

NGS Data Storage Market - A Global and Regional Analysis: Focus on Offerings, Read Length, Sourcing Type, Application, End User, and Country Analysis - Analysis and Forecast, 2023-2033

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Abstracts

NGS Data Storage Market Industry Overview

The global NGS data storage market is projected to reach \$6.96 billion by 2033 from \$1.13 billion in 2022, growing at a CAGR of 18.02% during the forecast period 2023-2033. The growth in the NGS data storage market is expected to be driven by the rising adoption of next-generation sequencing (NGS) tool in research laboratories that generates a huge amount of data that is stored and analyzed for actionable insights. Several companies have developed NGS informatics solutions to aid healthcare institutions and academic research centers.

Market Lifecycle Stage

NGS data is critical to researchers that offer storage solutions that are reliable while being easy to manage. Sequencing companies are adopting cloud-based storage solutions that offer several advantages, including accessibility, scalability, and cost-effectiveness. Cloud-based storage services are provided by various big IT vendors, such as Amazon Web Services, Google Cloud, and Microsoft Azure. These services offer pay-as-you-go models, which make it easier for researchers to manage costs based on their data storage needs.

Impact

NGS can be used to sequence the human genome and performed extensively in

research laboratories during the COVID-19 pandemic. The technology generates an enormous amount of raw data that needs substantial amounts of computational processing to yield desired results. NGS also played a crucial role in advancing the research focused on tracing the origin of COVID-19. NGS bioinformatic pipeline was in practice during the pandemic that is defined as a series of data algorithms that are run to generate interpretable data. The technological methods of NGS are in high adoption in commercial laboratory processes and use inevitable variations in the software and computational tools. All NGS bioinformatics pipelines share several major features, including variant annotation sequence generation, variant identification, assembly and alignment, and variant visualization.

Impact of COVID-19

The SARS-CoV-2 virus changed multiple times during the pandemic through mutations and has a constantly evolving nature. Continuous monitoring of the viruses' genomes is vital for the various diagnostic assays in different locations. Several non-commercial protocols and commercial kits were made available for amplicon SARS-CoV-2 preparation, some of which were adapted by NGS platforms. Leading market players in the NGS data storage market that offer NGS data analysis solutions are undertaking strategic partnerships and collaborations to refine their product portfolios and maintain a strong global NGS data storage market.

There was the adoption of a bioinformatics platform by research laboratories during the pandemic, and the virus is still being sequenced even during the post-pandemic era. For example, in early 2023, the latest variant of XBB.1.5, which is a subvariant of Omicron, has become the most transmissible strain of the COVID-19 virus so far. Thus, the need to keep sequencing this virus is constant. The pandemic has also spurred genome sequencing committees around the world, which are sequencing infectious diseases like never before. An enormous amount of NGS data is being produced, which requires effective data analysis and data storage. The petabyte (PB) and zettabyte (ZB) are required to process and analyze data in the life sciences and pharmaceutical industry. The demand for data storage is anticipated to increase more in the future with the rapid usage of cloud-based solutions offered by companies to understand the mechanism of coronavirus to prevent future outbreaks.

Market Segmentation:

Segmentation 1: by Read Length

Short-read Length

Long-read Length

Among the read length of the global NGS data storage market, the short-read length segment dominated in the year 2022. This is due to the rising adoption of short-read sequencing in research laboratories owing to its advantages, such as it is widely being used in diagnostic applications. The human genome is broken into small fragments, i.e., 50 to 300 bases, before it is sequenced. Short-read sequencing is cost-effective, accurate, and supported by a different range of data analysis pipelines and tools.

Segmentation 2: by Sourcing Type

In-house NGS Data Storage

Outsourced NGS Data Storage

Among the sourcing type of the global NGS data storage market, the in-house NGS data storage segment dominated in the year 2022, owing to increasing usage. In-house NGS data storage includes data analysis that involves those companies which are into the diagnosis of diseases. Such companies are carrying out NGS and their own data analysis using available software tools or servers or using available hardware and software resources. Companies operating in this segment have been increasing in the past few years.

