

Targeted Sequencing Market - A Global and Regional Analysis: Focus on Application, Product Type, Target Enrichment Methods, Type of Target Capture, End User, and Region - Analysis and Forecast, 2024-2033

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Abstracts

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Global Targeted Sequencing Market Overview

In 2023, the targeted sequencing market held a value of \$3,479.8 million. The market is expected to grow at a CAGR of 12.28% during the forecast period 2024-2033 and attain a value of \$10,987.4 million by 2033. The global targeted sequencing market is primarily driven by increasing research initiatives, rising demand for precision medicine, and geographical expansion of key players.

Market Lifecycle Stage

The global targeted sequencing market has been characterized by intense competition, as established entities and emerging players compete for a share of the market. The anticipated growth and transformation of the market bring forth both challenges and opportunities, which are expected to make it a dynamic landscape to observe in the upcoming years.

Industry Impact

Targeted sequencing is expected to be a period of wider adoption in clinical settings across various applications. For instance, use in early disease detection, personalized treatment selection, and monitoring treatment response. Additionally, continuous price

reduction and higher throughput are driving the widespread adoption at the patient level. Increasing focus on automation in targeted sequencing workflows, single-cell sequencing, advancements in bioinformatics, liquid handling, and nucleic acid preparation are expected to continue to transform targeted sequencing methods. The industry is likely to witness the dynamic contributions of genomics and precision diagnostics.

The industry's advancements in targeted sequencing research and development continually address population health trends, disease prevalence, and treatment outcomes. As a result, the targeted sequencing market's impact extends beyond technological integration for diagnosis, making it an integral component of global health strategies and broader ecosystem.

Market Segmentation:

Segmentation 1: by Application

Cancer

Reproductive Health

Hereditary Diseases

Neurological Disorders

Infectious Diseases

Cardiovascular Diseases

Rare Diseases

Other Applications

Cancer to Dominate the Global Targeted Sequencing Market (by Application)

The cancer segment dominated the global targeted sequencing market (by application) in FY2023.

Targeted sequencing panels are rapidly becoming the standard of care in the management of patients with advanced cancer. NGS-based gene panel tests have successfully identified driver mutations in colorectal cancer, breast cancer, and lung cancers, which has subsequently resulted in the development and use of targeted therapies associated with improved outcomes.

Segmentation 2: by End User

Diagnostic and Clinical Laboratories

Academic and Research Institutions

Pharmaceutical and Biotech Companies

Other End Users

Academic and Research Institutions to Dominate the Global Targeted Sequencing Market (by End User)

The academic and research institutions segment dominated the global targeted sequencing market (by end user) in FY2023.

Growing research initiatives undertaken by universities and research institutes in exploring new applications for targeted sequencing are driving the academic and research institutions segment growth.

Segmentation 3: by Product Type

Instruments

Services

Kits/Panels and Assays

Others

Services to Dominate the Global Targeted Sequencing Market (by Product Type)

The global targeted sequencing market (by product type) was dominated by the services segment in FY2023. This is largely due to the value proposition offered by targeted sequencing services. These services present an economically viable, efficient, and expertise-centric approach for laboratories and researchers.

Segmentation 4: by Target Enrichment Method

Hybridization Capture

Amplicon Sequencing

Other Target Enrichment Methods

Hybridization Capture to Dominate the Global Targeted Sequencing Market (by Target Enrichment Method)

The global targeted sequencing market (by target enrichment method) was dominated by the hybridization capture segment in FY2023. The hybridization capture-based method is more suitable for research and discovery projects. Therefore, scientists and clinicians tend to employ hybridization capture for large panels for the detection of SNPs, fusion genes, copy number variations (CNV), and others.

Segmentation 5: by Target Capture

Targeted DNA Sequencing

Targeted RNA Sequencing

Other Types of Target Capture

Targeted DNA Sequencing to Dominate the Global Targeted Sequencing Market (by Target Capture)

The global targeted sequencing market (by target capture) was dominated by the targeted DNA sequencing segment in FY2023. Targeted DNA sequencing allows researchers to focus time and expense on the data analysis of only the regions of

interest.

