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Next Generation Sequencing (NGS) Market by Offering (Kits [Library Prep, QC, DNA Extraction], System) Type (Genome, Exome, Targeted) Application (Reproductive, Oncology, Infectious) Technology (SBS, Nanopore, Nanoball, SMRT Seq) – Global Forecast to 2030

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Abstracts

Next Generation Sequencing (NGS) Market by Offering (Kits [Library Prep, QC, DNA Extraction], System) Type (Genome, Exome, Targeted) Application (Reproductive, Oncology, Infectious) Technology (SBS, Nanopore, Nanoball, SMRT Seq) – Global Forecast to 2030

The global NGS market is projected to reach $27.5 billion by 2030, at a CAGR of 15.8% from 2023 to 2030.

Succeeding extensive secondary and primary research and in-depth analysis of the market scenario, the report comprises the analysis of key industry drivers, restraints, challenges, and opportunities. The growth of the NGS market is driven by rising cancer prevalence and increasing application of NGS in cancer treatment and research, the declining costs of genome sequencing, technological advancements in sequencing procedures, increasing pharmaceutical R&D expenditures, the surge in genome mapping programs, and improvements in regulatory and reimbursement scenarios for NGS-based diagnostic tests.

However, the high costs of NGS systems and consumables, the availability of alternative technologies, the low chances of identifying positive, actionable mutations for precision medicine, and ethical and legal issues related to NGS-based diagnosis

restrain the growth of this market. The increasing applications of NGS, the rising adoption of bioinformatics and genomic data management solutions, and government initiatives supporting large-scale genomic sequencing projects are expected to create growth opportunities for the players operating in the NGS market.

However, the lack of skilled professionals and regulatory and standardization concerns in diagnostic testing are major challenges to market growth. The increasing demand for NGS automation, the development of portable sequencing technologies, and increasing partnerships and collaborations among NGS instrument manufacturers to expand and improve product offerings are prominent trends in the next-generation sequencing market.

Based on offering, in 2023, the consumables segment is expected to account for the largest share of the market. The growing adoption of NGS technology in research institutes, pharmaceutical and biotechnology companies, increasing adoption of NGS for genome mapping purposes, increasing the demand for consumables.

Based on sequencing type, targeted genome sequencing is expected to account for the largest share of the market. Targeted genome sequencing offers high throughput sequencing, high reliability, and low cost compared to WGS and WES, which are driving this segment's growth.

Based on technology, the sequencing by synthesis segment is expected to account for the largest share of the market. Less time for sequencing, error-free results, and low cost compared to other technologies are leading to the largest share of the segment. Additionally, the growing incorporation of this technology in NGS products further supports the largest share of this segment.

Based on application, in 2023, the clinical applications segment is expected to register the highest CAGR in the global NGS market. The increase in cancer cases, growing research activities to develop genome-based cancer medicine, and applications of NGS in reproductive health diagnosis contribute to this segment's large market share.

Based on end user, the hospitals and diagnostic laboratories segment is projected to register the highest CAGR during the forecast period. High patient inflows at hospitals and diagnostic laboratories, a wider range of services and treatments, and growing collaborations between hospitals and NGS supplier companies are supporting the growth of this segment.

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An in-depth analysis of the geographical scenario of the global NGS market provides detailed qualitative and quantitative insights about the five major geographies (North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa) along with the coverage of major countries in each region. In 2023, North America is expected to account for the largest share of the NGS market, followed by Europe, Asia-Pacific, Latin America, and the Middle East & Africa. The factors supporting the largest share of this market are technological advancements in the region, the increasing prevalence of cancer, and increased healthcare care spending. Additionally, the presence of key players, well-established healthcare infrastructure, and government initiatives for NGS-based diagnostic testing also contribute to the large market share of North America.

The key players operating in the global NGS market are Illumina, Inc. (U.S.), Thermo Fisher Scientific Inc. (U.S.), F. Hoffmann-La Roche Ltd. (Switzerland), PerkinElmer, Inc. (U.S.), Qiagen N.V. (Netherlands), Agilent Technologies, Inc. (U.S.), Pacific Biosciences of California, Inc. (U.S.), Danaher Corporation (U.S.), Bio-Rad Laboratories, Inc. (U.S.), Oxford Nanopore Technologies Plc. (U.K.), 10X Genomics, Inc. (U.S.), and Beijing Genomics Institute (BGI) (China).