Segmentation 3: by Offering

Data Storage Solutions

Data Analysis Services

Other Offerings

Among the offerings type of the global NGS data storage market, data analysis services segment dominated in the year 2022. Bioinformaticians carry out data analysis services and the services can be customized depending on the customer's requirements. Key

aspects such as specific objectives, the approximate number of hours required for the project, and defined deliverables is estimated during the initial consultation by the bioinformaticians. Each data analysis service starts by consultation with an experienced NGS bioinformatics specialist in order to understand the customers requirements. Data analysis services deal with carrying out data analysis using software. For instance, Thermo Fisher Scientific, Inc. offers data analysis services using Torrent Suite Software. The company also offers a range of activities related to Ion AmpliSeq RNA or RNA-Seq data analysis and bioinformaticians guide their customer for these services.

Segmentation 4: by Application

Oncology

Infectious Diseases

Rare Diseases

Reproductive Health

Central Nervous System (CNS)

Other Applications

Among the applications of the global NGS data storage market, the oncology segment dominated in the year 2022. NGS technologies are efficient and accurate in detecting novel and rare somatic mutations. A variety of different types of cancers include bladder cancer, chronic lymphocytic, renal cell carcinoma, renal cell carcinoma, prostate cancer, small-cell lung cancer, and acute myelogenous. Cancer treatment is moving more toward targeted and personalized treatment. The five-year survival rate has improved significantly for many cancer types because of targeted therapies and immunotherapies.

Segmentation 5: by Region

North America

Europe

Asia-Pacific

Latin America

Middle East

Rest-of-the-World

Among the region of the global NGS data storage market, North America dominated in the year 2022. The North America NGS data storage market is foreseen to be majorly driven by the presence of cloud-based and on-premise software solutions offered by NGS data storage companies to process, and store, large genomic and NGS datasets in the cloud with built-in scalability, thereby enhancing the overall scope of the market. The U.S. dominated the North America region because of substantial investments by the U.S. government for the co-development of targeted therapeutics and molecular diagnostics, the presence of major market players in the country, and significant healthcare expenditure in the region.

Recent Developments in the Global NGS Data Storage Market

In March 2023, Illumina, Inc. launched its first product based on its long-read technology. The technology has high-performance, long-read sequencing technology that offers an application for whole-genome sequencing (WGS) assay, i.e., Illumina Complete Long Read Prep, Human, which is compatible with Illumina NovaSeq X Plus, NovaSeq X, and NovaSeq 6000 Sequencing Systems.

In March 2023, Illumina, Inc. launched 'Connected Insights Software,' a new cloud-based software that helps in the tertiary analysis of clinical data. The software is being used by researchers for tertiary analysis for oncology applications and for rare diseases in the future.

In February 2023, Twist Bioscience gained early access to the Twist enhanced Whole Genome Sequencing (eWGS) solution targeted on non-human genomics applications at the Advances in Genome Biology and Technology (AGBT) 2023 General Meeting in Hollywood, Florida. eWGS is a novel solution that helps researchers to enable low-pass whole genome data together of selected regions in a cost-effective and high throughput workflow.

In January 2023, QIAGEN N.V. introduced the QIAGEN Digital Insights (QDI), the bioinformatics business of QIAGEN, and enhanced QIAGEN CLC Genomics Workbench Premium for a \$1.0 computing cost for 25 minutes. The product helps to remove the data-analysis bottleneck of NGS by adding game-changing analysis speed to analyze and interpret whole exome sequencing (WES), whole genome sequencing (WGS), and large panel sequencing data.

In October 2022, BGI Australia's lab received the National Association of Testing Authorities (NATA) to perform clinical Whole Exome Sequencing (WES) in Australia. The company paved the way for the global life sciences company to provide clinical sequencing services.

Demand – Drivers and Limitations

The following are the demand drivers for Global NGS Data Storage Market:

Declining cost of cloud-based data storage solutions

Increasing demand for sequencing at higher depth

Growing number of population genomics studies and initiatives globally

Rising adoption of cloud-based data storage solutions

The market is expected to face some limitations, too, due to the following challenges:

Genomic data privacy and security concerns

Increasing volume of data storage and its complexity

How can this report add value to an organization?