Segmentation 6: by Region

North America

Europe

Asia-Pacific

Latin America

Middle East and Africa

The targeted sequencing market in the North America region has been witnessing significant growth of 12.39% in the forecast period, marked by increasing research and development in the region and early adoption of advanced technologies. In 2023, North America accounted for a share of 49.90% of the global targeted sequencing market.

Demand - Drivers, Restraints, and Opportunities

Market Drivers:

Increasing Demand for High Depth of Coverage in Sequencing: Increasing depth of coverage is a pivotal driving factor in the targeted sequencing market, as it directly influences the accuracy and reliability of genomic analyses.

Market Restraints:

Lack of Advanced Genomic Testing Centers: There is difficulty in establishing and maintaining different sequencing technology platforms, including their supportive genomic data analysis software tools, which also require maintenance in terms of upgrades.

Market Opportunities:

Increasing Opportunities in Early Diagnosis: With the rise in advancements in NGS, early diagnosis and gene editing have been more feasible with techniques such as

targeted sequencing.

How can this report add value to an organization?

Workflow/Innovation Strategy: The targeted sequencing market (by application) has been segmented into detailed segments of the application of targeted sequencing based on applications, including cancer, reproductive health, hereditary diseases, neurological disorders, infectious diseases, cardiovascular diseases, rare diseases, and other applications.

Growth/Marketing Strategy: Constant advancement and innovation to enhance performance and efficiency can enable prominent players to command premium prices while maintaining growth in revenue and volume.

Competitive Strategy: Key players in the global targeted sequencing market have been analyzed and profiled in the study, including manufacturers involved in new product launches, acquisitions, expansions, and strategic collaborations. Moreover, a detailed competitive benchmarking of the players operating in the global targeted sequencing 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 are expected to aid the reader in understanding the untapped revenue pockets in the market.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The base year considered for the calculation of the market size is 2023. The historical year analysis has been done from FY2020 to FY2022, and the market size has been calculated for FY2023 and projected for the period 2024-2033.

The geographical distribution of the market revenue is estimated to be the same as the company's net revenue distribution. All the numbers have been adjusted to two digits after decimals for report presentation reasons. However, the real figures have been utilized for compound annual growth rate (CAGR) estimation. CAGR has been calculated from 2024 to 2033.

The market has been mapped based on different types of products available in the market and several indications. All the key manufacturing companies that

have a significant number of offerings to the targeted sequencing market have been considered and profiled in the report.

In the study, the primary respondents' verification was considered to finalize the estimated market for the targeted sequencing market.

The latest annual reports of each market player have been taken into consideration for market revenue calculation.

Market strategies and developments of key players have been considered for the calculation of sub-segment split.

The base currency considered for the market analysis is US\$. Currencies other than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year. The currency conversion rate has been taken from the historical exchange rate of the Oanda website or from the annual reports of the respective company, if stated.

Primary Research

The key data points taken from the primary sources include:

Validation and triangulation of all the numbers and graphs

Validation of the report's segmentation and key qualitative findings

Understanding of the numbers of the various markets for market type

Percentage split of individual markets for regional analysis

Secondary Research

Open Sources

Food and Drug Administration (FDA), PubMed, and National Center for Biotechnology Information (NCBI)

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and detailed study of their portfolio

Gold standard magazines, journals, whitepapers, press releases, and news articles

Databases

The key data points taken from the secondary sources include:

Segmentations, split-ups, and percentage shares

Data for market value

Key industry trends of the top players in the market

Qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

Quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The global targeted sequencing industry is in a growth phase and constantly evolving. Illumina, Inc. holds a significant market share in terms of technology and consumables and is expected to retain its dominance. The market dominance can be attributed to its huge product portfolio and highly accurate sequencing instruments. Other established players in the market include PerkinElmer, Inc., Beijing Genomics Institute (BGI), Thermo Fisher Scientific, Inc., and Agilent Technologies, Inc.

Some of the prominent companies in this market are:

Agilent Technologies, Inc.

Azenta, Inc.

BGI Group

CD Genomics

F. Hoffmann-La Roche Ltd

Daicel Corporation

Thermo Fisher Scientific, Inc.

Danaher Corporation

Illumina, Inc.

LGC Limited

PacBio

Revvity, Inc.

Psomagen

QIAGEN N.V.

Takara Bio Inc.

Companies that are not a part of the aforementioned pool have been well-represented across different sections of the report (wherever applicable).

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