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Targeted Sequencing Market - Global Industry Size, Share, Trends, Competition, Opportunity, and Forecast, Segmented By Product Type (Kits/Panels and Assays, Instruments and Other), By Target Enrichment Method (Amplicon Sequencing, Hybridization Capture, and Others), By Target Capture Type (Targeted DNA Sequencing ,Targeted RNA Sequencing and others), By Application(Oncology, Infectious Diseases, Cardiovascular Diseases, Reproductive Health, Rare Diseases, Neurological Disorders, Hereditary Diseases, and Others), By End Users (Academic and Research Institution, Pharmaceutical and Biotech Companies, Diagnostic & Clinical Laboratories and Other), By Region, By Competition, 2019-2029F

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Abstracts

Global Targeted Sequencing Market was valued at USD 3.51 Billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 11.02% through 2029. The Global Targeted Sequencing Market has witnessed exponential growth in recent years, driven by advancements in sequencing technologies and a burgeoning demand for precision medicine and personalized healthcare solutions. Targeted sequencing, also known as next-generation sequencing (NGS), enables the precise examination of specific regions of interest within the genome, allowing

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researchers and clinicians to efficiently identify variations, mutations, and biomarkers associated with various diseases. This technology has revolutionized biomedical research, clinical diagnostics, and drug discovery processes by offering high-throughput, cost-effective, and accurate sequencing solutions.

Key factors fueling the expansion of the global targeted sequencing market include increasing incidences of genetic disorders and cancer, growing adoption of companion diagnostics, and rising investments in genomics research and development. Moreover, the integration of targeted sequencing with other omics technologies such as transcriptomics, epigenomics, and metabolomics is opening new avenues for comprehensive molecular profiling and deeper insights into biological mechanisms underlying diseases.

Market players are continuously innovating to enhance sequencing accuracy, reduce turnaround times, and lower sequencing costs, thereby making targeted sequencing more accessible and feasible across diverse applications and settings. Additionally, the emergence of cloud-based sequencing platforms and bioinformatics solutions is facilitating data management, analysis, and interpretation, further driving market growth. Despite the immense growth prospects, challenges such as data privacy concerns, reimbursement issues, and complexity in data interpretation remain pertinent. Nonetheless, collaborations between academia, industry, and regulatory bodies, coupled with ongoing technological advancements, are expected to propel the global targeted sequencing market forward, enabling more precise diagnostics, personalized treatments, and improved patient outcomes in the foreseeable future.

Key Market Drivers

Increasing Incidences of Genetic Disorders and Cancer Population

The increasing incidences of genetic disorders and cancer within the global population are significant factors driving the growth of the targeted sequencing market. Genetic disorders, characterized by mutations or abnormalities in an individual's DNA, encompass a wide range of conditions, including cystic fibrosis, Huntington's disease, and muscular dystrophy. According to the World Health Organization (WHO), genetic disorders affect millions of people worldwide, contributing to morbidity, mortality, and healthcare costs. As advancements in medical genetics enable the identification of disease-causing mutations, there is a growing demand for precise and comprehensive sequencing technologies to facilitate genetic testing, diagnosis, and genetic counseling.

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Cancer, a complex genetic disease characterized by the uncontrolled growth and spread of abnormal cells, remains a major public health challenge globally. The incidence of cancer continues to rise, fueled by various factors such as aging populations, lifestyle changes, environmental exposures, and genetic predispositions. According to the International Agency for Research on Cancer (IARC), the global burden of cancer is projected to increase substantially in the coming decades, posing significant challenges to healthcare systems worldwide. Targeted sequencing plays a crucial role in oncology by enabling the identification of somatic mutations, copy number variations, and gene fusions associated with cancer development and progression.

In the context of precision oncology, targeted sequencing-based approaches such as tumor profiling and liquid biopsy hold immense promise for guiding treatment decisions, predicting treatment responses, and monitoring disease progression. By analyzing the genomic landscape of tumors, clinicians can identify actionable mutations and molecular targets for targeted therapies, immunotherapies, and personalized treatment regimens. Additionally, targeted sequencing facilitates the development of companion diagnostics, enabling the selection of appropriate therapies based on the individual's genetic profile. As the prevalence of cancer and genetic disorders continues to rise, there is an escalating demand for advanced genomic technologies capable of delivering accurate and actionable insights into disease etiology, prognosis, and therapeutic responses, thereby driving the growth of the global targeted sequencing market.

