

Global Next-generation Sequencing Services Market Size Study & Forecast, by Type (Human Genome Sequencing, Single Cell Sequencing, Microbial Genome-based Sequencing, Other Sequencing Services), by Workflow (Pre-sequencing, Sequencing, Data Analysis), by End-use (Universities & Other Research Entities, Hospitals & Clinics, Others), and Regional Analysis, 2023-2030

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Abstracts

Global Next-generation Sequencing Services Market is valued at approximately USD 4.80 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 22.68% over the forecast period 2023-2030. Next-Generation Sequencing (NGS) Services encompass a diverse set of genomic sequencing solutions offered by specialized service providers. NGS is an influential technology facilitating swift and cost-effective analysis of DNA, RNA, and other biological molecules on a large scale recognized as high-throughput sequencing. These services provide a range of sequencing applications, including whole-genome sequencing, exome sequencing, RNA sequencing, targeted sequencing, and various others. The utilization of Next-Generation Sequencing (NGS) technology is on the rise for both conventional and non-conventional applications, allowing for swift and comprehensive genomic insights. This trend is predominantly driven by ongoing enhancements in automation, ancillary protocols, services, and analytical solutions within the NGS field. Consequently, these advancements have created favorable conditions for the integration of NGS into clinical workflows, contributing to the growth prospects for market expansion. Additionally, the declining price of sequencing, the high cost of sequencing infrastructure, coupled with the rising need for skilled professionals for efficient NGS sample preparation and

analysis are the key factors contributing to the market demand globally.

Moreover, the increasing prevalence of genetic disorders worldwide highlights the significance of advanced genomic analysis, which is augmenting the market growth. Accordingly, the rise in incidences of a range of genetic disorders such as sickle cell disease, cystic fibrosis, Alpha-1 Antitrypsin (AAT) deficiency, hemophilia, and more are primarily attributed to the market demand. For instance, cystic fibrosis, a progressive genetic condition, impacts multiple organs, including the lungs and pancreas. The American Lung Association reported that in November 2022, approximately 30,000 individuals in the United States and 70,000 people worldwide were affected by this disease. Also, approximately 1 in 30 Americans is a carry a gene mutation associated with cystic fibrosis. This condition transcends racial and ethnic boundaries, affecting individuals from diverse backgrounds. In individuals with cystic fibrosis, mutations within the Cystic Fibrosis Transmembrane Conductance Regulator (CFTR) gene result in dysfunctional CFTR protein. When this protein fails to function properly, it cannot facilitate the movement of chloride—a component of salt—to the cell surface. Consequently, the absence of chloride to attract water to the cell surface leads to the thickening and stickiness of mucus in various organs. NGS services offer a powerful tool for identifying and understanding genetic variations associated with various disorders, driving demand in diagnostic applications. Thus, these aforementioned factors are propelling the growth of the Next-generation Sequencing Services Market over the estimated period. Moreover, the rising emphasis on the analysis of complex sequencing data, as well as increasing applications in cancer and agrigenomics research present various lucrative opportunities over the forecast years. However, the installation of in-house sequencing facilities in hospitals and universities and the accuracy & standardization concerns in diagnostic testing are challenging the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Next-generation Sequencing Services Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rise in the number of genomics research projects, robust informatics network, well-defined regulatory guidelines governing the approval and utilization of genetic tests, and the prominence of market leaders. Furthermore, the increasing count of FDA-approved genomic tests in the United States is expected to propel the regional market's growth consistently over the forecast period. Whereas, Europe is expected to grow at the highest CAGR over the forecast years. The ongoing economic development and rapid development of healthcare infrastructure are significantly propelling the market demand across the region. Additionally, the increasing focus of government bodies on public health

maintenance, coupled with investments in the advancement of innovative diagnostic approaches is expected to drive the adoption of sequencing services across different regions.

Major market players included in this report are:

Quest Diagnostics Incorporated

ARUP Laboratories

Applied Biological Materials, Inc. (abm)

Novogene Co, Ltd.

Azenta Life Sciences (GENEWIZ)

NanoString Technologies, Inc.

Illumina, Inc.

PacBio

Veritas Technologies LLC.

BGI (Beijing Genomics Institute)

Recent Developments in the Market:

In November 2021, Novogene announced its plans to introduce dedicated single cell sequencing services tailored for its Japanese clientele during the 44th Annual Gathering of the Molecular Biological Society of Japan (MSBJ). Novogene Japan K.K. offer on-site services to support clients in optimizing their single-cell sequencing plans through this new service.

In November 2021, Illumina and Genetic Alliance unveiled the iHope Genetic Program, aiming to extend access to Whole-Genome Sequencing (WGS) for thousands of individuals grappling with genetic illnesses worldwide. The majority of iHope Genetic Health's programs focus on underdeveloped areas of the world outside of the United States, with more than one-third of Illumina's funding going

toward treating patients in Africa. This improves the volume and efficiency of sequencing in current operations and expedites their start-up.

Global Next-generation Sequencing Services Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Type, Workflow, End-use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Type:

Human Genome Sequencing

Single Cell Sequencing

Microbial Genome-based Sequencing

Gene Regulation Services

Animal & Plant Sequencing

Other Sequencing Services

By Workflow:

Pre-sequencing

Sequencing

Data Analysis

By End-use:

Universities & Other Research Entities

Hospitals & Clinics

Pharma & Biotech Entities

Others

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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