Innovation Strategy: Companies in the global NGS data storage market are involved in continuous innovation and strategy related to offering data analysis and data compression software solutions and services. For instance, In October 2021, VAST Data, Inc. introduced VASTOS version 4, its universal storage operating system, which

has the capability to provide a range of enterprise security and management features designed to harden and simplify data management.

Growth/Marketing Strategy: Companies involved in the global NGS data storage market have received approval and certification from regulatory authorities. For instance, in October 2022, BGI Australia's lab received the National Association of Testing Authorities (NATA) to perform clinical Whole Exome Sequencing (WES) in Australia. The company paved the way for the global life sciences company to provide clinical sequencing services. The MGI DNBSEQ-G400 platform that performs clinical WES and the procedures implemented by the technicians of MGI have qualified for NATA accreditation. NATA's certification for a laboratory is provided for storage and the process for data deletion, and these are a critical part of NATA's certification.

Competitive Strategy: Key players in the global NGS data storage market are analyzed and profiled in the study to provide data storage solutions and services to their end users. Moreover, a detailed competitive benchmarking of the players operating in the global NGS data storage market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analyzing company coverage, product portfolio, and market penetration. The leading top segment players include NGS data storage solutions and service providers. Also, other segments such as read length, sourcing type, workflow, application, and end-user in the market have been considered as part of the scope of the study.

Among the read length segment, the short-read length segment dominated in the year 2022 with a market share of 68.37%

Key Companies Profiled

Agilent Technologies, Inc.

BGI Group

DNAexus, Inc.

Fabric Genomics, Inc.

F. Hoffmann-La Roche Ltd. (Roche Molecular Systems, Inc.)

Illumina, Inc.

PerkinElmer Inc.

PacBio.

QIAGEN N.V.

Qumulo, Inc.

Thermo Fisher Scientific Inc.

Contents

1 MARKETS

1.1 Inclusion and Exclusion Criteria

1.2 Market Scope

1.2.1 Scope of the Study

1.2.2 Key Questions Answered in the Report

1.3 Research Methodology

1.3.1 Global NGS Data Storage Market: Research Methodology

1.3.2 Data Sources

1.3.2.1 Primary Data Sources

1.3.2.2 Secondary Data Sources

1.3.3 Market Estimation Model

1.3.4 Criteria for Company Profiling

2 MARKET OVERVIEW

2.1 Overview

2.1.1 Market Definition

2.1.2 Current Market Scenario

2.1.2.1 Parameters of Cloud Data Security

2.1.2.2 Benefits of Cloud-based Data Storage

2.1.3 Market Footprint and Growth Potential

2.1.4 COVID-19 Impact on NGS Data Storage Market

2.1.4.1 Impact on Research and Clinical Operations

2.1.4.2 COVID-19 Impact: Current Scenario of the Market

2.1.4.3 Pre-and Post-COVID-19 Market Assessment

3 INDUSTRY ANALYSIS

3.1 Legal Requirements

3.1.1 Legal Requirements and Framework in the U.S.

3.1.1.1 U.S. FDA Published Guidance

3.1.1.2 U.S. FDA Regulations

3.1.2 Legal Requirements and Framework in Europe

3.1.2.1 European Medicine Agency (EMA)

3.1.2.2 Various Guidelines Related to NGS in Europe

3.1.3 Legal Requirements and Framework in Asia-Pacific

- 3.1.3.1 China
 - 3.1.3.2 Japan
 - 3.1.3.2.1 Pharmaceuticals and Medical Devices Agency (PMDA)
 - 3.1.3.2.2 Ministry of Health, Labor, and Welfare (MHLW)
 - 3.1.3.3 India
- 3.2 Regulatory Compliance

4 MARKET DYNAMICS

- 4.1 Overview
- 4.2 Impact Analysis
- 4.3 Market Drivers
 - 4.3.1 Declining Cost of Cloud-based Data Storage Solutions
 - 4.3.2 Increasing Demand for Sequencing at Higher Depth
 - 4.3.3 Growing Number of Population Genomic Studies and Initiatives Globally
 - 4.3.4 Rising Adoption of Cloud-based Data Storage Solutions
- 4.4 Market Challenges
 - 4.4.1 Genomic Data Privacy and Security Concerns
 - 4.4.2 Increasing Volume of NGS Data Generated and its Complexity
- 4.5 Market Opportunities
 - 4.5.1 Data Compression Efforts by Companies
 - 4.5.2 Advancements in Big Data Technology Enabling Efficient Data Storage

