosciences

Burning Rock Biotech Limited

Singular Genomics Systems, Inc.

DANAHER CORPORATION

F. Hoffmann-La Roche Ltd

Twist Bioscience Corporation

Revvity, Inc.

Centogene N.V.

Element Biosciences

Ultima Genomics

Genes2me

LifeStrands Genomics Pte. Ltd.

Alitheia Genomics

Real Seq Biosciences

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