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Global Oncology NGS Market: Analysis By Technology, By Workflow, By Application, By End User, By Region Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Oncology NGS (Next-Generation Sequencing) refers to the use of advanced sequencing technologies in cancer research, diagnosis, and treatment. NGS allows for the rapid and accurate analysis of genetic material (DNA or RNA), enabling a comprehensive understanding of the genetic mutations and alterations that drive cancer development and progression. The global oncology NGS market value in 2023 stood at US$510.76 million, and is projected to reach US$1166.70 million by 2029.

The global oncology NGS market is poised for significant growth, driven by several key factors. The increasing prevalence of cancer worldwide has heightened the demand for precise and personalized diagnostic and treatment solutions, which NGS enables through comprehensive tumor profiling and identification of actionable genetic mutations. Growing adoption of precision medicine and companion diagnostics, coupled with rising awareness among healthcare providers and patients, has further fueled market growth. Additionally, substantial investments in genomic research, government initiatives to promote cancer genomics, and the expansion of applications such as liquid biopsy and hereditary cancer screening have contributed to the market's robust expansion. Advancements in sequencing technologies, have also significantly reduced costs and improved the speed and accuracy of genetic analysis. The global oncology NGS market value is projected to grow at a CAGR of 14.76%, during the forecast period of 2024-2029.

Market Segmentation Analysis:

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By Technology: According to the report, the global oncology NGS market is bifurcated into three segments based on the technology: targeted sequencing & resequencing, whole exome sequencing and whole genome sequencing. Targeted sequencing & resequencing segment acquired majority of share in the market in 2023 due to its cost-effectiveness, faster processing times, and ability to focus on specific cancer-related genes, making it ideal for clinical applications such as diagnostics and personalized treatment. Its widespread adoption in research and healthcare settings further solidified its dominance. While, whole genome sequencing segment is experiencing rapid growth in the global oncology NGS market due to its capability to provide a comprehensive view of the entire genetic landscape, enabling the discovery of novel mutations and biomarkers. Additionally, its utility in studying rare or undiagnosed cancers and enabling breakthroughs in personalized medicine has accelerated its adoption.

By Workflow: According to the report, the global oncology NGS market is bifurcated into three types of workflows: NGS sequencing, NGS Pre-sequencing and NGS data analysis. NGS sequencing segment acquired majority of share in the market in 2023 due to its central role in the overall workflow, as it encompasses the actual sequencing process, which is critical for generating high-quality genomic data. The increasing adoption of advanced sequencing platforms, coupled with rising demand for accurate and efficient cancer diagnostics and treatment monitoring, further boosted its market share. While, the NGS pre-sequencing segment is experiencing rapid growth in the global oncology NGS market due to the increasing need for high-quality sample preparation. Advances in library preparation, target enrichment techniques, and automation tools have streamlined the pre-sequencing process, improved efficiency and reducing errors. Additionally, the rising complexity of oncology samples, such as liquid biopsies and heterogeneous tumors, has heightened the demand for robust pre-sequencing solutions, driving its rapid adoption in both research and clinical settings.

By Application: According to the report, the global oncology NGS market is bifurcated into three applications: screening, companion diagnostics and other diagnostics. Screening segment acquired majority of share in the market in 2023 due to the growing emphasis on early cancer detection. NGS-based screening allows for the identification of genetic mutations and biomarkers that can indicate the presence of cancer at earlier stages, enabling more effective and personalized treatment options. Whereas, companion diagnostics segment has been experiencing rapid growth in the global oncology NGS market due to its critical role in personalized medicine. The growing focus on precision oncology and the increasing approval of targeted therapies by regulatory bodies have significantly fueled the demand for companion diagnostics in

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cancer care.

By End User: According to the report, the global oncology NGS market is bifurcated into two end users: laboratories, hospitals and clinics. Laboratories acquired majority of share in the market in 2023 due to their essential role in conducting high-throughput sequencing and genomic testing for cancer research and diagnostics. Laboratories are equipped with advanced sequencing platforms and specialized expertise to handle large volumes of samples, offering critical insights into genetic mutations and cancer progression. Whereas, clinics segment has been experiencing rapid growth in the global oncology NGS market due to the growing trend of integrating genomic testing into routine clinical practice, along with improved patient awareness and the need for precision medicine. With advancements in NGS technology, clinics are now able to offer more efficient and accurate genetic testing, enabling early cancer detection, targeted therapies, and continuous monitoring of treatment efficacy.

