

Global HPV Testing and Pap Test - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global HPV Testing and Pap Test Market size is estimated at USD 6.21 billion in 2024, and is expected to reach USD 10.33 billion by 2029, growing at a CAGR of 10.70% during the forecast period (2024-2029).

The COVID-19 pandemic had a significant impact on the market. Many countries were in lockdown and suspended trade with other countries, leading to a decline in healthcare services, including the diagnosis of various diseases. In 2020, with the rising COVID-19 pandemic globally, various elective medical procedures, including cancer screening, were found to be largely put on hold to prioritize other urgent needs and reduce the risk of the spread of COVID-19. This has shown a substantial decline in cancer screening. However, cancer care and maintaining high standards of diagnosis and treatment have been the major priorities of the national healthcare bodies and international healthcare systems worldwide.

The driving factors of the market are the increasing number of cervical cancer cases across the globe, an increasing number of cervical cancer screening programs, and the introduction of advanced technologies.

According to the World Health Organization (WHO), in 2020, more than half a million women contracted cervical cancer, and about 342,000 women died as a result. WHO's global strategy for cervical cancer elimination, endorsed by the World Health Assembly in 2020, calls for 70% of women globally to be screened regularly for cervical disease with a high-performance test, and for 90% of those needing it to receive appropriate treatment, that may

Additionally, according to the American Cancer Society 2022 estimates about 14,110 new cases of invasive cervical cancer were diagnosed in the United States. Thus, globally, the increasing number of cervical cancer cases may increase the demand for HPV testing and PAP tests, driving the growth of the market.

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The growing number of cervical cancer cases increases the demand for screening programs. The tests are found to address deficiencies in traditional cervical screening that has led to alternative screening paradigms such as those involving detection of the human papillomavirus (HPV). Companies like Qiagen NV are having technologically advanced tests that detect HPV DNA such as Capture 2 test, which detects the presence of 13 high-risk HPV types in the cervical sample. Hence, all these factors have impacted the overall market growth.

HPV Testing and PAP Test Market Trends

The Cervical Cancer Screening Test Segment is Expected to be Dominant Over the Forecast Period

Cervical cancer screening is an essential part of a woman's routine healthcare. For women of age 30 years and above, an HPV test is recommended for detection. The screening helps identify precancerous lesions caused by HPV so they can be removed to prevent invasive cancers from developing.

With the rising COVID-19 burden, cervical cancer procedures and screening were found to be paused in 2020 and only the urgent procedures were being performed, which impacted the overall market growth. The cancer diagnosis was found to be delayed as screening and diagnostic services were reduced or suspended in many countries, but post-pandemic, the situation is expected to be better with the services being resumed, resulting in positive growth.

The major factor driving the growth of the segment includes the rising burden of cervical cancer across the world. The disease is more commonly found in females. According to the World Health Organization, more than 270,000 women die every year due to cervical cancer.

According to the American Society of Clinical Oncology, in 2022, an estimated 14,100 women in the United States will be diagnosed with invasive cervical cancer and globally around 604,127 women were diagnosed with cervical cancer in 2020. In most cases, cervical cancer can be prevented through early detection and treatment of abnormal cell changes that occur in the cervix before cervical cancer develops. Therefore, with the increasing adoption of early diagnosis, the market is expected to grow positively during the forecast period.

The cervical cancer screening tests segment is found dominating the market owing to the increasing awareness about the benefits associated with the early detection of cancer and the rising government support toward controlling cervical cancer. Hence, all these factors are expected to drive the market growth.

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

The market in the North American region has been found to dominate due to the increased number of cervical cancer cases and the growing number of screening procedures.

With the rising COVID-19 burden, HPV testing and Pap testing were found to be paused, which majorly impacted the overall market growth. There has been a dramatic impact on cervical cancer screening, as health systems will re-open primary care appointments and resume preventive care visits, the clinic-based cervical cancer screening procedures may also gradually increase.

Cervical cancer is found to be one of the most common causes of death among women in the United States. According to the American Cancer Society, 2022 estimates about 4,280 women died from cervical cancer in the United States. The death rate due to cervical cancer has dropped over the last 40 years, by up to more than 50%, with the increased use of testing.

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There is no FDA-approved HPV test for men currently, but there are only approved tests to find HPV in a woman's cervix. The rising number of cervical cancer cases has boosted the demand in the diagnostic HPV testing and Pap testing market.

There is one HPV test that has been recently approved (Cobas test) for use as primary cervical cancer screening for women aged 25 years and older, followed by a Pap test for women with certain results. There are also many new tests in development that can improve the evaluation of HPV-positive women. Thus, due to the increasing demand for Pap, HPV, and other tests for cancer screening, the market is expected to grow.

Additionally, favorable government policies in North America are expected to drive the overall market during the forecast period. In the United States, the National Breast and Cervical Cancer Early Detection Program (NBCCEDP) for breast and cervical cancer screening has helped in driving the overall market growth.

HPV Testing and PAP Test Industry Overview

Some of the major players in the HPV test and Pap test market include Abbott Laboratories, Qiagen, Becton, Dickinson and Company, F. Hoffmann-La Roche Ltd, and many others. These key players are found focusing on inorganic and organic strategies such as product approvals and licenses, agreements, collaborations, partnerships, expansions, and acquisitions to sustain their growth in the HPV testing and Pap test market. Also, receiving approvals from regulatory authorities for new product launches will render the companies with a competitive advantage.

Additional Benefits:

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

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