Scope of the Report:

NGS Market Assessment, By Offering

Consumables

Sample Preparation Consumables

DNA Extraction and Amplification

Library Preparation & Target Enrichment

Quality Control

Other Consumables

NGS Platforms/Instruments

Software

Services

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(Other consumables include vials, pipettes, containers, trays, sequencing reagents, flow cells, and tubes)

NGS Market Assessment, by Sequencing Type

Targeted Genome Sequencing

Whole Genome Sequencing

Whole Exome Sequencing

Other Sequencing Types

(Other sequencing types include degradome sequencing, chromatin immunoprecipitation (ChIP) sequencing, and methylation sequencing)

NGS Market Assessment, by Technology

Sequencing by Synthesis

Ion Semiconductor Sequencing

Single-molecule Real-time Sequencing (SMRT)

Nanopore Sequencing

DNA nanoball sequencing

(Other sequencing technologies include polony sequencing, sequencing by ligation, pyrosequencing, and true single molecule sequencing (tSMS))

NGS Market Assessment, by Application

Research Applications

Drug Discovery

Agriculture & Animal Research

Other Research Applications

Clinical Applications

Reproductive Health Diagnosis

Oncology

Infectious Diseases

Other Clinical Applications

(Other research applications include food microbiology, microbiota analysis in the beverage industry, and environmental studies, and other clinical applications include the detection of genetic aberrations in neurological disorders, rare diseases, metabolic and immune disorders, and food-borne illnesses)

NGS Market Assessment, by End User

Hospitals and Diagnostic Laboratories

Pharmaceutical & Biotechnology Companies

Academic Institutes & Research Centers

Other End Users

(Other end users include forensic laboratories & security agencies, food & beverage companies, and agriculture companies)

NGS Market Assessment, by Geography

North America

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- U.S.
- Canada

Europe

- Germany
- U.K.
- France
- Italy
- Spain
- Rest of Europe (RoE)

Asia-Pacific (APAC)

- China
- Japan
- India
- Rest of Asia-Pacific (RoAPAC)

Latin America

- Brazil
- Mexico
- Rest of Latin America (RoLATAM)

Middle East & Africa

Contents

1. OVERVIEW

1.1. Market Definition & Scope
1.2. Market Ecosystem
1.3. Currency And Limitation
1.4. Key Stakeholders

2. RESEARCH METHODOLOGY

2.1. Research Approach
2.2. Process of Data Collection and Validation
  2.2.1. Secondary Research
  2.2.2. Primary Research / Interviews with Key Opinion Leaders of The Industry
2.3. Market Sizing and Forecast
  2.3.1. Market Size Estimation Approach
  2.3.2. Growth Forecast Approach
  2.3.3. Market Share Analysis
2.4. Assumptions For the Study

3. EXECUTIVE SUMMARY

4. MARKET INSIGHTS

4.1. Overview
4.2. Factors Affecting Market Growth
  4.2.1. Impact Analysis of Market Dynamics
  4.2.2. Factor Analysis
4.3. Trends
  4.3.1. Industry Trends
    4.3.1.1. Increasing Partnerships and Collaborations among NGS Instrument Manufacturers to Expand and Improve Product Offerings
  4.3.2. Technology Trends
    4.3.2.1. Development of Portable Sequencing Technologies
    4.3.2.2. Increasing Demand for NGS Automation
4.4. Case Studies
  4.4.1. Clear Labs, Inc. (U.S.) Offers Google Cloud Services-based NGS Platform for Food Safety Testing

4.4.2. Pairend Biotechnology (Turkey) Offers NGS Cloud, an Artificial Intelligence-Supported Genetic Data Analysis Platform
4.5. Porter's Five Forces Analysis
4.5.1. Bargaining Power of Buyers
4.5.2. Bargaining Power of Suppliers
4.5.3. Threat of Substitutes
4.5.4. Threat of New Entrants
4.5.5. Degree of Competition
4.6. Pricing Analysis

5. NEXT-GENERATION SEQUENCING (NGS) MARKET: REGULATORY ANALYSIS

5.1. Introduction
5.2. North America
5.2.1. U.S.
5.2.2. Canada
5.3. Europe
5.4. Asia-Pacific
5.4.1. China
5.4.2. Japan
5.4.3. India
5.5. Latin America
5.6. Middle East

