

APAC Ovarian Cancer Diagnostics & Therapeutics Size - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Asia-Pacific ovarian cancer diagnostics and therapeutics market is expected to register a CAGR of 15.1% during the forecast period.

Key Highlights

-The COVID-19 pandemic significantly impacted the market studied. A cancer diagnosis had been delayed as screening programs and diagnostic services were reduced or halted in Asia-Pacific countries due to the fear of acquiring COVID-19 infection. In February 2021, a research study published in the Journal of Ovarian Research stated that the COVID-19 pandemic imposed excessive burdens on the healthcare system, leading to treatment cancellations and delayed surgeries. In light of the pandemic condition, the management strategy for ovarian cancer patients was modified and created by the pathological type, tumor stage, and the present stage of treatment. Hence, this led to a slight decline in the market during the early phases of the pandemic. Therefore, the market was impacted negatively during the pandemic. Still, it is expected to see a surge post-pandemic. It is anticipated to reach the pre-pandemic levels by the end of 2023 due to the increased adoption of surgeries that were postponed during the pandemic phase.

-Factors such as the increasing incidence of ovarian cancer, the increasing population of aged women, and the increase in healthcare expenditure in developing countries are expected to increase market growth. For instance, According to the Government of Australia 2022, it is estimated that 1,815 new cases of ovarian cancer (including serious carcinomas of the fallopian tube) have been diagnosed in Australia in 2022. Furthermore, according to the news in February 2021, Ovarian cancer incidence in India is between 5.4 and 8 per 100,000 people. Such a huge incidence of ovarian cancers in Asian countries is expected to drive market growth due to increased adoption of diagnosis and treatment.

-The rising initiatives from the cancer institutes, such as partnerships, are anticipated to drive market growth. For Instance, In July 2021, the Cancer Institute and the Indian Institute of Technology-Madras entered into a partnership to develop a kit for the early

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diagnosis of ovarian cancer. The aim is to develop a cost-effective, point-of-care device that will use only a blood sample and can be deployed for outpatient diagnosis.

-With funds from the Department of Science and Technology, the institute studied 138 ovarian cancer patients, 20 patients with benign ovarian cancers, and 238 healthy patients as the control group. The study used high-end proteomics to identify proteins that were expressed differentially in the epithelial ovarian cancers that account for over 90% of all ovarian cancers. Hence, such collaborations will increase market growth in the upcoming future.

-Initiatives by the government are another factor in market growth. For instance, in August 2021, the non-profit organization Cancer Research Malaysia (CRM) showed the feasibility of mainstreaming or implementing genetic testing and genetic counseling for improved diagnosis and treatment of ovarian cancer. This makes Malaysia one of the first countries in Asia to have access to genetic testing for faulty breast cancer susceptibility (BRCA) genes responsible for the devastating disease. Hence, the abovementioned factors are expected to increase the market share.

-Therefore, factors such as the rising incidence of ovarian cancers, rising initiatives from the key market players, and increased initiatives from the government are expected to drive the market growth. However, the lack of skilled professionals in the region is likely to hinder market growth.

APAC Ovarian Cancer Diagnostics & Therapeutics Market Trends

Positron Emission Tomography is Expected to Hold a Significant Market Share Over the Forecast Period

- The rise in demand for positron emission tomography (PET) analysis in the diagnosis of ovarian cancer and the rising initiatives from the key market players are the factors responsible for driving the growth of the segment.

- According to the study published in Quantitative Imaging in Medicine and Surgery in March 2021 in China, PET/CT (computed tomography) scans accurately predicted peritoneal metastases with high sensitivity (84.2%), specificity (87.0%), and accuracy (85.1%) in advanced ovarian cancer before surgery. Such studies show the importance of PET scanning for ovarian cancer, thereby leading to increased adoption and driving segment growth.

- The huge investments by universities for the procurement of PET scanners are one of the factors driving the market growth. For instance, in March 2021, a USD 15 million project was proposed by the University of Sydney in a joint venture with the Northern Sydney Local Health District to procure a total-body PET scanner in Australia. This TB-PET scanner project will revolutionize Australia's biomedical imaging capabilities, deliver improved patient outcomes, and boost medical and health science research programs, driving market growth.

- Many radioisotopes and nuclear imaging equipment manufacturers are developing advanced technology for PET imaging for cancer and other diseases, also boosting the studied market. For instance, in May 2021, United Imaging, a China-based company involved in medical imaging and radiotherapy equipment, launched its uExcel Technology Platform for PET/CT at the China International Medical Equipment Fair (CMEF). Therefore, the rising innovative technologies in PET scanning help in the increased adoption of these scanners for ovarian cancer, driving the market growth.

- Hence, factors such as rising initiatives from key market players, such as investments and launches, are responsible for driving the growth of the market studied in the forecast period.

China is Expected to Hold a Healthy Share in the Market Over the Forecast Period

- The major factors fueling the market growth in the country are the increasing burden of ovarian cancer disorder, the growing focus on research and development of effective cancer therapies, and the rising number of product approvals, along with increasing investment.

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- The rising incidence of ovarian cancers in the country is anticipated to drive market growth. For instance, in March 2021, a research study published in BMC Women's Health stated that the incidence and mortality of ovarian cancer have shown a fast-increasing trend in China. Hence, increasing ovarian cancer will increase the demand for diagnostics and therapeutics, which will increase the market growth in the region.
- Also, the research and developments accompanied by drug approvals in China are expected to drive market growth in the country due to the increased availability of ovarian cancer therapeutics. For instance, in May 2021, BeiGene, Ltd. received conditional approval from the China National Medical Products Administration (NMPA) for the treatment of patients with germline BRCA (gBRCA) mutation-associated recurrent advanced ovarian, fallopian tube, or primary peritoneal cancer. Furthermore, in May 2022, Zai Lab Limited presented the analysis of the Phase III PRIME study exploring the efficacy of niraparib maintenance therapy for patients in China with advanced ovarian cancer based on their response to first-line platinum-based chemotherapy.
- Hence, the abovementioned factors, such as the increasing incidence of ovarian cancers and rising approvals of ovarian cancer drugs in China, are expected to increase market growth in the region.

APAC Ovarian Cancer Diagnostics & Therapeutics Industry Overview

The market for Asia-Pacific ovarian cancer diagnostics and therapeutics market is highly competitive due to the presence of a huge number of market players. The factors owing to the competition include rising product launches and rising partnerships in the development of ovarian cancer therapeutics, among others. Some of the companies that are currently dominating the market are AstraZeneca, Bristol-Myers Squibb Company, Eli Lilly and Company, F. Hoffmann-La Roche Ltd, and GlaxoSmithKline Plc, among others.

Additional Benefits:

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

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