

Next-generation Sequencing Library Preparation Market Size, Share and Growth Outlook 2026: By Product Type, By Sequencing Platform Compatibility, By Preparation Type, By Application, By End-User, Companies to 2034

<https://marketpublishers.com/r/N7E914253BAEEN.html>

Date: July 2026

Pages: 190

Price: US\$ 3,482.00 (Single User License)

ID: N7E914253BAEEN

Abstracts

The global Next-generation Sequencing Library Preparation Market size is forecast to increase from \$2.19 Billion in 2026 to \$5.77 Billion in 2034 at a CAGR of 12.87% between 2026 and 2034.

The Next-generation Sequencing Library Preparation market report provides detailed analysis and outlook of Next-generation Sequencing Library Preparation segments including By Product Type (Library Preparation Kits, Automation and Library Prep Instruments), By Sequencing Platform Compatibility (Illumina, Oxford Nanopore Technologies, Thermo Fisher Scientific, Pacific Biosciences, Others), By Preparation Type (Manual/Bench-top Preparation, Automated/High-Throughput Preparation), By Application (Clinical Research, Pharmaceutical and Biotech R&D, Agricultural and Environmental Testing), By End-User (Hospitals and Clinical Laboratories, Biotechnology and Pharmaceutical Companies, Academic and Research Institutes) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Next-generation Sequencing (NGS) Library Preparation Industry Overview

Multiomics, Spatial Biology, and Automation Are Reshaping NGS Library Preparation Workflows

The next-generation sequencing library preparation industry is undergoing rapid transformation as research institutions, clinical laboratories, biopharmaceutical companies, and precision medicine programs increasingly require scalable, high-throughput, and highly reproducible sample preparation solutions. Library preparation remains a critical step in sequencing workflows, directly influencing sequencing accuracy, coverage uniformity, variant detection sensitivity, and downstream biological interpretation. The growing adoption of multiomics research, spatial transcriptomics, single-cell analysis, liquid biopsy applications, and AI-driven biological modeling is driving demand for advanced library preparation technologies capable of processing complex sample types while reducing workflow complexity. Manufacturers are increasingly focusing on automation, workflow integration, and specialized chemistries that improve sequencing performance across genomics, transcriptomics, epigenomics, and proteomics applications.

Spatial Genomics and Multiomic Platforms Are Expanding Research Capabilities

A major industry trend is the convergence of sequencing workflows with spatial biology and multiomics technologies. Illumina strengthened this direction through the launch of the StrataMap Spatial Solution, an end-to-end platform enabling whole-transcriptome analysis at single-cell resolution across large tissue regions. The company's broader strategy also includes development of a fully integrated multiomics ecosystem connecting genomics, proteomics, and epigenomics workflows through Illumina Connected Multiomics, which incorporates streamlined data analysis and AI-enabled biological interpretation. Similarly, 10x Genomics continued deployment of its Chromium and Atera In Situ platforms, leveraging GEM-X partitioning technology and specialized library preparation assays to support high-throughput single-cell and spatial biology applications. These developments reflect growing demand for library preparation systems capable of generating multidimensional datasets for oncology research, biomarker discovery, and drug development.

Specialized Chemistries and Automation Drive Workflow Efficiency

Innovation across the industry is increasingly centered on improving sample preparation efficiency, scalability, and performance across challenging sample types. Twist Bioscience expanded its portfolio through the launch of the TrueAmp Library Preparation Kit and PCR-Free Whole Genome Sequencing Library Preparation Kit, utilizing proprietary enzymes and polymerase technologies optimized for low-input and FFPE-derived samples. New England Biolabs introduced multiple additions to its NEBNext® portfolio, including UltraShear® Long Read fragmentation technology, low-

bias small RNA library preparation solutions, and nucleic acid purification systems designed for sensitive genomic applications such as liquid biopsy testing. QIAGEN further strengthened integrated oncology workflows through the QIAseq xHYB Trinity DNA/RNA Kit and the QIAseq Connect platform, which enables automated processing of up to 192 samples per run with minimal manual intervention. These advancements highlight the industry's movement toward automated, high-throughput, and highly standardized NGS library preparation solutions capable of supporting increasingly complex genomic research and clinical sequencing programs.