6. NEXT GENERATION SEQUENCING (NGS) MARKET ASSESSMENT—BY OFFERING

6.1. Overview
6.2. Consumables
6.2.1. Sample Preparation Consumables
6.2.1.1. DNA Extraction and Amplification
6.2.1.2. Library Preparation & Target Enrichment
6.2.1.3. Quality Control
6.2.2. Other Consumables
6.3. NGS Platforms/Instruments
6.4. Software
6.5. Services

7. GLOBAL NEXT GENERATION SEQUENCING (NGS) MARKET

ASSESSMENT–BY SEQUENCING TYPE

7.1. Overview
7.2. Targeted Genome Sequencing
7.3. Whole Genome Sequencing
7.4. Whole Exome Sequencing
7.5. Other Sequencing Types

8. GLOBAL NEXT-GENERATION SEQUENCING (NGS) MARKET ASSESSMENT–BY TECHNOLOGY

8.1. Overview
8.2. Sequencing by Synthesis
8.3. Ion Semiconductor Sequencing
8.4. Single-Molecule Real-Time Sequencing (SMRT)
8.5. Nanopore Sequencing
8.6. DNA Nanoball (DNB) Sequencing

9. NEXT-GENERATION SEQUENCING (NGS) MARKET ASSESSMENT–BY APPLICATION

9.1. Overview
9.2. Research and Other Applications
  9.2.1. Drug Discovery
  9.2.2. Agriculture & Animal Research
  9.2.3. Other Research Applications
9.3. Clinical Applications
  9.3.1. Reproductive Health
  9.3.2. Oncology
  9.3.3. Infectious Diseases
  9.3.4. Other Clinical Applications

10. GLOBAL NEXT-GENERATION SEQUENCING (NGS) MARKET ASSESSMENT–BY END USER

10.1. Overview
10.2. Pharmaceutical & Biotechnology Companies
10.3. Hospitals And Diagnostic Laboratories
10.4. Academic Institutes & Research Centers

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10.5. Other End Users

11. NEXT-GENERATION SEQUENCING (NGS) MARKET ASSESSMENT—BY GEOGRAPHY

11.1. Overview
11.2. North America
  11.2.1. U.S.
  11.2.2. Canada
11.3. Europe
  11.3.1. Germany
  11.3.2. France
  11.3.3. U.K.
  11.3.4. Italy
  11.3.5. Spain
  11.3.6. Rest of Europe
11.4. Asia-Pacific
  11.4.1. China
  11.4.2. Japan
  11.4.3. India
  11.4.4. Rest of Asia-Pacific (RoAPAC)
11.5. Latin America
  11.5.1. Brazil
  11.5.2. Mexico
  11.5.3. Rest of Latin America
11.6. Middle East & Africa

12. COMPETITION ANALYSIS

12.1. Overview
12.2. Key Growth Strategies
12.3. Competitive Benchmarking
12.4. Market Share Analysis (2022)
  12.4.1. Illumina, Inc. (U.S.)
  12.4.2. Thermo Fisher Scientific Inc. (U.S.)
  12.4.3. Beijing Genomics Institute (BGI) (China)
12.5. Competitive Dashboard
  12.5.1. Industry Leaders
  12.5.2. Market Differentiators

+44 20 8123 2220
info@marketpublishers.com

12.5.3. Vanguards
12.5.4. Emerging Companies

13. COMPANY PROFILES (BUSINESS OVERVIEW, FINANCIAL OVERVIEW, PRODUCT PORTFOLIO, SWOT ANALYSIS OF TOP 5 COMPANIES, AND STRATEGIC DEVELOPMENTS)

13.1. Thermo Fisher Scientific, Inc.
13.2. Illumina, Inc.
13.3. Qiagen N.V.
13.4. F. Hoffmann-La Roche Ltd
13.5. Perkinelmer, Inc.
13.6. Agilent Technologies, Inc.
13.7. Pacific Biosciences of California, Inc.
13.8. Danaher Corporation
13.9. Bio-Rad Laboratories, Inc.
13.10. Oxford Nanopore Technologies Plc.
13.11. 10X Genomics, Inc.
13.12. Beijing Genomics Institute (BGI)

