

Europe Targeted Sequencing Market By Product Type (Instruments, Services, Kits/Panels and Assays, Others), By Application (Cancer, Reproductive Health, Hereditary Diseases, Neurological Disorders, Infectious Diseases, Cardiovascular Diseases, Rare Diseases, Other), By End Use (Diagnostic and Clinical Laboratories, Academic and Research Institutions, Pharmaceutical and Biotech Companies, Other), By Country, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Europe Targeted Sequencing Market was valued at USD 910.25 million in 2024 and is expected to reach USD 1847.36 million by 2030 with a CAGR of 12.52% during the forecast period. The Europe Targeted Sequencing market is experiencing significant growth due to the increasing demand for personalized healthcare solutions and advancements in genomic research.

Key Market Drivers

Increasing Demand for Precision Medicine

The growing focus on precision medicine in Europe is driving the demand for targeted sequencing technologies. Precision medicine relies on understanding genetic variations to tailor treatments based on individual patient profiles, making targeted sequencing an essential tool in clinical decision-making. With its ability to analyze specific regions of

the genome associated with diseases, targeted sequencing provides more accurate insights than whole-genome sequencing. As personalized therapies become more prevalent, healthcare providers require technologies that can pinpoint genetic mutations and biomarkers that influence treatment responses, fueling the market for targeted sequencing in Europe.

For instance, as per the Medical Device Network article published in 2023, sequencing costs have significantly decreased over time as a result of increased competition and advancements in technology.

Advancements in Technology and Reduced Costs

Advancements in next-generation sequencing (NGS) technologies have significantly lowered the costs associated with targeted sequencing, making it more accessible to researchers and clinicians. Improved sequencing platforms, coupled with enhanced bioinformatics tools for data analysis, have increased the efficiency and accuracy of sequencing. This affordability, alongside the continuous improvement in sequencing accuracy, is accelerating the adoption of targeted sequencing for both research and clinical applications. These technological advancements make it easier for healthcare providers and research institutions across Europe to integrate targeted sequencing into diagnostics, particularly for oncology, rare genetic disorders, and infectious diseases.

Key Market Challenges

Data Management and Interpretation

One of the major challenges faced by the targeted sequencing market in Europe is the complexity of managing and interpreting the vast amounts of data generated by sequencing platforms. High-quality sequencing data require sophisticated bioinformatics tools and computational infrastructure to analyze and interpret results accurately. Healthcare providers and researchers may face challenges in translating this data into clinically actionable insights, especially in the context of complex genetic conditions. Additionally, the lack of standardized data interpretation protocols further complicates the clinical integration of sequencing results.

Regulatory and Ethical Concerns

The increasing use of genetic data in clinical settings raises significant regulatory and ethical concerns in Europe. The storage and use of genetic information are subject to

stringent regulations such as the General Data Protection Regulation (GDPR) to protect patient privacy. Navigating the regulatory landscape, particularly around consent, data sharing, and genetic testing for clinical purposes, can pose challenges for companies offering targeted sequencing solutions. Ensuring compliance with these regulations while providing accurate and reliable sequencing data presents a barrier to the widespread adoption of targeted sequencing technologies in healthcare settings.

Key Market Trends

Integration of Artificial Intelligence (AI) in Data Analysis

One of the key trends in the Europe targeted sequencing market is the increasing integration of artificial intelligence (AI) and machine learning (ML) in data analysis and interpretation. AI-powered algorithms can analyze vast amounts of sequencing data more efficiently, identify patterns, and provide deeper insights into genetic variations linked to diseases. By automating data analysis processes, AI accelerates the identification of actionable biomarkers, improving the speed and accuracy of clinical diagnostics. As AI continues to evolve, it is expected to play an integral role in enhancing the precision and effectiveness of targeted sequencing applications.

Growth in Oncology Applications

Targeted sequencing is becoming increasingly important in oncology, as it allows for a more precise understanding of the genetic mutations driving various cancers. In Europe, the growing adoption of targeted sequencing in cancer diagnosis and treatment is a key trend. Cancer therapies are becoming more personalized, with treatments designed to target specific mutations within cancer cells. Targeted sequencing is crucial for identifying these mutations and helping clinicians select the most appropriate treatment options. This trend is expected to expand as the understanding of cancer genomics continues to evolve, and more targeted therapies are developed for different types of cancer.

Segmental Insights

Product Type Insights

Based on the Product Type, the instruments category in the Europe targeted sequencing market due to the increasing reliance on advanced sequencing technologies for precision diagnostics and research. These instruments are the core

components of targeted sequencing workflows, as they enable the precise amplification and sequencing of specific regions of the genome associated with various diseases. Sequencing instruments, including next-generation sequencing (NGS) platforms, are integral to processing large volumes of genetic data efficiently and accurately. As the demand for personalized medicine grows in Europe, healthcare providers and research institutions are investing heavily in these high-performance instruments to support accurate genetic testing, particularly in oncology, genetic disorders, and infectious diseases.

Moreover, innovations in sequencing instruments, such as improved sensitivity, faster turnaround times, and higher throughput, are driving their widespread adoption across Europe. These instruments are designed to handle complex and large-scale genomic analysis, making them ideal for clinical and research environments. As technology becomes more affordable and accessible, institutions are increasingly incorporating advanced sequencing instruments into their diagnostic and research infrastructure. This trend has contributed to the dominance of the instruments category in the targeted sequencing market, as they remain central to the progress and efficiency of genomic testing in Europe.

Country Insights

Germany was dominating the Europe Targeted Sequencing Market in 2024, due to its robust healthcare infrastructure, advanced research capabilities, and strong investments in biotechnology and genomics. As one of the leading countries in Europe for medical research and technology, Germany is home to numerous research institutions, hospitals, and biotechnology companies that heavily rely on advanced sequencing technologies. The country's well-established healthcare system, coupled with increasing demand for precision medicine, has driven the widespread adoption of targeted sequencing platforms. These platforms are crucial in various medical applications, particularly in oncology, genetic disorders, and personalized therapies, where understanding genetic variations is essential for effective treatment.

Key Market Players

F. Hoffmann-La Roche Ltd

LGC Limited

QIAGEN N.V.

Illumina Inc.

Thermo Fisher Scientific, Inc.

Report Scope:

In this report, the Europe Targeted Sequencing Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Europe Targeted Sequencing Market, By Product Type:

Instruments

Services

Kits/Panels and Assays

Others

Europe Targeted Sequencing Market, By Application:

Cancer

Reproductive Health

Hereditary Diseases

Neurological Disorders

Infectious Diseases

Cardiovascular Diseases

Rare Diseases

Other

Europe Targeted Sequencing Market, By End Use:

Diagnostic and Clinical Laboratories

Academic and Research Institutions

Pharmaceutical and Biotech Companies

Other

Europe Targeted Sequencing Market, By Country:

Germany

Italy

United Kingdom

France

Spain

Greece

Portugal

Bulgaria

Finland

Croatia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Europe Targeted Sequencing Market.

Available Customizations:

Europe Targeted Sequencing Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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