

Cancer Registry Software Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The cancer registry software market is projected to register a CAGR of 10.3% during the forecast period 2022-2027.

Due to the COVID-19 pandemic, the diagnostics for cancer decreased significantly during the pandemic, and there has been a decline in chemotherapy, surgery, and other supportive treatments for cancer. Further, in June 2020, guidance was issued by the European Society of Gastrointestinal Endoscopy and the European Society of Gastroenterology and Endoscopy Nurses and Associates. The guidance document advised that doctors postpone post-endoscopic resection, surgical resection of cancer, and post-polypectomy cancer. They also advised that screening of high-risk patients for cancer should also be postponed due to the risk of infection, which further led to the reduction in the treatment procedures.

Similarly, in January 2022, a research study published titled "Impact of the COVID-19 pandemic on population-based cancer registry" stated that many cancer registries worldwide reported disruption to their operations during the early COVID-19 pandemic. Governmental commitment to support future registry operations as an asset to disease control, alongside a move toward electronic reporting systems, will help to ensure the sustainability of cancer surveillance worldwide.

Factors such as increasing prevalence of cancer, and improving quality of care, and reducing healthcare costs coupled with recent developments by key players such as product/service launches and mergers & acquisitions are expected to increase the market growth in the upcoming future. According to the Global Cancer Observatory (Globocan) 2020 statistics, Globally, there were 19.3 million new cancer cases in 2020, these cases are expected to increase and reach up to 30.2 million in 2040. Additionally, according to estimates from the International Agency for Research on Cancer (IARC) updates from July 2021, by 2040, the global burden of cancers is expected to grow to 27.5 million new cancer cases and 16.3 million deaths worldwide. Such high burdens will increase the demand for cancer registry software as it would provide significant advantages to identifying the trend related to the

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prevalence and treatment of cancer.

Similarly, product approval and launches are other factors for the growth of the market. For instance, in April 2020, Elekta received a CE mark for its ProKnow cloud-based retrieval and storage software. With vendor-neutral ProKnow, any radiation therapy department can securely upload massive volumes of data to ProKnow's cloud server for storage, distributed contouring, plan evaluation and peer review, and analysis of key metrics - including outcomes technique evaluations and intra- and inter-institutional collaborations.

Additionally, in August 2021, IARC, The Northern Ireland Cancer Registry, and new software to facilitate cancer staging, aiming to improve national cancer control with a more effective collection of comparable data. Furthermore, in October 2020, MOVEMBER launched the world's largest network of prostate cancer patient registries, which will have the power to transform treatment and care of the disease by harnessing the 'real world' experiences of over 130,000 men. Such initiative improves the infrastructure and brings the cost down by providing a more efficient and cost-effective digital solution. Hence, due to the abovementioned factors, the market is expected to grow in the future. However, privacy and security concerns for patient data will be a restraint in the market growth.

Cancer Registry Software Market Trends

Hospital & Medical Practice are Expected to Hold a Significant Market Share Over the Forecast Period

The hospital segment highly contributes to the growth of the studied market since the majority of the hospitals have a well-developed infrastructure. The rising cancer-related procedures are augmenting the demand of hospitals. Patients have been relying on hospitals as primary care centers, which is likely to continue during the forecast period.

In several Central and Eastern European (CEE) countries, healthcare spending as a percentage of GDP has lagged that of wealthier European Union (EU) nations. Some nations, notably Poland and the Czech Republic, now feel political pressure to increase healthcare investment. The EU publication Sifted reported in November 2020 that Europe had 626 actively funded digital health companies, with 63% of them launched in the prior five years. The high number of surgeries in different nations is also propelling the growth of the market. For Instance, The Innovative Partnership For Action Against Cancer article titled "Tackling reimbursement for radiation oncology and cancer surgery: challenges and options" published in October 2020, reported that despite the small size of Denmark's population, the minimum number of cases is among the highest in Europe. In Denmark, more than 100 per year pancreatic surgeries are performed. Such a high number of surgeries depicts the high adoption of surgery among the patients and thus is expected to show growth over time. Hence, increasing surgeries would increase the patient preference for hospitals as it would provide them better care than other facilities due to high investments and funding available to the hospitals.

The availability of cancer registry software in hospitals is another factor in the growth of the market. For instance, in September 2021, the Indian Council of medical research (ICMR) published its report titled "Clinicopathological Profile of Cancers in India: A Report of Hospital-Based Cancer Registries, 2021," which stated that under the NCRP, 13,32,207 cancer cases were registered from 96 hospitals during 2012-19. Out of these, 6,10,084 cases were included for analysis. Thus, the availability of cancer registry software in the hospital provides additional advantages to the patients. Due to these advantages, the cancer registry software market is expected to grow in the upcoming future.

Hence, due to the above-mentioned factors, the market segment is likely to grow in the future.

North America is Expected to Dominate the Market Over the Forecast Period

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The North American region is expected to dominate the market. The increasing prevalence of chronic disorders like cancer and new product launches are expected to drive the market in the region during the forecast period.

According to Cancer Statistics 2021, published in the American Cancer Society Journal, there are an estimated 1.9 million new cancer cases diagnosed and 608,570 cancer deaths in the United States, which will drive the market significantly. moreover, according to Globocan 2020, the number of new cancer cases in the country was 274,364 in 2020, and this number is expected to increase to 400,564 by 2040. Thus, the growing burden of cancer cases in the country is expected to fuel the growth of the market.

Moreover, cancer is one of the most prevalent forms of chronic disease in Mexico, and as per the report of Globocan 2020, about 195,499 people were newly diagnosed with cancer in 2020, and 90,222 died because of it. The most prevalent forms of cancer were breast, prostate, colorectum, thyroid, and cervix uteri cancer. Furthermore, as per the Globocan 2020, the cancer incidence in Mexico is expected to reach 254,665 by 2030 and 323,432 by 2040, and thus, with the increasing burden of cancer cases in the country, the adoption of cancer registry software is expected to surge. Therefore, the studied market is expected to grow over the forecast period of the study.

Similarly, increasing the adoption of cancer registries would also increase the market growth. According to the Centers for Disease Control and Prevention, as of January 2022, over 98% of National Program of Cancer Registries (NPCR) funded cancer registries use at least one Registry Plus product, with more than half of those using two or more products. Registry Plus products have become a common platform among many cancer registries, helping them meet NPCR's standards for electronic data exchange, and streamlining and automating registry operations. Such an adoption rate would increase market growth in the upcoming future.

Cancer Registry Software Market Competitor Analysis

Most of the players are based in developing countries due to more technological advancements. But due to the ease of connectivity in modern times, these players have also penetrated developing countries and are trying to establish a market in these countries as well. The market is partially fragmented and consists of several major players. Some of the companies which are currently dominating the market are C/NET Solutions, Elekta, McKesson Corporation, IBM Corporation, and Siemens Healthineers, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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