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Global Next Generation Sequencing

April 2018



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About This Report

Scope & Method

This report forecasts to 2022 the global market for next generation sequencing products and services by type and major world region in nominal US dollars. Type segments include:

- consumables
- instrumentation
- services

Major world regions include:

- US
- Europe
- APAC
- Rest of World

To illustrate historical trends, world, type, and regional demand are provided for 2016 and 2017.

To provide context, this report estimates the size of the global market for capillary electrophoresis sequencing systems (based on the early Sanger sequencing method) in 2016 and 2017, with a forecast to 2022. However, the focus of this report is on next generation sequencing.

Unless otherwise indicated, both historical and forecasted market values are expressed in US dollars at a fixed 2017 rate of exchange with local currencies.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Sources

Global Next Generation Sequencing (FW40083) is based on *Next Generation Sequencing Markets* published by Kalorama Information.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 9 | NAICS & SIC Codes Related to Next Generation Sequencing

| NAICS/SCIAN 2007 | | SIC | |
|---|---|------------------------------------|--|
| North American Industry Classification System | | Standard Industrial Classification | |
| 325412 | Pharmaceutical Preparation Mfg | 2834 | Pharmaceutical Preparations |
| 325413 | In-Vitro Diagnostic Substance Mfg | 2835 | In Vitro and In Vivo Diagnostic Substances |
| 325414 | Biological Product (except Diagnostic) Mfg | 2836 | Biological Products, Except Diagnostic Substances |
| 423450 | Medical, Dental, and Hospital Equipment and Supplies Merchant Wholesalers | 5047 | Medical, Dental, and Hospital Equipment and Supplies |

Source: US Census Bureau

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Resources

Kalorama Information

Next Generation Sequencing Markets, April 2018

The Freedonia Group

Freedonia Industry Studies

Disposable Medical Supplies in the US, June 2018

Pharmaceutical Packaging Market in the US, June 2017

Medical Implants in the US, November 2016

World Medical Disposables, August 2016

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Global Telehealth Products & Services

Healthcare: United States

Healthcare Insurance: United States

Healthcare VR/AR Systems: United States

Medical Equipment & Supplies: United States

Medical Services: United States

Pharmaceuticals: United States

World Cell-Free DNA

World Needle-Free Drug Delivery Systems

World Personalized Medicine Tests for Cancer

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Drug Topics

Hospitals & Health Networks

Infection Control Today

Medical Design Technology

Medical Device & Diagnostic Industry

Modern Healthcare

Qmed

Agencies & Associations

Advanced Medical Technology Association

American Cancer Society

American Medical Association

Association for the Advancement of Medical Instrumentation

About This Report

Medical Device Manufacturers Association
National Institutes of Health
Pharmaceutical Research and Manufacturers of America
United States Department of Health & Human Services
World Health Organization