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Next Generation Sequencing Market Analysis By Application (HLA Testing, Prenatal Testing, Oncology, Idiopathic & Infectious Diseases), By Technology (Whole Genome Sequencing, Whole Exon Sequencing, Targeted Sequencing & Resequencing), By Workflow (NGS Pre-Sequencing, NGS Sequencing, NGS Data Analysis) And Segment Forecasts To 2022

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Abstracts

The global market for next generation sequencing is expected to reach USD 27.87 billion by 2022. Technological developments in the field of genomic sequencing is expected to cause a decline in the cost of sequencing per base pair and thereby, greatly enhance adoption and usage rates of next generation sequencing over the forecast period. With this expected increase in usage of whole genome sequencing, a consequent increase in revenue from HLA and prenatal testing segments is also expected, owing to the introduction of more informative novel phase resolved single cycle reads. Growing incidences of cancer and infectious diseases are further expected to fuel the growth of the next generation sequencing market over the forecast period.

Further key findings from the study suggest:

Targeted sequencing & resequencing was the leading technology segment of the market in 2014, majorly owing to rapidly growing demand in oncology and infectious diseases related research. Sequencing of targeted genes allows researchers to gain insights into the functioning of cancer cells and pathogenic life cycles. Growing incidences of life threatening forms of cancer and infectious diseases is a high impact rendering factor expected to contribute to the growth of this segment over the forecast period.

The next generation sequencing based oncology market is expected to lead the market in terms of revenue throughout the forecast period. However, the use of NGS in fields of HLA and prenatal testing are expected to grow at a relatively higher rate through to 2022, owing to the introduction of techniques which can enable researchers to acquire phase-resolved HLA and prenatal sequences in single cycle reads. In addition, recent developments are expected to solve sequencing ambiguity issues and provide greater insights about genetic functioning.

Next generation sequencing was the largest workflow segment of the market in 2014. The introduction of technologically advanced genome sequencing platforms and the growing demand for personalized medicine are two factors likely to drive segment growth over the forecast period.

Next generation sequencing based data analysis is also expected to grow at a considerably high rate during the forecast period. Large amounts of sequencing data generated from extensive R&D initiatives and the subsequent growth in demand for storage and analysis are some factors attributing to the segment's rapid growth.

North America emerged as the leading regional market in 2014. High R&D investment directed towards the development of genome sequencing, presence of sophisticated technology framework, increasing adoption rates of whole genome sequencing and the reduction in cost of sequencing per base pair are some factors accounting for the region's large market share.

Key participants of the next generation sequencing market include GATC Biotech AG., Life Technologies (Thermo Fisher Scientific), 454 Life Sciences Corp. (Roche Holding AG), Pacific Biosciences, Agilent Technologies Inc., Macrogen Inc., Beijing Genomics Institute, Biomatters Ltd., CLC bio (Qiagen), Illumina Inc., DNASTAR Inc., Knome Inc., Qiagen NV., Helicos BioSciences, and Oxford Nanopore Technologies.

For the purpose of this study, Grand View Research has segmented the next generation sequencing market on the basis of technology, workflow, application and region:

Global Next Generation Sequencing Application Outlook (Revenue, USD Billion, 2012 – 2022)

- HLA Testing

Prenatal Testing

Oncology

Idiopathic Diseases

Infectious Diseases

Others

Global Next Generation Sequencing Technology Outlook (Revenue, USD Billion, 2012 – 2022)

Whole Genome Sequencing

Whole Exon Sequencing

Targeted Sequencing & Resequencing

Global Next Generation Sequencing Workflow Outlook (Revenue, USD Billion, 2012 – 2022)

NGS Pre-sequencing

NGS Sequencing

NGS Data Analysis

Next Generation Sequencing Regional Outlook (Revenue, USD Billion, 2012 – 2022)

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