5 COMPETITIVE LANDSCAPE

- 5.1 Overview
- 5.2 Corporate Strategies
 - 5.2.1 Mergers and Acquisitions
 - 5.2.2 Synergistic Activities
- 5.3 Business Strategies
 - 5.3.1 Product Launches/Upgradations
 - 5.3.2 Business Expansion, Funding, and Others
- 5.4 Market Share Analysis (by Company)
- 5.5 Growth Share Analysis
 - 5.5.1 Growth Share Analysis (by Read Length)
 - 5.5.2 Growth Share Analysis (by Sourcing Type)

6 GLOBAL NGS DATA STORAGE MARKET (BY OFFERINGS), (\$BILLION), 2022-2033

- 6.1 Overview
- 6.2 Data Storage Solutions
 - 6.2.1 Cloud-based Data Storage Solutions
 - 6.2.2 On-Premises Data Storage Solutions
- 6.3 Data Analysis Services
- 6.4 Other Offerings

7 GLOBAL NGS DATA STORAGE MARKET (BY READ LENGTH), (\$BILLION), 2022-2033

- 7.1 Overview
- 7.2 Long-read Length
- 7.3 Short-read Length

8 GLOBAL NGS DATA STORAGE MARKET (BY SOURCING TYPE), \$BILLION, 2022-2033

- 8.1 Overview
- 8.2 In-house NGS Data Storage
- 8.3 Outsourced NGS Data Storage

9 GLOBAL NGS DATA STORAGE MARKETS (BY APPLICATION), \$MILLION, 2022-2033

- 9.1 Overview
- 9.2 Oncology
- 9.3 Rare Diseases
- 9.4 Reproductive Health
- 9.5 Infectious Diseases
- 9.6 Central Nervous System (CNS)
- 9.7 Other Applications

10 GLOBAL NGS DATA STORAGE MARKET (BY END USER), (\$MILLION), 2022-2033

- 10.1 Overview
- 10.2 Academic and Research Institutions
- 10.3 Pharmaceutical and Biotechnology Companies