14. APPENDIX

14.1. Available Customization
14.2. Related Reports

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List Of Tables

LIST OF TABLES

Table 1 Global NGS Market: Impact Analysis of Market Dynamics (2023–2030)
Table 2 Estimated Number of New Cancer Cases, by Type (2020 Vs. 2030)
Table 3 Incidence of Common Genetic Disorders
Table 4 Genome Sequencing Costs (2010–2021)
Table 5 Portable Sequencers Vs. Benchtop Sequencers
Table 6 NGS Instruments Price List
Table 7 NGS Consumables Price List
Table 8 Regulatory Authorities Governing In Vitro Diagnostics & NGS Products, by Country/Region
Table 9 NGS Software: Standards and Compliance Guidelines
Table 10 Global NGS Market, by Offering, 2021–2030 (USD Million)
Table 11 Global NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 12 Global NGS Consumables Market, by Country/Region, 2021–2030 (USD Million)
Table 13 Global NGS Sample Preparation Consumables Market, by Type, 2021–2030(USD Million)
Table 14 Global NGS Sample Preparation Consumables Market, by Country/Region, 2021-2030 (USD Million)
Table 15 Global NGS DNA Extraction and Amplification Consumables Market, by Country/Region, 2021–2030 (USD Million)
Table 16 Global NGS Library Preparation & Target Enrichment Consumables Market, by Country/Region, 2021-2030 (USD Million)
Table 17 Global NGS Quality Control Consumables Market, by Country/Region, 2021-2030 (USD Million)
Table 18 Global Other NGS Consumables Market, by Country/Region, 2021-2030 (USD Million)
Table 19 Some of The Companies Offering NGS Instruments
Table 20 Global NGS Platforms/Instruments Market, by Country/Region, 2021–2030 (USD Million)
Table 21 Key Players Offering NGS Software
Table 22 Global NGS Software Market, by Country/Region, 2021-2030 (USD Million)
Table 23 Key Players Offering NGS Services
Table 24 Global NGS Services Market, by Country/Region, 2021-2030 (USD Million)
Table 25 Global NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 26 Global NGS Market for Targeted Genome Sequencing, by Country/Region,

2021–2030 (USD Million)
Table 27 Global NGS Market for Whole Genome Sequencing, by Country/Region, 2021–2030 (USD Million)
Table 28 Global NGS Market for Whole Exome Sequencing, by Country/Region, 2023–2030 (USD Million)
Table 29 Global NGS Market for Other Sequencing Types, by Country/Region, 2021–2030 (USD Million)
Table 30 GLOBAL NGS Market, by Technology, 2021–2030 (USD Million)
Table 31 Global NGS Market for Sequencing by Synthesis, by Country/Region, 2021–2030 (USD Million)
Table 32 Global NGS Market for Ion Semiconductor Sequencing, by Country/Region, 2021–2030 (USD Million)
Table 33 Global NGS Market for Single-Molecule Real-Time Sequencing, by Country/Region, 2021–2030 (USD Million)
Table 34 Global NGS Market for Nanopore Sequencing, by Country/Region, 2021–2030 (USD Million)
Table 35 Global NGS Market for DNA Nanoball (DNB) Sequencing, by Country/Region, 2021–2030 (USD Million)
Table 36 Global NGS Market, by Application, 2021–2030 (USD Million)
Table 37 Global NGS Market for Research and Other Applications, by Type 2021–2030 (USD Million)
Table 38 Global NGS Market for Research and Other Applications, by Country/Region, 2021–2030 (USD Million)
Table 39 Global NGS Market for Drug Discovery, by Country/Region, 2021–2030 (USD Million)
Table 40 Global NGS Market for Agriculture & Animal Research, by Country/Region, 2021–2030 (USD Million)
Table 41 Global NGS Market for Other Research Applications, by Country/Region, 2021–2030 (USD Million)
Table 42 Global NGS Market for Clinical Applications, by Type 2021–2030 (USD Million)
Table 43 Global NGS Market for Clinical Applications, by Country/Region, 2021–2030 (USD Million)
Table 44 Global NGS Market for Reproductive Health, by Country/Region, 2021–2030 (USD Million)
Table 45 Currently Available Targeted Therapies and Corresponding Biomarkers
Table 46 Global NGS Market for Oncology, by Country/Region, 2021–2030 (USD Million)
Table 47 HIV Prevalence Among Adults, by Region (2020 Vs. 2021)
Table 48 Global NGS Market for Infectious Diseases, by Country/Region, 2021–2030

