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Point-of-Care DNA Testing: Redefining Personalised Medicine

The steady growth of the next-generation sequencing (NGS) market in Western Europe is expected to continue thanks to a variety of new applications, from comprehensive oncology panels to non-invasive prenatal analysis to food testing. Major market potential exists in areas such as pre-implantation genetic diagnosis, infectious disease and companion diagnostics, according to a new report published by Frost & Sullivan.

From Laboratory to Bedside

Western European Next-generation Sequencing Markets reports that NGS market revenues are expected to reach $697.3 million by 2018, from $381.9 million in 2013. Both next-generation sequencers and reagents for research and diagnosis are included in the total market defined by the study.

Frost & Sullivan Healthcare's Senior Industry Analyst, Divyaa Ravishankar, states that NGS capabilities will be added to the portfolios of companies that design instruments targeting specific needs, as healthcare becomes increasingly individualised. As personalised medicine confronts developments in the field of genomic research, NGS will be more visible across the clinical diagnostic spectrum. It will move from the laboratory to point-of-care environments.

Reimbursement Restrains Potential

Despite the robust growth of this market, participants are challenged by the lack of reimbursement norms. NGS testing is not available everywhere to the same degree, and this geographical disparity necessitates the shipping of samples across borders. This is currently the case for Western European countries such as Belgium, France, Germany, Italy, Spain and the UK.

Vendors and manufacturers play key roles. Manufacturers are encouraged to adhere to guidelines which

facilitate the generation of reimbursement codes, with CE marking policies preferred over laboratory developed test (LDT) policies. Vendors who design business models focused on rapid regulatory clearance and those who establish strong partnerships with regulators have a clear advantage.

Future Applications

Beyond personalised medicine, NGS stands to benefit other markets. Food is an area of significant potential, with on-the-spot molecular diagnostics sure to influence crop development and safety testing. The ready application of sequence-based tests to raw samples will generate data rapidly, representing a valuable tool in the marketplace.

The NGS market report is part of Frost & Sullivan's Life Sciences Growth Partnership Service program, a series of studies which evaluate market opportunities and industry trends. Some reports related to this one include Global Next Generation Sequencing Informatics Market, Global Tissue Diagnostic Market, and Global Analysis of MicroRNA Tools and Services Market.

Source: Frost & Sullivan

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