

Sequencing Market Size, Share and Growth Outlook 2026: By Offering (Consumables, Instruments and Platforms, Services, Bioinformatics Tools), By Technology, By Application, By End User, Companies to 2034.

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Abstracts

The global Sequencing Market size is forecast to increase from \$23.16 Billion in 2026 to \$108.48 Billion in 2034 at a CAGR of 21.29% between 2026 and 2034.

The Sequencing market report provides detailed analysis and outlook of Sequencing segments including By Offering (Consumables, Instruments and Platforms, Services, Bioinformatics Tools), By Technology (Sequencing by Synthesis (SBS), Ion Semiconductor Sequencing, Single-Molecule Real-Time (SMRT) Sequencing, Nanopore Sequencing, Other Sequencing Technologies), By Application (Oncology, Clinical Investigation and Diagnostics, Drug Discovery and Development, Agrigenomics and Forensics, Consumer Genomics), By End User (Academic and Research Institutes, Pharmaceutical and Biotechnology Companies, Clinical and Diagnostics Laboratories, Hospitals and Clinics, Other End Users) 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.

Sequencing Industry Overview

Ultra-High Sensitivity Detection, Multiomics, and Large-Scale Genomic Discovery Are Transforming the Sequencing Industry

The sequencing industry continues to experience rapid technological advancement driven by increasing demand for precision medicine, molecular diagnostics, oncology

research, population genomics, and artificial intelligence-enabled biological discovery. Advances in sequencing chemistry, computational biology, and analytical sensitivity are enabling researchers and clinicians to characterize biological systems with unprecedented accuracy and scale. The industry is increasingly moving beyond conventional genomic sequencing toward integrated platforms capable of supporting molecular residual disease monitoring, metagenomics, multiomics analysis, and large-scale biological discovery initiatives.

Ultra-Sensitive Molecular Detection Is Expanding Clinical Applications

One of the most important trends shaping the sequencing industry is the development of technologies capable of detecting extremely low-abundance molecular signals for applications such as molecular residual disease monitoring and precision oncology. Researchers and diagnostic developers are increasingly seeking platforms that provide ultra-high sensitivity while maintaining scalability and cost efficiency. This trend is illustrated by Ultima Genomics' presentation of data demonstrating that its ppmSeq® technology can achieve single-digit parts-per-million sensitivity for circulating tumor DNA detection without requiring customized panel designs. Such capabilities have the potential to significantly expand the clinical utility of molecular residual disease monitoring and personalized cancer surveillance strategies.

Distributed Genomic Testing and Clinical Sequencing Workflows Are Accelerating Adoption

The growing demand for decentralized molecular testing is driving the development of sequencing workflows designed for broader clinical implementation and improved accessibility. Manufacturers are increasingly focusing on technologies capable of delivering highly sensitive genomic analysis across distributed laboratory networks while maintaining analytical consistency. This market evolution is reflected by Illumina's introduction of a new molecular residual disease research solution built on the NovaSeq X platform. By combining high-throughput sequencing capabilities with ultra-sensitive detection performance, the company is supporting the expansion of precision oncology testing beyond centralized reference laboratories and into broader clinical settings.

Long-Read Sequencing and Artificial Intelligence Are Expanding Genomic Discovery

The sequencing industry is increasingly leveraging long-read sequencing technologies and artificial intelligence to enable large-scale biological discovery and accelerate therapeutic innovation. High-fidelity sequencing platforms are becoming essential tools

for complex genomic analysis, biodiversity research, and AI-driven drug development. This trend is demonstrated by Pacific Biosciences' collaboration with Basecamp Research on the Trillion Gene Atlas initiative, which utilizes HiFi sequencing technologies, the Revio™ system, and advanced sequencing chemistries to characterize biological diversity across multiple continents. The integration of high-accuracy long-read sequencing with artificial intelligence-driven therapeutic discovery reflects the growing convergence of genomics, computational biology, and next-generation pharmaceutical development.

Sequencing Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Sequencing 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., Pacific Biosciences of California, Inc. (PacBio), Oxford Nanopore Technologies plc, BGI Group, F. Hoffmann-La Roche Ltd, Agilent Technologies, Inc., QIAGEN N.V., PerkinElmer, Inc. (Revvity, Inc.), MacroGen, Inc.. The Sequencing 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 Sequencing industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

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

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Sequencing 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 Sequencing 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

Sequencing Market Competitive Benchmarking and Company Analysis

Leading companies in Sequencing industry include- Illumina, Inc., Thermo Fisher Scientific Inc., Pacific Biosciences of California, Inc. (PacBio), Oxford Nanopore Technologies plc, BGI Group, F. Hoffmann-La Roche Ltd, Agilent Technologies, Inc., QIAGEN N.V., PerkinElmer, Inc. (Revvity, Inc.), MacroGen, Inc.. The Sequencing 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 Sequencing 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 Sequencing market remains one of the strongest-performing segments in the country.

The US Sequencing 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 Sequencing 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 Sequencing 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 Sequencing markets

Canada's strong Sequencing 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 Sequencing 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 Sequencing 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 Sequencing 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 Sequencing population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Sequencing 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 Sequencing market outlook.

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

France Sequencing 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 Sequencing 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 Sequencing 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 Sequencing Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

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

Indian Sequencing 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 Sequencing 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 Sequencing 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.

Sequencing Market Segmentation

By Offering

Consumables

Instruments and Platforms

Services

Bioinformatics Tools

By Technology

Sequencing by Synthesis (SBS)

Ion Semiconductor Sequencing

Single-Molecule Real-Time (SMRT) Sequencing

Nanopore Sequencing

Other Sequencing Technologies

By Application

Oncology

Clinical Investigation and Diagnostics

Drug Discovery and Development

Agrigenomics and Forensics

Consumer Genomics

By End User

Academic and Research Institutes

Pharmaceutical and Biotechnology Companies

Clinical and Diagnostics Laboratories

Hospitals and Clinics

Other End Users

Leading Companies in Sequencing Industry (2026)

Illumina, Inc.

Thermo Fisher Scientific Inc.

Pacific Biosciences of California, Inc. (PacBio)

Oxford Nanopore Technologies plc

BGI Group

F. Hoffmann-La Roche Ltd

Agilent Technologies, Inc.

QIAGEN N.V.

PerkinElmer, Inc. (Revvity, Inc.)

Macrogen, Inc.

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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- Services

Bioinformatics Tools

By Technology

Sequencing by Synthesis (SBS)

Ion Semiconductor Sequencing

Single-Molecule Real-Time (SMRT) Sequencing

Nanopore Sequencing

Other Sequencing Technologies

By Application

Oncology

Clinical Investigation and Diagnostics

Drug Discovery and Development

Agrigenomics and Forensics

Consumer Genomics

By End User

Academic and Research Institutes

Pharmaceutical and Biotechnology Companies

Clinical and Diagnostics Laboratories

Hospitals and Clinics

Other End Users

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Oxford Nanopore Technologies plc
BGI Group
F. Hoffmann-La Roche Ltd
Agilent Technologies, Inc.
QIAGEN N.V.
PerkinElmer, Inc. (Revvity, Inc.)
Macrogen, Inc.

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