

Short-read Sequencing Market Size, Share and Growth Outlook 2026: By Offering (Product and Services) (Instruments, Consumables, Services), By Platform Technology, By Application, By End User, Companies to 2034.

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Abstracts

The global Short-read Sequencing Market size is forecast to increase from \$7.1 Billion in 2026 to \$26.13 Billion in 2034 at a CAGR of 17.69% between 2026 and 2034.

The Short-read Sequencing market report provides detailed analysis and outlook of Short-read Sequencing segments including By Offering (Product and Services) (Instruments, Consumables, Services), By Platform Technology (Sequencing by Synthesis (SBS), Sequencing by Binding (SBB), Sequencing by Ligation (SBL)), By Application (Whole Genome Sequencing (WGS), Whole Exome Sequencing (WES), Targeted Sequencing and Gene Panels), By End User (Academic and Research Institutes, Pharmaceutical and Biotechnology Companies, Clinical Research and Diagnostic Laboratories) 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.

Short-read Sequencing Industry Overview

Spatial Biology, Multiomics, and Clinical Genomics Are Expanding the Capabilities of Short-Read Sequencing

The short-read sequencing industry is undergoing a major technological transformation as traditional DNA sequencing platforms evolve into integrated multiomic and spatial biology ecosystems. While short-read sequencing remains the foundational technology

for genomics, transcriptomics, liquid biopsy testing, and precision medicine, manufacturers are increasingly extending these platforms into spatial transcriptomics, epigenomics, and in situ molecular profiling applications. Growing demand for high-throughput biomarker discovery, minimal residual disease monitoring, translational oncology research, and multiomic characterization is driving investment in advanced chemistries, automated workflows, and artificial intelligence-enabled analytical pipelines. These developments are reinforcing short-read sequencing as a central analytical infrastructure for both research and clinical diagnostics.

Spatial Transcriptomics and In Situ Sequencing Are Redefining Molecular Profiling

One of the most important developments in the short-read sequencing market is the convergence of sequencing technologies with spatial biology workflows. Supporting this transition, Singular Genomics launched the G4X™ Spatial Sequencer, utilizing proprietary Direct-Seq™ in situ chemistry to directly interrogate transcriptomic information, fluorescent histology morphology, and immune receptor clonotypes within formalin-fixed paraffin-embedded tissue sections. This architecture enables simultaneous spatial and molecular characterization of tumor microenvironments while supporting high-throughput translational medicine applications. Similarly, Illumina expanded its spatial biology portfolio through the commercial launch of the StrataMap™ Spatial Solution, providing an automated whole-transcriptome workflow designed for scalable spatial analysis across benchtop sequencing systems.

Multiomic Integration and Advanced Bioinformatics Are Accelerating Precision Medicine Applications

The short-read sequencing industry is also advancing through improvements in computational biology, epigenomic profiling, and integrated multiomic analysis. Illumina strengthened its bioinformatics ecosystem with the deployment of DRAGEN v4.5 software, enabling analysis of simultaneous genomic and methylomic profiles through its emerging 5-base sequencing assays while enhancing sensitivity for minimal residual disease liquid biopsy workflows on NovaSeq X systems. Concurrently, Element Biosciences expanded the capabilities of its AVITI24™ platform through the introduction of Direct In Sample Sequencing consumables that bypass conventional library preparation workflows by directly profiling molecular architecture within intact biological samples. By enabling simultaneous cell profiling and targeted transcript quantification on a single flow cell, these innovations support increasingly sophisticated applications in neonatal research, precision oncology, and multiomic biomarker discovery, highlighting the industry's transition toward fully integrated molecular characterization platforms.

Short-read Sequencing Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Short-read 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., Complete Genomics (MGI Tech), Thermo Fisher Scientific Inc., QIAGEN N.V., BGI Group, Agilent Technologies, Inc., F. Hoffmann-La Roche Ltd., Pacific Biosciences, PerkinElmer, Inc., Bio-Rad Laboratories, Inc.. The Short-read 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 Short-read Sequencing industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

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

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Short-read 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 Short-read 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

Short-read Sequencing Market Competitive Benchmarking and Company Analysis

Leading companies in Short-read Sequencing industry include- Illumina, Inc., Complete Genomics (MGI Tech), Thermo Fisher Scientific Inc., QIAGEN N.V., BGI Group, Agilent Technologies, Inc., F. Hoffmann-La Roche Ltd., Pacific Biosciences, PerkinElmer, Inc., Bio-Rad Laboratories, Inc.. The Short-read 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 Short-read 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 Short-read Sequencing market remains one of the strongest-performing segments in the country.

The US Short-read 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 Short-read 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 Short-read 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 Short-read Sequencing markets

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

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

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

China Short-read 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 Short-read 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 Short-read 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 Short-read 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 Short-read 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 Short-read 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 Short-read 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.

Short-read Sequencing Market Segmentation

By Offering (Product and Services)

Instruments

Consumables

Services

By Platform Technology

Sequencing by Synthesis (SBS)

Sequencing by Binding (SBB)

Sequencing by Ligation (SBL)

By Application

Whole Genome Sequencing (WGS)

Whole Exome Sequencing (WES)

Targeted Sequencing and Gene Panels

By End User

Academic and Research Institutes

Pharmaceutical and Biotechnology Companies

Clinical Research and Diagnostic Laboratories

Leading Companies in Short-read Sequencing Industry (2026)

Illumina, Inc.

Complete Genomics (MGI Tech)

Thermo Fisher Scientific Inc.

QIAGEN N.V.

BGI Group

Agilent Technologies, Inc.

F. Hoffmann-La Roche Ltd.

Pacific Biosciences

PerkinElmer, Inc.

Bio-Rad Laboratories, 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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