10.4 Molecular Diagnostic Laboratories

10.5 Other End Users

11 GLOBAL NGS DATA STORAGE MARKET, BY REGION, \$MILLION, 2022-2033

11.1 Overview

11.2 North America

11.2.1 U.S.

11.2.2 Canada

11.3 Europe

11.3.1 Germany

11.3.2 France

11.3.3 U.K.

11.3.4 Italy

11.3.5 Spain

11.3.6 Netherlands

11.3.7 Rest-of-Europe

11.4 Asia-Pacific

11.4.1 China

11.4.2 Japan

11.4.3 India

11.4.4 Australia

11.4.5 South Korea

11.4.6 Rest-of-Asia-Pacific

11.5 Latin America

11.5.1 Brazil

11.5.2 Mexico

11.5.3 Rest-of-Latin America

11.6 Middle East

11.6.1 U.A.E.

11.6.2 KSA

11.6.3 Egypt

11.6.4 Israel

11.6.5 Rest-of-Middle East

11.7 Rest-of-the-World

12 COMPANY PROFILES

12.1 Overview

12.2 Agilent Technologies, Inc.

12.2.1 Company Overview

12.2.2 Role of Agilent Technologies, Inc. in the Global NGS Data Storage Market

12.2.3 Financials

12.2.4 Recent Developments

12.2.5 Target Customers

12.2.6 Analyst Perspective

12.3 BGI Group

12.3.1 Company Overview

12.3.2 Role of BGI Group in the Global NGS Data Storage Market

12.3.3 Recent Developments

12.3.4 Target Customers

12.3.5 Analyst Perspective

12.4 DNAnexus, Inc.

12.4.1 Company Overview

12.4.2 Role of DNAnexus, Inc. in the Global NGS Data Storage Market

12.4.3 Recent Developments

12.4.4 Target Customers

12.4.5 Analyst Perspective

12.5 Fabric Genomics, Inc.

12.5.1 Company Overview

12.5.2 Role of Fabric Genomics, Inc. in the Global NGS Data Storage Market

12.5.3 Recent Developments

12.5.4 Target Customers

12.5.5 Analyst Perspective

12.6 F. Hoffmann-La Roche Ltd. (Roche Molecular Systems, Inc.)

12.6.1 Company Overview

12.6.2 Role of F. Hoffmann-La Roche Ltd. in the Global NGS Data Storage Market

12.6.3 Financials

12.6.4 Recent Developments

12.6.5 Target Customers

12.6.6 Analyst Perspective

12.7 Illumina, Inc.

12.7.1 Company Overview

12.7.2 Role of Illumina, Inc. in the Global NGS Data Storage Market

12.7.3 Financials

12.7.4 Recent Developments

12.7.5 Target Customers

12.7.6 Analyst Perspective

12.8 PerkinElmer Inc.

12.8.1 Company Overview

12.8.2 Role of PerkinElmer Inc. in the Global NGS Data Storage Market

12.8.3 Financials

12.8.4 Recent Developments

12.8.5 Target Customers

12.8.6 Analyst Perspective

12.9 PacBio.

12.9.1 Company Overview

12.9.2 Role of PacBio. in the Global NGS Data Storage Market

12.9.3 Financials

12.9.4 Recent Developments

12.9.5 Target Customers

12.9.6 Analyst Perspective

12.1 QIAGEN N.V.

12.10.1 Company Overview

12.10.2 Role of QIAGEN N.V. in the Global NGS Data Storage Market

12.10.3 Financials

12.10.4 Recent Developments

12.10.5 Target Customers

12.10.6 Analyst Perspective

12.11 Qumulo, Inc.

12.11.1 Company Overview

12.11.2 Role of Qumulo, Inc. in the Global NGS Data Storage Market

12.11.3 Recent Developments

12.11.4 Target Customers

12.11.5 Analyst's Perspective

12.12 Thermo Fisher Scientific Inc.

12.12.1 Company Overview

12.12.2 Role of Thermo Fisher Scientific Inc. in the Global NGS Data Storage Market

12.12.3 Financials

12.12.4 Target Customers

12.12.5 Analyst Perspective

12.13 Emerging Companies

12.13.1 Singular Genomics Systems, Inc.

12.13.2 Element Biosciences

List Of Figures

LIST OF FIGURES

- Figure 1: Global NGS Data Storage Market, \$Billion, 2022 and 2033
- Figure 2: Global NGS Data Storage Market Segmentation
- Figure 3: Global NGS Data Storage Market (by Offerings), Share (%), 2022 and 2033
- Figure 4: Global NGS Data Storage Market (by Read Length), Share (%), 2022 and 2033
- Figure 5: Global NGS Data Storage Market (by Sourcing Type), Share (%), 2022 and 2033
- Figure 6: Global NGS Data Storage Market (by Application), Share (%), 2022 and 2033
- Figure 7: Global NGS Data Storage Market (by End User), Share (%), 2022 and 2033
- Figure 8: Global NGS Data Storage Market (by Region), Share (%), 2022
- Figure 9: Global NGS Data Storage Market: Research Methodology
- Figure 10: Primary Research Methodology
- Figure 11: Bottom-Up Approach (Segment-Wise Analysis)
- Figure 12: Top-Down Approach (Segment-Wise Analysis)
- Figure 13: Parameters of Cloud Data Security
- Figure 14: Impact of COVID-19 on the Global NGS Data Storage Market
- Figure 15: Global NGS Data Storage Market: COVID-19 Impact
- Figure 16: The U.S. FDA's Regulatory Insight System
- Figure 17: Global NGS Data Storage Market Dynamics
- Figure 18: Cloud Storage Cost Over Time, 2007-2019
- Figure 19: Genomic Initiatives Based on Region, 2020
- Figure 20: Share of Key Developments, January 2019-March 2023
- Figure 21: Share of Mergers and Acquisitions (by Company), January 2019-March 2023
- Figure 22: Share of Product Launches (by Company), January 2019-March 2023
- Figure 23: Share of Business Expansion and Funding Activities (by Company), January 2019-March 2023
- Figure 24: Market Share Analysis of Global NGS Data Storage Market (by Company), 2022
- Figure 25: Growth Share Analysis for Global NGS Data Storage Market (by Read Length), 2022
- Figure 26: Growth Share Analysis for Global NGS Data Storage Market (by Sourcing Type), 2022
- Figure 27: Global NGS Data Storage Market (by Offerings)
- Figure 28: Global NGS Data Storage Market (by Offerings), \$Billion, 2022 and 2033
- Figure 29: Global NGS Data Storage Market (Data Storage Solutions), \$Billion,