Advancements in Sequencing Technologies

Advancements in sequencing technologies have been pivotal in driving the exponential growth of the global targeted sequencing market. Over the past few decades, the field of genomics has witnessed remarkable progress, fueled by continuous innovations in sequencing platforms, chemistry, and bioinformatics tools. These advancements have revolutionized our ability to decode the genetic blueprint of organisms with unprecedented speed, accuracy, and cost-effectiveness.

Next-generation sequencing (NGS) technologies have been at the forefront of this revolution, enabling researchers and clinicians to sequence DNA and RNA molecules at an unprecedented scale. These platforms, which include Illumina's HiSeq, NovaSeq, and MiSeq systems, as well as platforms from other leading manufacturers such as Thermo Fisher Scientific, Oxford Nanopore Technologies, and Pacific Biosciences, offer high-throughput sequencing capabilities, allowing the simultaneous analysis of thousands to millions of DNA fragments in parallel.

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Advancements in sequencing chemistry and library preparation methods have improved sequencing accuracy, read lengths, and coverage uniformity, thereby enhancing the resolution and reliability of sequencing data. For instance, the development of reversible terminator chemistry and nanopore-based sequencing technologies has enabled longer read lengths, reduced error rates, and enhanced base-calling accuracy, enabling researchers to capture complex genomic structures and detect rare genetic variants with greater sensitivity.

The commercialization of third-generation sequencing technologies, such as single-molecule real-time (SMRT) sequencing and nanopore sequencing, has democratized access to long-read sequencing capabilities, offering insights into genomic regions that were previously inaccessible or challenging to sequence. These technologies are particularly valuable for resolving repetitive regions, structural variants, and complex genomic rearrangements, which are often missed or misinterpreted by short-read sequencing methods.

Rising Investments in Genomics Research and Development

The global targeted sequencing market is experiencing a surge in growth driven by rising investments in genomics research and development (RD). Governments, academic institutions, and private companies are increasingly recognizing the transformative potential of genomics in advancing biomedical research, clinical diagnostics, and drug discovery. As a result, significant resources are being allocated to support genomics initiatives aimed at unraveling the complexities of the human genome and its role in health and disease.

One of the key drivers of increased investments in genomics RD is the growing realization of the value of genomic information in understanding disease mechanisms, identifying therapeutic targets, and developing personalized treatment strategies. Genomics research has led to groundbreaking discoveries in various fields, including cancer biology, rare genetic disorders, infectious diseases, and complex traits. By leveraging targeted sequencing technologies, researchers can precisely interrogate specific genomic regions associated with disease susceptibility, drug metabolism, and treatment response, thereby accelerating the pace of biomedical innovation.

The advent of large-scale genomic initiatives, such as the Human Genome Project, the Cancer Genome Atlas, and the UK Biobank, has catalyzed collaborative efforts to generate comprehensive genomic datasets on a global scale. These initiatives have facilitated data sharing, standardization, and harmonization, enabling researchers to

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conduct large-scale genomic studies and identify genetic variants underlying complex diseases and traits.

In addition to academic and governmental investments, there has been a surge in private sector investment in genomics RD, driven by the promise of commercial opportunities in precision medicine, molecular diagnostics, and biopharmaceuticals. Biotechnology companies, pharmaceutical firms, and venture capital investors are actively funding genomic startups and innovation hubs focused on developing novel sequencing technologies, bioinformatics solutions, and genomic-based therapeutics.

Key Market Challenges

Regulatory Hurdles

Another significant challenge facing the global targeted sequencing market is regulatory uncertainty and complexity. As targeted sequencing technologies are used in clinical diagnostics, pharmaceutical development, and agricultural genomics, they are subject to stringent regulatory requirements imposed by health authorities and governing bodies worldwide.

Navigating the regulatory landscape can be particularly daunting for companies seeking to commercialize targeted sequencing products and services. Compliance with regulations such as the U.S. Food and Drug Administration's (FDA) approval process for in vitro diagnostic devices (IVDs) or the European Union's in vitro diagnostic regulation (IVDR) necessitates substantial investments in time, resources, and expertise. Moreover, regulatory frameworks vary across regions, further complicating market entry and expansion strategies.

The lack of harmonization and standardized guidelines for targeted sequencing-based assays poses challenges for market players operating on a global scale. Regulatory delays, uncertainties, and compliance costs can impede innovation and market access, stifling growth opportunities and hampering the adoption of targeted sequencing technologies in clinical settings and beyond.

To overcome regulatory hurdles, stakeholders must engage proactively with regulatory agencies, stay abreast of evolving requirements, and prioritize compliance and quality assurance throughout the product development lifecycle. Collaboration between industry stakeholders, policymakers, and regulatory bodies is essential to streamline regulatory processes, foster innovation, and ensure patient safety and product efficacy.