+44 20 8123 2220
info@marketpublishers.com

(USD Million)
Table 49 Global NGS Market for Other Clinical Applications, by Country/Region, 2021–2030 (USD Million)
Table 50 Global NGS Market, by End User, 2021–2030 (USD Million)
Table 51 Global Pharmaceutical R&D Spending, 2012–2026 (USD Billion)
Table 52 Global NGS Market for Pharmaceutical & Biotechnology Companies, by Country/Region, 2021–2030 (USD Million)
Table 53 Global NGS Market for Hospitals and Diagnostic Laboratories, by Country/Region, 2021–2030 (USD Million)
Table 54 Global NGS market for Academic Institutes & Research Centers, by Country/Region, 2021–2030 (USD Million)
Table 55 Global NGS Market for Other End Users, by Country/Region, 2021–2030 (USD Million)
Table 56 Global NGS Market, by Country/Region, 2021–2030 (USD Million)
Table 57 North America: NGS Market, by Country, 2021–2030 (USD Million)
Table 58 North America: NGS Market, by Offering, 2021–2030 (USD Million)
Table 59 North America: NGS Consumables Market, by TYPE, 2021–2030 (USD Million)
Table 60 North America: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 61 North America: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 62 North America: NGS Market, by Technology, 2021–2030 (USD Million)
Table 63 North America: NGS Market, by Application, 2021–2030 (USD Million)
Table 64 North America: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 65 North America: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 66 North America: NGS Market, by End User, 2021–2030 (USD Million)
Table 67 U.S.: Key Macro & Microindicators
Table 68 U.S.: NGS Market, by Offering, 2021–2030 (USD Million)
Table 69 U.S.: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 70 U.S.: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 71 U.S.: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 72 U.S.: NGS Market, by Technology, 2021–2030 (USD Million)
Table 73 U.S.: NGS Market, by Application, 2021–2030 (USD Million)
Table 74 U.S.: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 75 U.S.: NGS Market, for Research Applications, by Type, 2021–2030 (USD Million)

Table 76 U.S.: NGS Market, by End User, 2021–2030 (USD Million)
Table 77 Canada: Key Macro & Micro Indicators
Table 78 Canada: NGS Market, by Offering, 2021–2030 (USD Million)
Table 79 Canada: NGS Consumables Market, by Type (USD Million)
Table 80 Canada: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 81 Canada: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 82 Canada: NGS Market, by Technology, 2021–2030 (USD Million)
Table 83 Canada: NGS Market, by Application, 2021–2030 (USD Million)
Table 84 Canada: NGS Market, for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 85 Canada: NGS Market, for Research Applications, by Type, 2021–2030 (USD Million)
Table 86 Canada: NGS Market, by End User, 2021–2030 (USD Million)
Table 87 Europe: NGS Market, by Country, 2021–2030 (USD Million)
Table 88 Europe: NGS Market, by Offering, 2021–2030 (USD Million)
Table 89 Europe: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 90 Europe: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 91 Europe: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 92 Europe: NGS Market, by Technology, 2021–2030 (USD Million)
Table 93 Europe: NGS Market, by Application, 2021–2030 (USD Million)
Table 94 Europe: NGS Market, for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 95 Europe: NGS Market, for Research Applications, by Type, 2021–2030 (USD Million)
Table 96 Europe: NGS Market, by End User, 2021–2030 (USD Million)
Table 97 Germany: Key Macro & Micro Indicators
Table 98 Germany: NGS Market, by Offering, 2021–2030 (USD Million)
Table 99 Germany: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 100 Germany: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 101 Germany: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 102 Germany: NGS Market, by Technology, 2021–2030 (USD Million)
Table 103 Germany: NGS Market, by Application, 2021–2030 (USD Million)
Table 104 Germany: NGS Market, for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 105 Germany: NGS Market, for Research Applications, by Type, 2021–2030 (USD Million)

Table 106 Germany: NGS Market, by End User, 2021–2030 (USD Million)
Table 107 France: Key Macro & Indicators
Table 108 France: NGS Market, by Offering, 2021–2030 (USD Million)
Table 109 France: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 110 France: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 111 France: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 112 France: NGS Market, by Technology, 2021–2030 (USD Million)
Table 113 France: NGS Market, by Application, 2021–2030 (USD Million)
Table 114 France: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 115 France: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 116 France: NGS Market, by End User, 2021–2030 (USD Million)
Table 117 U.K.: Key Macro & Micro Indicators
Table 118 U.K.: NGS Market, by Offering, 2021–2030 (USD Million)
Table 119 U.K.: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 120 U.K.: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 121 U.K.: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 122 U.K.: NGS Market, by Technology, 2021–2030 (USD Million)
Table 123 U.K.: NGS Market, by Application, 2021–2030 (USD Million)
Table 124 U.K.: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 125 U.K.: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 126 U.K.: NGS Market, by End User, 2021–2030 (USD Million)
Table 127 Italy: Key Macro & Micro Indicators
Table 128 Italy: NGS Market, by Offering, 2021–2030 (USD Million)
Table 129 Italy: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 130 Italy: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 131 Italy: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 132 Italy: NGS Market, by Technology, 2021–2030 (USD Million)
Table 133 Italy: NGS Market, by Application, 2021–2030 (USD Million)
Table 134 Italy: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 135 Italy: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)