2022-2033

Figure 30: Data Analysis Services

Figure 31: Global NGS Data Storage Market (Data Analysis Services), \$Billion, 2022-2033

Figure 32: Global NGS Data Storage Market (Other Offerings), \$Billion, 2022-2033

Figure 33: Global NGS Data Storage Market (by Read Length)

Figure 34: Global NGS Data Storage Market (by Read Length), Share (%), 2022 and 2033

Figure 35: CLR and HiFi Long Reads of PacBio

Figure 36: Global NGS Data Storage Market (Long-read Length), \$Billion, 2022-2033

Figure 37: Basic Workflow of Short-read Sequencing

Figure 38: Global NGS Data Storage Market (Short-read Length), \$Billion, 2022-2033

Figure 39: Global NGS Data Storage Market (by Sourcing Type)

Figure 40: Global NGS Data Storage Market (by Sourcing Type), Share (%), 2022 and 2033

Figure 41: Global NGS Data Storage Market (In-house NGS Data Storage), \$Billion, 2022-2033

Figure 42: Advantages of Outsourced NGS Data Storage

Figure 43: Global NGS Data Storage Market (Outsourced NGS Data Storage), \$Billion, 2022-2033

Figure 44: Global NGS Data Storage Market (by Application)

Figure 45: Global NGS Data Storage Market (by Application), Share (%), 2022 and 2033

Figure 46: Global NGS Data Storage Market (Oncology), \$Million, 2022-2033

Figure 47: Global NGS Data Storage Market (Rare Diseases), \$Million, 2022-2033

Figure 48: Global NGS Data Storage Market (Reproductive Health), \$Million, 2022-2033

Figure 49: Global NGS Data Storage Market (Infectious Diseases), \$Million, 2022-2033

Figure 50: Global NGS Data Storage Market (CNS), \$Million, 2022-2033

Figure 51: Global NGS Data Storage Market (Other Applications), \$Million, 2022-2033

Figure 52: Global NGS Data Storage Market (by End User)

Figure 53: Global NGS Data Storage Market (by End User), Share (%), 2022 and 2033

Figure 54: Global NGS Data Storage Market (Academic and Research Institutes), \$Million, 2022-2033

Figure 55: Global NGS Data Storage Market (Pharmaceutical and Biotechnology Companies), \$Million, 2022-2033

Figure 56: Global NGS Data Storage Market (Molecular Diagnostic Laboratories), \$Million, 2022-2033

Figure 57: Global NGS Data Storage Market (Other End Users), \$Million, 2022-2033

