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Japan IVD Sequencing (NGS) Market (By Segment: Sequencing Instruments, Sample Preparation, Sequencing Testing – NIPT, Oncology, Genetics, Infectious Diseases), Company Share Analysis, Market Dynamics and Recent Developments – Forecast to 2030

https://marketpublishers.com/r/JEDED83A2FACEN.html
Date: July 2026
Pages: 0
Price: US$ 2,290.00 (Single User License)
ID: JEDED83A2FACEN

Abstracts

The Japan IVD Sequencing (NGS) market is projected to increase from US$ 37.4 Million in 2025, to over US$ 57.0 Million by 2030, reflecting the country's accelerating adoption of genomic technologies in clinical diagnostics and precision medicine. The expansion is being driven by increasing integration of next-generation sequencing (NGS) into oncology, rare disease diagnosis, inherited disorder testing, and infectious disease surveillance. Japan's strong healthcare infrastructure, growing investment in genomic medicine, and government-backed initiatives such as the national cancer genome profiling programme continue to support the transition of sequencing technologies from research laboratories into routine clinical practice.

Oncology represents the largest application segment within the Japan IVD sequencing market, as healthcare providers increasingly utilize comprehensive genomic profiling (CGP) to identify clinically actionable genetic alterations and optimize targeted treatment strategies. Rising cancer incidence, expanding availability of companion therapeutics, and broader clinical adoption of tumor profiling are driving sequencing demand across major cancer centers. Beyond oncology, NGS is increasingly being used for rare disease diagnosis, inherited disorder screening, reproductive health applications, and infectious disease surveillance, further expanding its clinical relevance.

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Technological advancements are further strengthening market expansion. Improvements in sequencing accuracy, faster turnaround times, automated sample preparation, and declining sequencing costs are making NGS more accessible for clinical laboratories. Moreover, collaborations between diagnostic companies, pharmaceutical manufacturers, and academic research centres are accelerating biomarker discovery and supporting the development of precision diagnostics tailored to the Japanese population.

The competitive landscape is led by global sequencing technology providers alongside domestic diagnostics companies that are expanding their genomic testing capabilities. Major participants such as Roche, Illumina, Thermo Fisher Scientific and Sysmex Corporation continue to maintain strong positions across sequencing instruments, consumables, and bioinformatics solutions, supporting sustained market growth through 2030.

Recent Developments

In August 2025, Illumina Inc. entered into an exclusive distribution agreement with Sysmex Corporation for the distribution and sales of the TruSight Oncology (TSO) Comprehensive Panel System, a cancer genome profiling test for domestic clinical use, in Japan. Under this agreement, Sysmex will be the exclusive distributor of Illumina's TSO Comprehensive Panel System in Japan, handling sales and marketing activities.

In July 2025, Thermo Fisher Scientific announced that the U.S. Food and Drug Administration (FDA) has approved the Oncomine Dx Express Test on the Ion Torrent Genexus Dx Integrated Sequencer as an in vitro diagnostic (IVD) assay for use as a companion diagnostic (CDx) for Dizal’s ZEGFROVY (sunvozertinib) and in tumor profiling. This approval brings rapid next-generation sequencing (NGS) to decentralized clinical settings closer to where patients receive care. With the ability to deliver essential genomic insights in as little as 24 hours, this approval helps advance the accessibility of precision oncology tools and enables more timely decision making.

In May 2025, Illumina, Inc. received approval from the Ministry of Health, Labour and Welfare (MHLW) for TruSight Oncology (TSO) Comprehensive for Class III/IV Medical Device (Specially Controlled Medical Device) in Japan. As genomic insights continue to drive breakthroughs in cancer treatment, the test is designed to make precision oncology more accessible to oncologists and

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patients. This single test includes analysis of DNA and RNA variants and interrogates over 500 genes to profile a patient's solid tumor, helping to increase the likelihood of identifying clinically actionable biomarkers that enable targeted therapy selection or clinical trial enrolment. This CGP test is powered by a streamlined, automated sample-to-report workflow, will enable clinicians in Japan to accelerate access to personalized medicine decisions with greater efficiency and precision.