Table 136 Italy: NGS Market, by End User, 2021–2030 (USD Million)
Table 137 Spain: Key Macro & Micro Indicators
Table 138 Spain: NGS Market, by Offering, 2021–2030 (USD Million)
Table 139 Spain: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 140 Spain: NGS Sample Preparation Consumables Market, 2021–2030 (USD Million)
Table 141 Spain: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 142 Spain: NGS Market, by Technology, 2021–2030 (USD Million)
Table 143 Spain: NGS Market, by Application, 2021–2030 (USD Million)
Table 144 Spain: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 145 Spain: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 146 Spain: NGS Market, by End User, 2021–2030 (USD Million)
Table 147 Estimated Number of New Cancer Cases, by Country, 2020 Vs. 2030
Table 148 Rest of Europe: NGS Market, by Offering, 2021–2030 (USD Million)
Table 149 Rest of Europe: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 150 Rest of Europe: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 151 Rest of Europe: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 152 Rest of Europe: NGS Market, by Technology, 2021–2030 (USD Million)
Table 153 Rest of Europe: NGS Market, by Application, 2021–2030 (USD Million)
Table 154 Rest of Europe: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 155 Rest of Europe: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 156 Rest of Europe: NGS Market, by End User, 2021–2030 (USD Million)
Table 157 Asia-Pacific: NGS Market, by Country/Region, 2021–2030 (USD Million)
Table 158 Asia-Pacific: NGS Market, by Offering, 2021–2030 (USD Million)
Table 159 Asia-Pacific: NGS consumables market, by type, 2021–2030 (USD Million)
Table 160 Asia-Pacific: NGS Sample Preparation Consumables Market, by TYPE, 2021–2030 (USD Million)
Table 161 Asia-Pacific: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 162 Asia-Pacific: NGS Market, by Technology, 2021–2030 (USD Million)
Table 163 Asia-Pacific: NGS Market, by Application, 2021–2030 (USD Million)
Table 164 Asia-Pacific: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 165 Asia-Pacific: NGS Market for Research Applications, by Type, 2021–2030

(USD Million)
Table 166 Asia-Pacific: NGS Market, by End User, 2021–2030 (USD Million)
Table 167 China: Key Macro & Micro Indicators
Table 168 China: NGS Market, by Offering, 2021–2030 (USD Million)
Table 169 China: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 170 China: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 171 China: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 172 China: NGS Market, by Technology, 2021–2030 (USD Million)
Table 173 China: NGS Market, by Application, 2021–2030 (USD Million)
Table 174 China: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 175 China: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 176 China: NGS Market, by End User, 2021–2030 (USD Million)
Table 177 Japan: Key Macro & Micro Indicators
Table 178 Japan: NGS Market, by Offering, 2021–2030 (USD Million)
Table 179 Japan: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 180 Japan: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 181 Japan: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 182 Japan: NGS Market, by Technology, 2021–2030 (USD Million)
Table 183 Japan: NGS Market, by Application, 2021–2030 (USD Million)
Table 184 Japan: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 185 Japan: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 186 Japan: NGS Market, by End User, 2021–2030 (USD Million)
Table 187 India: Key Macro & Micro Indicators
Table 188 India: NGS Market, by Offering, 2021–2030 (USD Million)
Table 189 India: NGS consumables market, by Type, 2021–2030 (USD Million)
Table 190 India: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 191 India: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 192 India: NGS Market, by Technology, 2021–2030 (USD Million)
Table 193 India: NGS Market, by Application, 2021–2030 (USD Million)
Table 194 India: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 195 India: NGS Market for Research Applications, by Type, 2021–2030 (USD

