


 genomeweb

# In Sequence

The Inside Read on Genome Sequencing

April 19, 2013

## Sequencing Survey Finds Customers Happiest with HiSeq 2500

by *Monica Heger*

**A SURVEY CONDUCTED** by investment firm Macquarie Research on next-generation sequencing found that customers are most satisfied with their Illumina HiSeq 2500 instruments compared to other sequencing systems.

The platform, which has the capability to sequence a whole genome in around 27 hours, scored higher marks than the system's predecessor, the HiSeq 2000; the Illumina MiSeq; and also a competitor's instruments — Life Technologies' Ion Torrent PGM and Ion Proton.

The survey was conducted at the end of March and had 50 respondents. Just over half of respondents were located in the US. Around 64 percent were government or academic users, 24 percent were affiliated with a hospital or clinic, and 12 percent were associated with a service provider.

Around half of the respondents own a HiSeq 2000 and 34 percent had upgraded to, or purchased, a new HiSeq 2500. Fifty-eight percent of the respondents own a MiSeq, 48 percent own a PGM, and about 22 percent of users had purchased a Proton. Cross-ownership of platforms was common, and Macquarie estimated that the survey represented around 90 HiSeqs, 41 MiSeqs, 43 PGMs, and 17 Protons.

Macquarie assessed customer satisfaction with each of the platforms and found that 100 percent of HiSeq 2500 owners described the purchase as excellent or above average. Overall, the HiSeq 2500 was the highest rated instrument, while customers

were least satisfied with the PGM — only 50 percent gave it an above average or excellent rating, while 27 percent gave it a below average rating, and 5 percent gave it an extremely poor rating.

Interestingly, of the PGM owners, those that did not also own an Illumina system were more satisfied with the instrument than PGM owners in general, with 67 percent of users rating the platform as above average or excellent.

The HiSeq 2000, MiSeq, and Proton all received similar marks with 88 percent, 82 percent, and 88 percent of respective owners describing the system as above average or excellent.

Breaking out instrument ownership by users, the firm found that HiSeq is the dominant platform in the US, with the benchtops the dominant systems outside the US. Seventy percent of US users own a HiSeq, compared to only 43 percent of non-US users. However, outside the US, 52 percent of users own a MiSeq and 52 percent of users own a PGM.

In addition, HiSeq and MiSeq are the primary systems among government and academic users, with 55 percent of users owning those systems. More hospital and clinic users are using the Proton compared to academic and government users — 33 percent versus 13 percent. However, the majority of hospital and clinic users, around 67 percent, own a HiSeq.

Of the 50 respondents, 16 have a HiSeq 2500, 24 a HiSeq 2000, 28 own a MiSeq, 22 own a PGM, and eight own a Proton.

The firm also asked users about their spending plans regarding sequencing in the next year. Only 31 percent said that they are either very likely or completely likely to buy a new instrument, with 23 percent replying that they are not at all likely to buy a new system. However, around 39 percent of respondents plan to outsource more over the next year.

Macquarie estimated that Illumina is dominating the sequencing market with 64 percent of the \$1.1 billion market. Life Tech is second with an estimated 22 percent of the market, while Roche, Pacific Biosciences, and Complete Genomics each have a piece of the remaining 14 percent.



www.genomeweb.com  
The GenomeWeb Intelligence Network