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Global Whole Exome Sequencing Market 2023

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Abstracts

Description

The Whole Exome Sequencing Market is poised for substantial growth, with a projected increase from USD 1.43 billion in 2022 to USD 3.75 billion by 2029. This growth is expected to be driven by a compound annual growth rate (CAGR) of 14.2% during the forecast period of 2023-2029. Exome sequencing is a technique that selectively targets the subset of DNA responsible for encoding proteins, offering a cost-effective screening method for diagnosing genetic disorders. It has gained prominence in the field of drug discovery and development as an alternative to whole-genome sequencing, providing valuable insights into the genetic basis of diseases.

The market growth is driven by expanding applications in clinical diagnosis, particularly in the identification of rare diseases, where whole exome sequencing has proven to be a valuable tool. Additionally, ongoing research and development in genomics and next-generation sequencing technologies contribute to the market expansion. The demand for personalized medicine, which relies on precise genetic profiling, also fuels the adoption of whole exome sequencing.

Market Segmentation

The market is segmented based on product, application, end user, and geography.

Segmentation by Product

System

Kits

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Services

Segmentation by Application

Second-Generation Sequencing %li%Sequencing, by Synthesis (SBS), Sequencing, by Hybridization and Ligation (SBL)

Third-Generation Sequencing

Segmentation by End User

Diagnostics

Drug Discovery and Development

Personalized Medicine

Others

Segmentation by Geography

North America %li%United States, Canada, Mexico

Europe %li%United Kingdom, Germany, France, Italy, Spain, and Rest of Europe

Asia-Pacific %li%China, Japan, India, Australia, South Korea, and Rest of Asia-Pacific

Latin America %li%Brazil, Argentina, and Rest of Latin America

Middle East and Africa %li%GCC, South Africa, and Rest of Middle East and Africa

Personalized medicine, also known as precision medicine, aims to provide customized therapies based on individual genetic makeup. This approach has gained popularity due to advancements in genetics and understanding of gene influence on health and drug response. Tailoring treatments to patients leads to safer and more effective methods for various conditions. The personalized medicine segment is driven by factors including increasing cancer prevalence, affordability of therapy, fewer side effects, high adoption in developed markets, and development of innovative drugs. Strategic activities like partnerships, mergers, acquisitions, and product launches by market players are

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expected to further drive growth.

The North American region dominates the whole exome sequencing market due to factors such as increasing prevalence of genetic and chronic disorders, aging population, demand for personalized medicine, and favorable government initiatives. The burden of infectious diseases, including HIV, further fuels the demand for diagnosis and contributes to market growth. Mergers, acquisitions, launches, and partnerships among key players also drive growth in North America. With the growing prevalence of infectious diseases and introduction of new products, the North American market is expected to experience significant growth in the forecast period.

Competitive Landscape

The whole exome sequencing market is moderately consolidated, with a limited number of global and regional companies. Key players in the market include Bio-Rad Laboratories Inc., Eurofins Scientific SE, F. Hoffmann-La Roche AG, Illumina Inc., and Thermo Fisher Scientific Inc. Other notable players include Azenta Inc., BGI Genomics Co. Ltd., CD Genomics, Geneyx Genomex Ltd, Konica Minolta Inc. (Ambry Genetics Corporation), PerkinElmer Inc., Psomagen Inc (Macrogen Corp.), QIAGEN N.V., and others. These companies have significant market shares and established reputations.

Recent Industry Developments

In February 2023, Illumina Inc. delivered its first NovaSeqX Plus system to the Broad Institute, providing support for accessing Illumina's sequencing service, including human whole genome and blended genome/exome products.

In May 2022, the Qatar Genome Program (QGP), a division of the Qatar Foundation (QF), partnered with Thermo Fisher Scientific to advance genomic research and enhance the clinical applications of predictive genomics in Qatar. This partnership aims to extend the benefits of precision medicine to Arab populations.

Why Buy This Report?

Get a detailed picture of the Global Whole Exome Sequencing Market

Identify segments/areas to invest in over the forecast period in the Global Whole Exome Sequencing Market

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Understand the competitive environment, the market’s leading players

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