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Data Analysis and Interpretation

While sequencing technologies have made significant strides in generating vast amounts of genomic data, extracting meaningful insights from this data remains a formidable task. The complexity of genomic data, coupled with the heterogeneity of biological systems, poses challenges for accurate variant calling, annotation, and interpretation.

The integration of multi-omics data, such as transcriptomics, epigenomics, and proteomics, adds another layer of complexity to data analysis workflows. Bioinformatics tools and algorithms play a crucial role in processing, analyzing, and interpreting genomic data, but their efficacy depends on factors such as data quality, sample heterogeneity, and computational resources.

The shortage of skilled bioinformaticians and data scientists capable of handling large-scale genomic datasets poses a bottleneck for market growth. As the volume and complexity of genomic data continue to increase, there is a pressing need for user-friendly, scalable, and interoperable bioinformatics solutions to facilitate data analysis and interpretation across diverse applications. Addressing the challenges associated with data analysis and interpretation requires collaborative efforts between academia, industry, and government agencies to develop robust bioinformatics tools, standardize data formats, and promote data sharing and collaboration. Investing in workforce development and training programs can also help bridge the gap in bioinformatics expertise and empower researchers and clinicians to harness the full potential of targeted sequencing technologies for precision medicine and scientific discovery.

Key Market Trends

Integration with Omics Technologies

The integration of targeted sequencing with other omics technologies is playing a pivotal role in boosting the global targeted sequencing market. Omics technologies encompass various disciplines, including genomics, transcriptomics, proteomics, metabolomics, and epigenomics, each offering unique insights into the molecular landscape of biological systems. By integrating targeted sequencing with omics technologies, researchers can achieve a more comprehensive understanding of the complex interactions between genes, proteins, metabolites, and epigenetic modifications, thereby unraveling the underlying mechanisms of diseases and facilitating precision medicine approaches.

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Integrating targeted sequencing with omics technologies is the ability to perform multi-dimensional molecular profiling, which enables researchers to capture a holistic view of biological processes at the molecular level. For example, by combining targeted sequencing with transcriptomics, researchers can correlate genetic mutations with changes in gene expression, allowing for the identification of key regulatory pathways and potential therapeutic targets. Similarly, integrating targeted sequencing with proteomics and metabolomics enables the characterization of protein-protein interactions, metabolic pathways, and biomarker discovery, providing valuable insights into disease mechanisms and treatment responses.

The integration of targeted sequencing with omics technologies enhances the sensitivity and specificity of molecular profiling, enabling the detection of rare genetic variants, low-abundance transcripts, and subtle changes in protein expression or metabolite levels. This is particularly important in the context of cancer diagnostics and personalized medicine, where accurate identification of actionable mutations and biomarkers is crucial for guiding treatment decisions and predicting therapeutic outcomes.

The integration of targeted sequencing with omics technologies is driving innovation in computational biology and bioinformatics, as researchers develop advanced algorithms and analytical pipelines for integrating and interpreting multi-omics data sets. These bioinformatics solutions enable researchers to extract meaningful insights from complex data, identify biologically relevant patterns and associations, and generate actionable hypotheses for further investigation.

Emergence of Cloud-Based Sequencing Platforms and Bioinformatics Solutions

The emergence of cloud-based sequencing platforms and bioinformatics solutions is playing a crucial role in boosting the global targeted sequencing market. Cloud computing technologies offer scalable, cost-effective, and secure solutions for storing, processing, and analyzing vast amounts of sequencing data, thereby overcoming the computational challenges associated with genomic research and clinical diagnostics. By leveraging cloud-based sequencing platforms and bioinformatics solutions, researchers and clinicians can accelerate data analysis, interpretation, and knowledge discovery, leading to significant advancements in precision medicine and personalized healthcare.

Cloud-based sequencing platform’s ability to provide on-demand access to high-performance computing resources, enabling researchers to analyze large-scale sequencing datasets with unprecedented speed and efficiency. This is particularly

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important in the context of targeted sequencing, where researchers often need to analyze thousands to millions of genomic regions across multiple samples simultaneously. Cloud-based platforms such as Amazon Web Services (AWS), Google Cloud Platform (GCP), and Microsoft Azure offer powerful computational resources, advanced data management tools, and scalable storage solutions tailored to the needs of genomic research and analysis.

