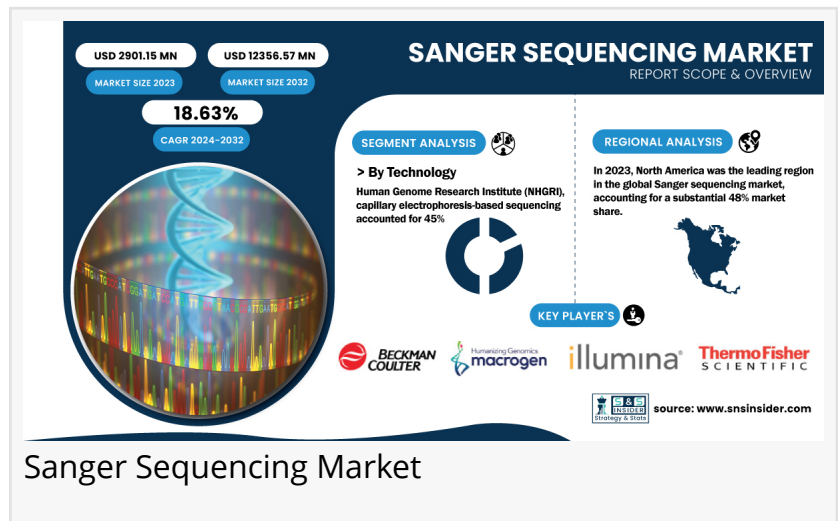


Sanger Sequencing Market to Reach \$12.35 Billion by 2032, Growing at a CAGR of 18.63%

Strong Government Investments and Precision Medicine Propel Growth in Sanger Sequencing Market, Expected to Quadruple Its Size Over the Next Decade

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According to Research by SNS Insider, the [Sanger Sequencing Market](#) size was valued at USD 2,901.15 million in 2023 and is projected to reach an impressive USD 12,356.57 million by 2032, growing at a compound annual growth rate (CAGR) of 18.63% during the forecast period 2024–2032.



Government Support and Advancements Driving Growth in the Sanger Sequencing Market

The Sanger sequencing market has experienced significant growth in recent years, propelled by innovations in genome sequencing technologies, biotechnology, and robust governmental backing. In 2023, the U.S. National Institutes of Health (NIH) announced that worldwide governments invested more than USD 40 billion in genomic research, driving the need for Sanger sequencing equipment. Likewise, the Horizon Europe initiative by the European Commission designated 2.7 billion euros, highlighting the incorporation of genomics into precision medicine. Initiatives such as the U.S.'s "All of Us" research project and the UK's 100,000 Genomes Project have broadened the use of Sanger sequencing in clinical diagnostics and tailored medicine. The increasing rates of genetic disorders, the heightened need for accurate diagnostics, and the rising use of sequencing in research and healthcare are driving market growth, bolstered by progress in pharmaceuticals and biotechnology.

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Key Players in Sanger Sequencing Market

- Thermo Fisher Scientific: Applied Biosystems 3130xl Genetic Analyzer

- Eurofins Scientific: Eurofins Genomics Sanger Sequencing
- LGC Group: LGC Sanger Sequencing
- Macrogen: Macrogen Sanger Sequencing
- Beckman Coulter: CEQ 8000 Genetic Analysis System
- Illumina: MiSeq Sanger Sequencing
- Qiagen: GeneRead Sanger Sequencing Kits
- BGI Group: BGI Sanger Sequencing Service
- Agilent Technologies: 2100 Bioanalyzer
- PerkinElmer: Applied Biosystems 3500 Genetic Analyzer
- SequeGen: SequeGen Sanger Sequencing
- GenScript: GenScript Sanger Sequencing
- Creative Biolabs: Creative Biolabs Sanger Sequencing
- Genewiz: Genewiz Sanger Sequencing
- Nebula Genomics: Nebula Sanger Sequencing
- GeneDx: GeneDx Sanger Sequencing
- Invitae: Invitae Sanger Sequencing
- Myriad Genetics: Myriad Genetics Sanger Sequencing
- Sanger Institute: Sanger Institute Sanger Sequencing
- University of Washington: University of Washington Sanger Sequencing & Other Players

Segment Analysis

By Type, the Reagents and Consumables segment dominated the market contributing to 40% of Sanger sequencing market share in 2023.

This domination is due to the repeated requirement for reagents like DNA polymerases, primers, and nucleotides every sequencing run. The U.S. Food and Drug Administration (FDA) estimated that in 2023, 55% of laboratory genetic tests were based on sequencing protocols and that one of the main methods of sequencing was Sanger sequencing. The increasing adoption of genetic testing in both clinical and research laboratories is fueling the demand for consumables.

The molding of this segment's growth has been greatly stimulated by government-funded research initiatives and public-private partnerships. In 2023, the NIH reported a total investment of USD 11 billion into gene-related studies, where at least half of the allocation was used for reagents and consumables. Also, increasing diagnostic testing post-pandemic, especially for inherited illness mutations, guarantees continuous market growth, further tightening this niche segment's dominance.

By Application, the Clinical Diagnostics segment dominated the Sanger sequencing market, contributing to approximately 38% of the market share in 2023.

The rising adoption of Sanger sequencing for mutation detection and confirmation for the treatment of inherited diseases is anticipated to improve emerging genetic mutation detection techniques. Genetic testing is on the rise, with test volumes growing by 30% in 2023, according to

a report from the Centers for Disease Control and Prevention (CDC), and Sanger sequencing systems have been playing a huge role in diagnosing diseases, including cystic fibrosis, muscular dystrophy, and a wide variety of cancers.

This has led to greater integration of Sanger sequencing into diagnostics, with even more government funding supporting this further. In 2023, the U.S. government paid USD 6 billion for genetic testing via programs such as Medicare and Medicaid, a large fraction of which went towards sequencing for disease screening. Efforts like the Cancer Moonshot have propelled Sanger sequencing's capability in clinical environments, stressing its accuracy and reliability in identifying genetic alterations that will further ensure sustained expansion across its utilization.

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Sanger Sequencing Market Segmentation

By Type

- Reagents and Consumables
- Instruments
- Software
- Services

By Technology

- Capillary Electrophoresis
- Microfluidics
- Automated Sequencing Systems

By Application

- Clinical Diagnostics
- Research and Development
- Pharmaceuticals
- Forensics

By End-User

- Academic and Research Institutes
- Clinical Laboratories
- Pharmaceutical and Biotechnology Companies
- Government and Forensic Labs

Regional Analysis

In 2023, North America dominated the Sanger sequencing market with a 48% market share. The region's strong research ecosystem, advanced healthcare infrastructure, and significant government investment in genomics have all contributed to this leadership. In 2023, USD 22.8

billion was allocated by the U.S. government for genomics research, with a significant fraction funding sequencing technologies, including Sanger sequencing (NIH, 2023b). Additionally, efforts like the Precision Medicine Initiative have spurred the use of sequencing technologies by integrating them into routine healthcare services, thus supporting further growth in the market in the region.

Recent Developments

- In August 2023, PacBio announced its agreement to acquire Apton Biosystems, aiming to accelerate the development of short-read sequencing technologies and drive market growth.
- August 2023, PacBio revealed a research collaboration with the University of Washington to evaluate the capabilities of HiFi long-read whole-genome sequencing (WGS), enhancing diagnostic accuracy for individuals with various genetic disorders.
- In June 2023, Illumina, Inc. introduced PrimateAI-3D, an advanced artificial intelligence (AI) software designed to precisely predict disease-causing genetic mutations, further increasing demand for genomic sequencing technologies to better understand genetic profiles.

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