Figure 58: Global NGS Data Storage Market (by Region), Share (%), 2022

- Figure 59: Global NGS Data Storage Market (by Region), \$Million, 2022-2033
- Figure 60: North America NGS Data Storage Market, \$Million, 2022-2033
- Figure 61: North America: Market Dynamics
- Figure 62: North America NGS Data Storage Market (by Country), \$Million, 2022-2033
- Figure 63: U.S. NGS Data Storage Market, \$Million, 2022-2033
- Figure 64: Canada NGS Data Storage Market, \$Million, 2022-2033
- Figure 65: Europe NGS Data Storage Market, \$Million, 2022-2033
- Figure 66: Europe: Market Dynamics
- Figure 67: Europe NGS Data Storage Market (by Country), \$Million, 2022-2033
- Figure 68: Germany NGS Data Storage Market, \$Million, 2022-2033
- Figure 69: France NGS Data Storage Market, \$Million, 2022-2033
- Figure 70: U.K. NGS Data Storage Market, \$Million, 2022-2033
- Figure 71: Italy NGS Data Storage Market, \$Million, 2022-2033
- Figure 72: Spain NGS Data Storage Market, \$Million, 2022-2033
- Figure 73: Netherlands NGS Data Storage Market, \$Million, 2022-2033
- Figure 74: Rest-of-Europe NGS Data Storage Market, \$Million, 2022-2033
- Figure 75: Asia-Pacific NGS Data Storage Market, \$Million, 2022-2033
- Figure 76: Asia-Pacific: Market Dynamics
- Figure 77: Asia-Pacific NGS Data Storage Market (by Country), \$Million, 2022-2033
- Figure 78: China NGS Data Storage Market, \$Million, 2022-2033
- Figure 79: Japan NGS Data Storage Market, \$Million, 2022-2033
- Figure 80: India NGS Data Storage Market, \$Million, 2022-2033
- Figure 81: Australia NGS Data Storage Market, \$Million, 2022-2033
- Figure 82: South Korea NGS Data Storage Market, \$Million, 2022-2033
- Figure 83: Rest-of-Asia-Pacific NGS Data Storage Market, \$Million, 2022-2033
- Figure 84: Latin America NGS Data Storage Market, \$Million, 2022-2033
- Figure 85: Latin America: Market Dynamics
- Figure 86: Latin America NGS Data Storage Market (by Country), \$Million, 2022-2033
- Figure 87: Brazil NGS Data Storage Market, \$Million, 2022-2033
- Figure 88: Mexico NGS Data Storage Market, \$Million, 2022-2033
- Figure 89: Rest-of-Latin America NGS Data Storage Market, \$Million, 2022-2033
- Figure 90: Middle East NGS Data Storage Market, \$Million, 2022-2033
- Figure 91: Middle East: Market Dynamics
- Figure 92: Middle East NGS Data Storage Market (by Country), \$Million, 2022 and 2033
- Figure 93: U.A.E. NGS Data Storage Market, \$Million, 2022-2033
- Figure 94: KSA NGS Data Storage Market, \$Million, 2022-2033
- Figure 95: Egypt NGS Data Storage Market, \$Million, 2022-2033
- Figure 96: Israel NGS Data Storage Market, \$Million, 2022-2033
- Figure 97: Rest-of-Middle East NGS Data Storage Market, \$Million, 2022-2033

- Figure 98: Rest-of-the-World NGS Data Storage Market, \$Million, 2022-2033
- Figure 99: Total Number of Companies Profiled
- Figure 100: Agilent Technologies, Inc.: Product Portfolio
- Figure 101: Agilent Technologies, Inc.: Overall Financials, \$Million, 2020-2022
- Figure 102: Agilent Technologies, Inc.: Net Revenue (by Segment), \$Million, 2020-2022
- Figure 103: Agilent Technologies, Inc.: Net Revenue (by Region), \$Million, 2020-2022
- Figure 104: Agilent Technologies, Inc.: R&D Expenditure, \$Million, 2020-2022
- Figure 105: BGI Group: Product Portfolio
- Figure 106: DNAnexus: Product Portfolio
- Figure 107: Fabric Genomics, Inc.: Product Portfolio
- Figure 108: F. Hoffmann-La Roche Ltd.: Product Portfolio
- Figure 109: F. Hoffmann-La Roche Ltd.: Overall Financials, \$Million, 2020-2022
- Figure 110: F. Hoffmann-La Roche Ltd.: Revenue (by Segment), \$Million, 2020-2022
- Figure 111: F. Hoffmann-La Roche Ltd.: Revenue (by Region), \$Million, 2020-2022
- Figure 112: F. Hoffmann-La Roche Ltd.: R&D Expenditure, \$Million, 2020-2022
- Figure 113: Illumina, Inc.: Product Portfolio
- Figure 114: Illumina, Inc.: Overall Financials, \$Million, 2020-2022
- Figure 115: Illumina, Inc.: Revenue (by Segment), \$Million, 2020-2022
- Figure 116: Illumina, Inc.: Revenue (by Region), \$Million, 2020-2022
- Figure 117: Illumina, Inc.: R&D Expenditure, \$Million, 2020-2022
- Figure 118: PerkinElmer Inc.: Product Portfolio
- Figure 119: PerkinElmer Inc.: Overall Financials, \$Million, 2020-2022
- Figure 120: PerkinElmer Inc.: Revenue (by Segment), \$Million, 2020-2022
- Figure 121: PerkinElmer Inc.: Revenue (by Region), \$Million, 2020-2022
- Figure 122: PerkinElmer Inc.: R&D Expenditure, \$Million, 2020-2022
- Figure 123: PacBio.: Product Portfolio
- Figure 124: PacBio.: Overall Financials, \$Million, 2020-2022
- Figure 125: PacBio.: Revenue (by Segment), \$Million, 2020-2022
- Figure 126: PacBio.: Revenue (by Region), \$Million, 2020-2022
- Figure 127: PacBio.: R&D Expenditure, \$Million, 2020-2022
- Figure 128: QIAGEN N.V.: Product Portfolio
- Figure 129: QIAGEN N.V.: Overall Financials, \$Million, 2020-2022
- Figure 130: QIAGEN N.V.: Revenue (by Segment), \$Million, 2020-2022
- Figure 131: QIAGEN N.V.: Revenue (by Region), \$Million, 2020-2022
- Figure 132: QIAGEN N.V.: R&D Expenditure, \$Million, 2020-2022
- Figure 133: Qumulo, Inc.: Product Portfolio
- Figure 134: Thermo Fisher Scientific Inc.: Product Portfolio
- Figure 135: Thermo Fisher Scientific Inc.: Overall Financials, \$Million, 2020-2022
- Figure 136: Thermo Fisher Scientific Inc.: Revenue (by Segment), \$Million, 2020-2022