Cloud-based sequencing platforms facilitate collaboration and data sharing among researchers and institutions worldwide, enabling seamless integration of multi-omics data sets and enabling large-scale collaborative projects. By providing centralized access to genomic data and analysis pipelines, cloud-based platforms streamline workflows, reduce data silos, and foster interdisciplinary collaborations, thereby accelerating scientific discovery and innovation.

Furthermore, the emergence of cloud-based bioinformatics solutions is democratizing access to advanced analytical tools and algorithms for processing, analyzing, and interpreting sequencing data. These bioinformatics solutions offer user-friendly interfaces, customizable workflows, and pre-configured pipelines for performing a wide range of genomic analyses, from variant calling and annotation to pathway analysis and integrative genomics. By eliminating the need for costly hardware infrastructure and specialized expertise, cloud-based bioinformatics solutions empower researchers and clinicians to leverage state-of-the-art computational resources and bioinformatics tools for genomics research and clinical diagnostics.

Segmental Insights

Product Type Insights

Based on the product type, the kits/panels and assays segment emerged as the dominant segment in the Global Targeted Sequencing Market in 2023.the availability of pre-designed panels and assay kits tailored for specific genomic regions or disease areas has simplified the targeted sequencing workflow, making it more accessible to researchers and clinicians. These kits typically include all the necessary reagents, primers, and protocols required for targeted sequencing experiments, thereby reducing the complexity and time required for experimental setup and optimization.Advancements in sequencing chemistry, library preparation methods, and bioinformatics algorithms have enhanced the sensitivity, specificity, and accuracy of targeted sequencing assays, further driving their adoption in research and clinical settings. These technological advancements have enabled researchers to detect low-

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frequency mutations, rare genetic variants, and structural rearrangements with greater confidence, expanding the utility of targeted sequencing for a wide range of applications.

Target Enrichment Method Insights

Based on the target enrichment method, the hybridization capture segment emerged as the dominant segment in the global targeted sequencing market in 2023.Hybridization Capture offers a versatile and flexible approach to target enrichment, enabling researchers to selectively capture and amplify specific genomic regions of interest. This method utilizes custom-designed probes or baits complementary to the target sequences, allowing for highly specific and efficient capture of DNA or RNA molecules from complex genomic or transcriptomic samples. The flexibility of Hybridization Capture allows researchers to design custom panels targeting genes, exons, or genomic regions relevant to their research interests or clinical applications.

Hybridization Capture exhibits high sensitivity and specificity, enabling the detection of low-frequency mutations, rare genetic variants, and structural rearrangements with exceptional accuracy. By selectively enriching the desired target sequences, Hybridization Capture reduces the complexity of sequencing libraries, thereby improving sequencing depth and coverage uniformity, which are critical for robust variant detection and downstream data analysis.

Regional Insights

North America emerged as the dominant region in the Global Targeted Sequencing Market in 2023, holding the largest market share.North America boasts a robust infrastructure for genomics research and development, with leading academic institutions, research centers, and biotechnology hubs driving innovation in sequencing technologies and applications. The region is home to renowned genomics institutes, such as the Broad Institute, the National Institutes of Health (NIH), and the Jackson Laboratory, which spearhead groundbreaking research initiatives and collaborative projects focused on understanding the genetic basis of diseases and advancing precision medicine.Furthermore, increasing incidences of genetic disorders, cancer, and chronic diseases in North America, coupled with growing demand for personalized medicine and precision oncology, have contributed to the widespread adoption of targeted sequencing technologies across clinical and research settings.

Key Market Players

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MGI Tech Co., Ltd

GENEWIZ Inc

Agilent Technologies, Inc.

Daicel Arbor Biosciences

Danaher Corporation

Illumina, Inc.

LGC Biosearch Technologies

Pacific Biosciences of California Inc

CD Genomics

F. Hoffmann-La Roche Ltd

Report Scope:

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

Targeted Sequencing Market,By Product Type:

oKits/Panels and Assays

oInstruments

oOther

Targeted Sequencing Market,By Target Enrichment Method:

oAmplicon Sequencing

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oHybridization Capture

oOthers

Targeted Sequencing Market,By Target Capture Type:

oTargeted DNA Sequencing

oTargeted RNA Sequencing

oOthers

Targeted Sequencing Market,By End Users:

oAcademic and Research Institution

oPharmaceutical and Biotech Companies

oDiagnostic Clinical Laboratories

oOther

Targeted Sequencing Market,By Application:

oOncology

oInfectious Diseases

oCardiovascular Diseases

oReproductive Health

oRare Diseases

oNeurological Disorders

oHereditary Diseases

oOthers

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Targeted Sequencing Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

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Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Targeted Sequencing Market.

Available Customizations:

Global 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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