By Segment: Japan IVD Sequencing (NGS) Market – Key Takeaways

Sequencing testing accounts for the largest share of the Japan IVD Sequencing (NGS) market, primarily driven by its widespread adoption in oncology for comprehensive genomic profiling, biomarker identification, and precision treatment selection. The increasing prevalence of cancer, expanding use of companion diagnostics, and growing reimbursement support for cancer genomic testing continue to reinforce the dominance of this segment. Meanwhile, genetic testing is witnessing steady growth due to rising demand for rare disease diagnosis and inherited disorder screening, while non-invasive prenatal testing (NIPT) is emerging as a high-growth segment, supported by increasing maternal age, growing awareness of prenatal genetic screening, and advancements in cell-free DNA sequencing technologies. Together, these applications are broadening the clinical adoption of NGS across Japan's healthcare system.

Sequencing testing is dominated by Roche and Thermo Fisher Scientific, reflecting their strong presence in Japan's clinical NGS market through comprehensive sequencing solutions, oncology-focused testing portfolios, and established collaborations with hospitals, cancer centres, and reference laboratories.

Sequencing instruments represent another major segment of the Japan IVD Sequencing (NGS) market, supported by continuous investments from hospitals, academic medical centres, and reference laboratories in expanding genomic testing capacity. Demand is being driven by the need for higher-throughput platforms, improved sequencing accuracy, and faster turnaround times to support growing clinical testing volumes, particularly in oncology and inherited disease applications.

Illumina is the leading player in the Japan IVD Sequencing (NGS) instruments

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market, driven by its strong portfolio of high-throughput and benchtop sequencing platforms that are widely adopted by hospitals, academic medical centres, and reference laboratories. The company's leadership is supported by its high sequencing accuracy, scalable workflows, extensive clinical validation, and broad installed base, making it the preferred platform for oncology, rare disease, and genomic medicine applications across Japan.

Sample preparation represents a smaller share of the Japan IVD Sequencing (NGS) market but remains a critical component of the sequencing workflow. Demand is increasing with the rising volume of clinical sequencing tests, as high-quality nucleic acid extraction, library preparation, and target enrichment are essential for generating accurate and reproducible sequencing results. Illumina is the leading player in the Japan IVD Sequencing (NGS) sample preparation market, supported by its comprehensive portfolio of library preparation kits, target enrichment solutions, and integrated workflow products.

iGATE Research report titled “Japan IVD Sequencing (NGS) Market (By Segment: Sequencing Instruments, Sample Preparation, Sequencing Testing – NIPT, Oncology, Genetics, Infectious Diseases), Company Share Analysis, Market Dynamics and Recent Developments – Forecast to 2030” provides a comprehensive assessment of the fast–evolving, high–growth Japan IVD Sequencing (NGS) Market.

This report has been analyzed from 9 viewpoints:

1) Japan IVD Sequencing (NGS) Market and Forecast (2021 – 2030)
2) By Segment - Japan IVD Sequencing (NGS) Market Share and Forecast (2021 – 2030)
3) By Company - Japan IVD Sequencing (NGS) Market Share and Forecast (2021 – 2030)
4) Japan IVD Sequencing (NGS) - Sequencing Instruments Market and Forecast (2021 – 2030)
5) Japan IVD Sequencing (NGS) - Sample Preparation Market and Forecast (2021 – 2030)
6) Japan IVD Sequencing (NGS) - Sequencing Testing Market and Forecast (2021 – 2030)
7) Japan IVD Sequencing (NGS) Market – Key Company Profiles
8) Japan IVD Sequencing (NGS) Market – Recent Developments
9) Japan IVD Sequencing (NGS) Market – Market Dynamics

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By Segment: Japan IVD Sequencing (NGS) Market and Forecast

1. Sequencing Instruments
2. Sample Preparation
3. Sequencing Testing

    NIPT

    Oncology

    Genetics

    Infectious Diseases

Japan IVD Sequencing (NGS) Market – Company Analysis
1. Roche
2. Sysmex
3. Thermo Fisher Scientific
4. Illumina
5. Others

Data Sources

iGATE Research employs rigorous primary and secondary research techniques in developing distinctive data sets and research material for business reports. This report is built by using data and information sourced from Proprietary Information Database, Primary and Secondary Research Methodologies, and In house analysis by iGATE Research dedicated team of qualified professionals with deep industry experience and expertise.

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