Figure 137: Thermo Fisher Scientific Inc.: Revenue (by Region), \$Million, 2020-2022

Figure 138: Thermo Fisher Scientific Inc. Expenditure, \$Million, 2020-2022

List Of Tables

LIST OF TABLES

Table 1: Likert Scale

Table 2: Impact Analysis of Market Drivers, Restraints, and Opportunities on the Global NGS Data Storage Market

Table 3: Overview of NGS Data Storage Requirements Based on Number of Reads, Coverage, and Read Length

Table 4: Total NGS Data Storage Requirements

Table 5: Emerging Companies in NGS Data Storage Market and Their Contribution

Table 6: Guidelines Related to NGS in Europe

Table 7: Regulatory Compliance Related to NGS

Table 8: Likert Scale

Table 9: Impact Analysis of Market Drivers

Table 10: Impact Analysis of Market Restraints

Table 11: Impact Analysis of Market Opportunities

Table 12: Comparison between Types of Next-Generation Sequencing Techniques

Table 13: Large Genomic Initiatives and Genome Projects

Table 14: Different Types of Cloud-based Services for NGS Data Storage and Computation

Table 15: Cloud Computing Services and Platforms

Table 16: Data Generated Based on Applications Per Sample

Table 17: Companies Offering Cloud-based Data Storage Solutions

Table 18: Companies Offering On-Premises Data Storage Solutions

Table 19: Companies Offering Bioinformatics Consulting and Other Services

Table 20: Data Type, Length, Accuracy, and Cost Across Long-read and Short-read Technologies and Platforms

Table 21: Companies Providing In-house NGS Data Storage

Table 22: U.S. Regulatory Compliance for Data Security

Table 23: Canada Regulatory Compliance for Data Security

Table 24: Germany Regulatory Compliance for Data Security

Table 25: France Regulatory Compliance for Data Security

Table 26: U.K. Regulatory Compliance for Data Security

Table 27: Italy Regulatory Compliance for Data Security

Table 28: Netherlands Regulatory Compliance for Data Security

Table 29: China Regulatory Compliance for Data Security

Table 30: Japan Regulatory Compliance for Data Security

Table 31: India Regulatory Compliance for Data Security

Table 32: Australia Regulatory Compliance for Data Security

Table 33: South Korea Regulatory Compliance for Data Security

Table 34: Regulatory Compliance for Data Security

Table 35: Regulatory Compliance for Data Security

Table 36: U.A.E. Regulatory Compliance for Data Security

Table 37: KSA Regulatory Compliance for Data Security

Table 38: Egypt Regulatory Compliance for Data Security

Table 39: Israel Regulatory Compliance for Data Security

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