Next-Generation Cancer Diagnostics: Technologies and Global Markets

Market Research Report | 2023-05-03 | 166 pages | BCC Research

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Report description:

Description

Report Scope:

This research report analyzes leading next-generation diagnostic technologies, including next generation sequencing (NGS), polymerase chain reaction (PCR), multiplex conventional, cell or extracellular vesicle capture, and arrays/microfluidics. The report also discusses various liquid biopsy platforms and how these compare with tissue-based testing.

The report discusses several significant, large-scale research initiatives contributing to cancer diagnostic development. Key forces driving the market are discussed.

An in-depth analysis of key companies operating in the next-generation cancer diagnostic and technologies market is also included. The information also focuses on companies involved in developing products and emerging technologies.

The market for next-generation cancer diagnostics is analyzed in depth. The market is analyzed by cancer site (bladder, brain, breast, colorectal, cancer of unknown primary, gastric, gynecologic, hematologic, kidney, liver, lung, pan-cancer, pancreatic, prostate, melanoma, and thyroid), by test purpose (screening/early detection, diagnosis, monitoring, therapy guidance), by test platform (arrays/microfluidics, cell/EV capture, multiplex conventional, PCR and NGS) and by geography (North America, Europe, Asia-Pacific, and Rest of World).

The base year for market data is 2021, with historical data provided for 2020 and 2019 and forecast data provided through 2027. Historical, base year, and forecast data are provided for each market segment of the report.

Report Includes:

- 15 data tables and 80 additional tables
- An overview of the global market and technologies for next generation cancer diagnostics
- Estimation of the market size and analyses of global market trends, with data from 2021, estimates for 2022 and projections of compound annual growth rates (CAGRs) through 2027
- Highlights of the current and future market potential and quantification of next generation cancer diagnostics market based on type, application, and region
- Description of arrays and microfluidics (LOAC) technologies, multiplex conventional technologies, next generation sequencing technology and polymerase chain reaction (PCR) technology
- Analysis of underlying technological, environmental, legal/regulatory, and political trends that may influence the size and nature of the market
- Coverage of the key initiatives and programs related to the next generation cancer diagnostics market
- Market share analysis of the key companies of the industry and coverage of their proprietary technologies, strategic alliances, and other key market strategies
- Company profiles of major players within the industry, including Abbott Laboratories, Illumina Inc., Becton, Dickinson and Co., and Illumina Inc.

Executive Summary

Summary:

An increasing number of cancer cases globally is one of the significant factors contributing to industry growth during the forecast period. Technological advancements in diagnostic tests are further expected to fuel industry growth. Moreover, supportive government initiatives and rising awareness are additional factors anticipated to boost growth during the forecast period. For instance, the Biden-Harris administration has set a goal of decreasing the cancer mortality rate by 50% over the next 25 years and enhancing the knowledge surrounding people living with and surviving tumors.

Cancer is one of the leading causes of death worldwide, and the prevalence of the disease has been escalating at an alarming rate. Therefore, healthcare professionals are focusing on developing effective screening and treatment solutions to check prevalence levels. Early screening increases the success rate of treatment regimens. As a result, healthcare agencies and market players, through various awareness programs, are promoting routine check-ups and screenings. For instance, in March 2022, HHS announced funding of $5 million to improve equity in cancer screening at health centers.

The global oncology burden is projected to reach 28.4 million cases in 2040, a 47% growth from 2020. Thus, a rise in the incidence is anticipated to boost the adoption of cancer diagnostic products. In April 2022, the Precision Cancer Consortium (PCC) collaborated with pharmaceutical companies by permitting access to comprehensive testing for all cancer patients globally. The PCC drives diverse initiatives to grow patient access to precision diagnostics using wide-ranging genomic testing, including next generation sequencing (NGS). The founding members of PCC include Novartis, Bayer, Roche, and GlaxoSmithKline.

Advanced diagnostics for cancer represent a significant market opportunity for life sciences companies. Many cancer types are on the rise as the aging populations of many countries continue to grow. As a result, there is an increasing demand for noninvasive diagnostic assays that can detect cancers earlier, molecularly subtype tumors to guide therapy decisions and monitor cancer recurrence in treated individuals.

Cancer remains the second leading cause of death worldwide despite advances in treatment. Cancer takes a tremendous toll on patients, families, and society. One pressing need in cancer diagnostics is earlier-stage identification, identifying cancer before it has spread to other body parts. Several companies are using advanced diagnostic platforms to develop and validate assays that

detect cancer earlier to meet this need. Sanomics, Prenetics, Guardant, Thrive Earlier Detection, AnPac BioMedical, and Grail are notable examples.

A second pressing need in cancer is a more accurate classification of suspicious lesions or nodules (malignant or benign). Correct type leads to better treatment decisions and fewer unnecessary, invasive biopsies. In the case of lung cancer, peripheral lung nodules are very difficult to biopsy, deep within the small branches of the lung, often beyond the reach of the bronchoscope. Needle biopsy is problematic, carrying the risk of lung collapse and infection. New, non-invasive blood-based tests are needed to assess nodules.

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