

# Immune Repertoire Sequencing - Company Evaluation Report, 2025

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## Abstracts

The Immune Repertoire Sequencing Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Immune Repertoire Sequencing. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and industry trends.

MarketsandMarkets 360 Quadrants evaluated over 102 companies, of which the Top 15 Immune Repertoire Sequencing Companies were categorized and recognized as quadrant leaders.

Immune repertoire sequencing is a powerful application of next-generation sequencing (NGS) used to profile the vast diversity of immune cells in the body. It provides a high-resolution snapshot of an individual's adaptive immune system by sequencing the genes that code for T-cell receptors (TCRs) and B-cell receptors (BCRs). This collection of millions of unique receptors, known as the immune repertoire, holds a detailed record of a person's past and ongoing responses to pathogens, vaccines, and diseases like cancer, offering profound insights into their immunological status.

The market is primarily driven by advancements in immuno-oncology and personalized medicine. Researchers and clinicians use this technology to understand how a patient's immune system is responding to a tumor, to discover novel biomarkers for predicting treatment success, and to develop targeted immunotherapies like CAR-T cells. The technology is also critical in vaccine development for assessing efficacy, in monitoring infectious diseases, and in studying the mechanisms behind autoimmune disorders. The global push towards precision medicine, tailored to an individual's unique genetic and immune profile, is a major catalyst for market growth.

Despite its potential, the field faces significant challenges. The immense complexity of

the generated data requires sophisticated bioinformatics tools and skilled analysts to interpret, creating a potential bottleneck. The high cost associated with NGS equipment and reagents, while decreasing, still limits access for many research institutions. Furthermore, a lack of standardization in experimental protocols and data analysis pipelines across different laboratories can make it difficult to compare results, highlighting a need for greater consensus to ensure the reproducibility and reliability of findings.

The 360 Quadrant maps the Immune Repertoire Sequencing companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Immune Repertoire Sequencing quadrant. The top criteria for product footprint evaluation included Product [Assay Kits & Reagents (TCR Kits [Human TCR Kits, Mouse TCR Kits], BCR Kits [Human BCR Kits, Mouse BCR Kits], Other Assay Kits & Reagents), Instruments & Software], Application [Research Applications, Drug Discovery & Development, Clinical Diagnostics], Product, Technology [Sequencing Technologies (Bulk Sequencing (Multi-cell) Technologies, Single-cell Sequencing Technologies), Library Preparation Technologies, Bioinformatics & Data Analysis Technologies], End User [Academic & Research Institutes, Pharmaceutical & Biotechnology Companies, Other End Users], Service- Workflow [Pre-sequencing Services, Sequencing Services, Data Analysis Services], Service- End User [Pharmaceutical & Biotechnology Companies, Academic & Research Institutes, Other End Users].

#### Key Players:

Major vendors in the Immune Repertoire Sequencing market are Illumina, Inc. (US), Thermo Fisher Scientific Inc. (US), PacBio (US), Oxford Nanopore Technologies PLC (UK), 10X Genomics (US), Agilent Technologies (US), Danaher Corporation (US), Takara Bio Inc. (Japan), Azenta US Inc. (US), Adaptive Biotechnologies (US), BGI Group (China), Personalis, Inc. (US), QIAGEN (Netherlands), Tecan Trading AG (Switzerland), and Creative Biolabs (US). These companies are actively investing in research and development, forming strategic partnerships, and engaging in collaborative initiatives to drive innovation, expand their global footprint, and maintain a competitive edge in this rapidly evolving market.

#### Top three companies:

##### Illumina, Inc. (US)

Illumina is the world's dominant leader in DNA sequencing, and its short-read

technology has been foundational to the genomics revolution. The company provides a comprehensive portfolio of sequencing instruments, from desktop to population-scale platforms, with a business model driven by high-margin, recurring consumable sales. Following its divestiture of GRAIL, Illumina's strategy is intensely focused on its core sequencing business, driving down costs and pushing for broader adoption in clinical diagnostics, especially oncology. By continuously innovating its platforms, Illumina aims to defend its massive market share and power the future of genomic medicine.

#### Thermo Fisher Scientific Inc. (US)

Thermo Fisher Scientific is the world leader in serving science, with an immense portfolio of instruments, consumables, and services. In the genomics space, it competes directly with other leaders through its Ion Torrent semiconductor sequencing platform, which offers advantages in speed and targeted applications. Strategically, Thermo Fisher embeds its genomic solutions within its broader life sciences ecosystem, supporting customers from research to diagnostics and biopharma production. By offering a comprehensive, multi-technology approach, the company maintains its powerful position as an end-to-end partner for the entire scientific community, including researchers in India.

#### PacBio (US)

PacBio is the leading provider of high-fidelity (HiFi) long-read DNA sequencing technology. Unlike short-read methods, its platforms excel at resolving complex genomic regions, providing a complete and more accurate picture of genomes. The company's core strategy is to drive the adoption of its HiFi sequencing from a research niche into mainstream clinical and discovery applications. By continuously increasing the throughput and lowering the cost of its systems, PacBio is making a compelling case for the value of high-quality, long-read data, solidifying its position as a key innovator in the genomics landscape.

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