Million)
Table 196 India: NGS Market, by End User, 2021–2030 (USD Million)
Table 197 Estimated Number of New Cancer Cases, by Country, 2020 VS. 2030
Table 198 Rest of Asia-Pacific: NGS Market, by Offering, 2021–2030 (USD Million)
Table 199 Rest of Asia-Pacific: NGS Consumables Market, by Type, 2021–2030 (USD million)
Table 200 Rest of Asia-Pacific: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 201 Rest of Asia-Pacific: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 202 Rest of Asia-Pacific: NGS Market, by Technology, 2021–2030 (USD Million)
Table 203 Rest of Asia-Pacific: NGS Market, by Application, 2021–2030 (USD Million)
Table 204 Rest of Asia-Pacific: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 205 Rest of Asia-Pacific: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 206 Rest of Asia-Pacific: NGS Market, by End User, 2021–2030 (USD Million)
Table 207 Latin America: NGS market size, by country, 2021–2030 (USD Million)
Table 208 Latin America: NGS Market, by Offering, 2021–2030 (USD Million)
Table 209 Latin America: NGS Consumables Market, by TYPE, 2021–2030 (USD Million)
Table 210 Latin America: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 211 Latin America: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 212 Latin America: NGS Market, by Technology, 2021–2030 (USD Million)
Table 213 Latin America: NGS Market, by Application, 2021–2030 (USD Million)
Table 214 Latin America: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 215 Latin America: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 216 Latin America: NGS Market, by End User, 2021–2030 (USD Million)
Table 217 Brazil: Key Macro & Micro Indicators
Table 218 Brazil: NGS Market, by Offering, 2021–2030 (USD Million)
Table 219 Brazil: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 220 Brazil: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 221 Brazil: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 222 Brazil: NGS Market, by Technology, 2021–2030 (USD Million)
Table 223 Brazil: NGS Market, by Application, 2021–2030 (USD Million)

Table 224 Brazil: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 225 Brazil: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 226 Brazil: NGS Market, by End User, 2021–2030 (USD Million)
Table 227 Mexico: Key Macro & Micro Indicators
Table 228 Mexico: NGS Market, by Offering, 2021–2030 (USD Million)
Table 229 Mexico: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 230 Mexico: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 231 Mexico: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 232 Mexico: NGS Market, by Technology, 2021–2030 (USD Million)
Table 233 Mexico: NGS Market, by Application, 2021–2030 (USD Million)
Table 234 Mexico: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 235 Mexico: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 236 Mexico: NGS Market, by End User, 2021–2030 (USD Million)
Table 237 Rest of Latin America: NGS Market, by Offering, 2021–2030 (USD Million)
Table 238 Rest of Latin America: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 239 Rest of Latin America: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 240 Rest of Latin America: NGS Market, by Sequencing Type, 2021–2030 (USD Million)
Table 241 Rest of Latin America: NGS Market, by Technology, 2021–2030 (USD Million)
Table 242 Rest of Latin America: NGS Market, by Application, 2021–2030 (USD Million)
Table 243 Rest of Latin America: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 244 Rest of Latin America: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 245 Rest of Latin America: NGS Market, by End User, 2021–2030 (USD Million)
Table 246 Middle East & Africa: NGS Market, by Offering, 2021–2030 (USD Million)
Table 247 Middle East & Africa: NGS Consumables Market, by Type, 2021–2030 (USD Million)
Table 248 Middle East & Africa: NGS Sample Preparation Consumables Market, by Type, 2021–2030 (USD Million)
Table 249 Middle East & Africa: NGS Market, by Sequencing Type, 2021–2030 (USD

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Million)
Table 250 Middle East & Africa: NGS Market, by Technology, 2021–2030 (USD Million)
Table 251 Middle East & Africa: NGS Market, by Application, 2021–2030 (USD Million)
Table 252 Middle East & Africa: NGS Market for Clinical Applications, by Type, 2021–2030 (USD Million)
Table 253 Middle East & Africa: NGS Market for Research Applications, by Type, 2021–2030 (USD Million)
Table 254 Middle East & Africa: NGS Market, by End User, 2021–2030 (USD Million)
Table 255 Recent Developments, by Company, 2020-2023
Table 256 Applications & Methods of Thermofisher NGS Platforms/Instruments (Benchtop Sequencers)
Table 257 Features of Thermofisher NGS Platforms/ Instruments (Benchtop Sequencers)
Table 258 Specifications of Ion Proton System
Table 259 Illumina, Inc. (U.S.): NGS Systems Installed Base & New Installations in 2022
Table 260 Applications & Methods of Illumina NGS Platforms/Instruments (Benchtop Sequencers)
Table 261 Features of Illumina NGS Platforms/ Instruments (Benchtop Sequencers)
Table 262 Applications & Methods of Illumina NGS Platforms/Instruments (Production–Scale Sequencers)
Table 263 Features of Illumina NGS Platforms/ Instruments (Production–Scale Sequencers)
Table 264 Pacific Biosciences of California, Inc. (U.S.): NGS Systems Installed Base