By Region: The report provides insight into the oncology NGS market based on the geographical operations, namely, North America, Europe, Asia Pacific, and rest of the world. The North America oncology NGS market enjoyed the highest market share in 2023 due to the region's strong healthcare infrastructure, advanced research capabilities, and high adoption of precision medicine. The presence of leading biotechnology and pharmaceutical companies, along with significant investments in cancer genomics and diagnostics, has accelerated the use of NGS technologies in cancer treatment and research. Additionally, the growing emphasis on early cancer detection, personalized therapies, and the increasing support from government initiatives further contributed to the dominance of North America in the oncology NGS market. While, Asia Pacific region has been experiencing fastest growth in the global oncology NGS market due to increasing healthcare investments, a rising prevalence of cancer, and the expanding adoption of advanced diagnostic technologies. Rapid advancements in genomics research, along with improving healthcare infrastructure and access to NGS platforms, have driven demand for personalized cancer treatments. Additionally, growing awareness about cancer prevention and early detection, along with government initiatives to support precision medicine, are fueling the expansion of the oncology NGS market in the region. India is expected to register the fastest growth in the Asia Pacific's oncology NGS market due to the increasing burden of cancer and the rising demand for advanced diagnostic technologies. With growing investments in healthcare infrastructure, rapid adoption of precision medicine, and government initiatives to improve cancer care, India is becoming a key player in the genomics field.

Global Oncology NGS Market Dynamics:

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Growth Drivers: One of the most important factors driving the growth of global oncology NGS market is rising incidences of cancer. As the global cancer burden continues to increase, early and accurate detection of genetic mutations and biomarkers becomes crucial for improving patient outcomes. NGS technologies, with their ability to provide comprehensive genomic data, enable more precise diagnoses and targeted therapies, which are essential for managing cancer more effectively. This growing demand for personalized medicine, along with the need for innovative solutions to address the rising cancer cases, has significantly accelerated the adoption of NGS in oncology, driving market growth. Other factors driving the growth of global oncology NGS market include growing healthcare expenditure, government initiatives, cost reduction etc.

Challenges: One significant challenge faced by the global oncology NGS market is the complex data analysis required to interpret the vast amounts of genomic information generated by sequencing technologies. NGS produces high-dimensional data that necessitates advanced bioinformatics tools, specialized algorithms, and expert knowledge to accurately identify relevant mutations, biomarkers, and therapeutic targets. The complexity of analyzing and integrating this data into clinical practice can lead to delays, increased costs, and the need for skilled personnel, all of which present obstacles to the widespread adoption and effective use of NGS in oncology. Another challenge might include high cost associated, etc.

Trends: Liquid biopsy innovations are a significant market trend in the global oncology NGS market, driven by the growing demand for non-invasive cancer diagnostics and monitoring. Liquid biopsies involve analyzing blood samples to detect circulating tumor DNA (ctDNA), circulating tumor cells (CTCs), or other cancer-related biomarkers, offering a less invasive alternative to traditional tissue biopsies. This innovation enables early cancer detection, monitoring of treatment response, and detection of minimal residual disease or relapse, all without the need for complex surgical procedures. The increasing adoption of liquid biopsy technologies in clinical practice, coupled with advances in NGS platforms to analyze these samples, is propelling the growth of the oncology NGS market by offering more accessible, cost-effective, and real-time cancer diagnostics. The market is also projected to grow at a fast pace during the forecast period, due to various other latest trends such as integration with AI and Bioinformatics, increased focus on personalized medicine, rise of companion diagnostics, advancements in sequencing technologies, increased R&D investments, decentralization of NGS testing etc.

Impact Analysis of COVID-19 and Way Forward:

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The COVID-19 pandemic had a significant impact on the global oncology NGS market, initially causing disruptions in cancer diagnostics and treatment due to the reallocation of healthcare resources to pandemic management and the delay of non-urgent medical procedures. Cancer screening and elective surgeries were postponed, leading to a backlog in diagnoses and treatment initiation. However, the pandemic also accelerated the adoption of telemedicine and non-invasive diagnostic tools, including liquid biopsies, which gained traction as alternatives to traditional methods. As healthcare systems recover, there is a renewed focus on addressing the backlog in cancer care and increasing investments in oncology genomics to support personalized medicine. The way forward includes leveraging digital health solutions, improving access to genomics-based testing, and fostering collaborations between healthcare providers and biotech companies to enhance early detection, treatment efficacy, and monitoring in oncology, ensuring a more resilient and efficient healthcare system.

Competitive Landscape and Recent Developments:

The global oncology NGS market is fragmented, characterized by the presence of numerous players, including established global companies, regional firms, and emerging startups. This fragmentation stems from the diverse nature of NGS applications, ranging from diagnostics to drug discovery, as well as the rapid technological advancements in sequencing technologies, bioinformatics, and data analysis tools. Key players of global oncology NGS market are:

Thermo Fisher Scientific Inc.
Agilent Technologies, Inc.
Qiagen
Illumina, Inc.
Roche Holdings AG
Revvity Inc.
Pacific Biosciences of California Inc.
Myriad Genetics Inc.
Oxford Nanopore Technologies
BGI Group (Beijing Genomics)
Caris Life Sciences

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, In January 2023, Qiagen N.V. completed

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the acquisition of Verogen, Inc. in order to deploy next-generation biometrics for forensic and molecular testing and 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.

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