Next-generation Sequencing Library Preparation Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Next-generation Sequencing Library Preparation market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Illumina, Inc., Thermo Fisher Scientific Inc., Agilent Technologies, Inc., Danaher Corporation, F. Hoffmann-La Roche Ltd., QIAGEN N.V., PerkinElmer, Inc., BioMérieux SA, Oxford Nanopore Technologies plc, BGI Genomics Co., Ltd.. The Next-generation Sequencing Library Preparation market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Next-generation Sequencing Library Preparation industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Next-generation Sequencing Library Preparation Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Next-generation Sequencing Library Preparation companies

Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

Detailed SWOT Analysis of global and regional Next-generation Sequencing

Library Preparation markets

Competitive analysis including business description, product analysis, and financial profiles

Key country specific analysis detailing key factors shaping the short-term and long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

Next-generation Sequencing Library Preparation Market Competitive Benchmarking and Company Analysis

Leading companies in Next-generation Sequencing Library Preparation industry include- Illumina, Inc., Thermo Fisher Scientific Inc., Agilent Technologies, Inc., Danaher Corporation, F. Hoffmann-La Roche Ltd., QIAGEN N.V., PerkinElmer, Inc., BioMérieux SA, Oxford Nanopore Technologies plc, BGI Genomics Co., Ltd.. The Next-generation Sequencing Library Preparation market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Next-generation Sequencing Library Preparation Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Next-generation Sequencing Library Preparation market remains one of the strongest-performing segments in the country.

The US Next-generation Sequencing Library Preparation Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Next-generation Sequencing Library Preparation market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Next-generation Sequencing Library Preparation industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Next-generation Sequencing Library Preparation markets

Canada's strong Next-generation Sequencing Library Preparation sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Next-generation Sequencing Library Preparation market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Next-generation Sequencing Library Preparation Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Next-generation Sequencing Library Preparation market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Next-generation Sequencing Library Preparation population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Next-generation Sequencing Library Preparation industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the

forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Next-generation Sequencing Library Preparation market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Next-generation Sequencing Library Preparation sales through 2034

France Next-generation Sequencing Library Preparation companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Next-generation Sequencing Library Preparation Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Next-generation Sequencing Library Preparation distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Next-generation Sequencing Library Preparation Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over

the past few years

China Next-generation Sequencing Library Preparation market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Next-generation Sequencing Library Preparation industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Next-generation Sequencing Library Preparation industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Next-generation Sequencing Library Preparation Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Next-generation Sequencing Library Preparation market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Next-generation Sequencing Library Preparation market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts,

with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Next-generation Sequencing Library Preparation Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending.

Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria, and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Next-generation Sequencing Library Preparation Market Segmentation

By Product Type

Library Preparation Kits

Automation and Library Prep Instruments

By Sequencing Platform Compatibility

Illumina

Oxford Nanopore Technologies

Thermo Fisher Scientific

Pacific Biosciences

Others

By Preparation Type

Manual/Bench-top Preparation

Automated/High-Throughput Preparation

By Application

Clinical Research

Pharmaceutical and Biotech R&D

Agricultural and Environmental Testing

By End-User

Hospitals and Clinical Laboratories

Biotechnology and Pharmaceutical Companies

Academic and Research Institutes

Leading Companies in Next-generation Sequencing Library Preparation Industry (2026)

Illumina, Inc.

Thermo Fisher Scientific Inc.

Agilent Technologies, Inc.

Danaher Corporation

F. Hoffmann-La Roche Ltd.

QIAGEN N.V.

PerkinElmer, Inc.

BioMérieux SA

Oxford Nanopore Technologies plc

BGI Genomics Co., Ltd.

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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 - Illumina
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 - Thermo Fisher Scientific
 - Pacific Biosciences
 - Others
- By Preparation Type
 - Manual/Bench-top Preparation
 - Automated/High-Throughput Preparation
- By Application
 - Clinical Research
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