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List Of Figures

LIST OF FIGURES

Figure 1 Research Process
Figure 2 Secondary Sources Referenced for this Study
Figure 3 Primary Research Techniques
Figure 4 Key Executives Interviewed
Figure 5 Breakdown of Primary Interviews (Supply-side & Demand-side)
Figure 6 Market Sizing and Growth Forecast Approach
Figure 7 Global NGS Market, by Offering, 2023 Vs. 2030 (USD Million)
Figure 8 Global NGS Market, by Sequencing Type, 2023 Vs. 2030 (USD Million)
Figure 9 Global NGS Market, by Technology, 2023 Vs. 2030 (USD Million)
Figure 10 Global NGS Market, by Application, 2023 Vs. 2030 (USD Million)
Figure 11 Global NGS Market, by End User, 2023 Vs. 2030 (USD Million)
Figure 12 Global NGS Market, by Geography, 2023 Vs. 2030 (USD Million)
Figure 13 Pharmaceutical R&D Expenditures in the U.S., Europe, and China, 2010 Vs. 2019 Vs. 2020 (USD Million)
Figure 14 Global Pharmaceutical R&D Expenditure, 2012–2026 (USD Billion)
Figure 15 Porter's Five Forces Analysis
Figure 16 USFDA Regulatory Pathways for IVD Kits
Figure 17 EU Regulatory Pathway - IVDR 2017/746
Figure 18 China: Medical Device Classification and Pre-Market Requirements for NGS Instruments
Figure 19 Global NGS Market, by Offering, 2023 Vs. 2030 (USD Million)
Figure 20 Steps of Sample Preparation in a Typical NGS Workflow
Figure 21 Global NGS Market, by Sequencing Type, 2023 Vs. 2030 (USD Million)
Figure 22 Global NGS Market, by Technology, 2023 Vs. 2030 (USD Million)
Figure 23 Global NGS Market, by Application, 2023 Vs. 2030 (USD Million)
Figure 24 U.S.: New Molecular Entity (NME) Approvals
Figure 25 Estimated Number of New Cancer Cases (in Million)
Figure 26 Global NGS Market, by End User, 2023 Vs. 2030 (USD Million)
Figure 27 Global NGS Market, by Geography, 2023 Vs. 2030 (USD Million)
Figure 28 North America: NGS Market Snapshot
Figure 29 U.S.: Pharmaceutical R&D Expenditure, 2014–2021 (USD Billion)
Figure 30 Europe: Pharmaceutical Industry R&D Expenditure (2000–2021)
Figure 31 Europe: NGS Market Snapshot
Figure 32 Italy: Number of Biotechnology Firms, 2010-2021
Figure 33 Roe: Pharmaceutical R&D Expenditure, 2020

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Figure 34 Asia-Pacific: NGS Market Snapshot
Figure 35 Latin America: NGS Market Snapshot
Figure 36 Key Growth Strategies Adopted by Leading Players, 2020– 2023
Figure 37 Next Generation Sequencing (NGS) Market: Competitive Benchmarking by Offering
Figure 38 Next Generation Sequencing (NGS) Market: Competitive Benchmarking, by Region
Figure 39 Global Next Generation Sequencing (NGS) Market Share Analysis, by Key Players, 2022 (%)
Figure 40 Competitive Dashboard: Next Generation Sequencing (NGS) Market
Figure 41 Thermo Fisher Scientific, Inc.: Financial Overview (2022)
Figure 42 Illumina, Inc.: Financial Overview (2022)
Figure 43 Qiagen N.V.: Financial Overview (2022)
Figure 44 F. Hoffmann-La Roche Ltd: Financial Overview (2022)
Figure 45 PerkinElmer, Inc.: Financial Overview (2022)
Figure 46 Agilent Technologies, Inc.: Financial Overview (2022)
Figure 47 Pacific Biosciences of California, Inc.: Financial Overview (2022)
Figure 48 Danaher Corporation: Financial Overview (2022)
Figure 49 Bio-Rad Laboratories: Financial Overview (2022)
Figure 50 Oxford Nanopore Technologies Plc.: Financial Overview (2022)
Figure 51 10X Genomics, Inc.: Financial Overview (2022)
Figure 52 Beijing Genomics Institute (BGI): Financial Overview (2022)

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