

Human Papillomavirus (HPV) Testing Market - Global Outlook and Forecast 2020-2025

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Abstracts

The global HPV testing market is expected to grow at a CAGR of over 12% during the period 2019–2025.

The following factors are likely to contribute to the growth of the HPV testing market during the forecast period:

Increasing Prevalence of HPV Infections

Emergence of Point-of-care Diagnostics/Rapid HPV Tests

Rise of mRNA Test for Cervical Cancer Screening

Increasing Demand for HPV Co-testing

The increased procurement of the latest-generation HPV testing analyzers and test kits, coupled with the high prevalence of HPV-related infections and cancers, especially cervical and vaginal, influences the growth of the global HPV testing market.

Traditionally, cervical cancer screening was based on cervical cytology. However, in recent years, several countries and global health bodies have recommended the inclusion of HPV tests for cervical and pre-cancer screening programs, which is likely to boost the market.

The demand for new innovative testing consumables and instruments using advanced techniques such as the HPV mRNA test, which promotes accurate and sensitive diagnostic outcomes, is driving the market growth. Further, with the availability of

positive clinical evidence, demonstrating the superiority of the latest generation advanced testing devices, end-users will become increasingly aware of clinical benefits and rapidly adopt these tests as an essential screening tool for cervical cancer screening. Therefore, the improvement in patient management, favorable government initiatives for primary screening, and the rising awareness of advanced testing in developed and developing economies are increasing the adoption globally.

The study considers the present scenario of the HPV testing market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

HPV Testing Market: Segmentation

This research report includes detailed segmentation by products, applications, end-user, and geography. The consumables segment is growing due to the high adoption of advanced testing kits, reagents, and other related consumables to detect and screen cervical cancers globally. The segment is also growing at a fast rate due to the recurring purchase by end-users to perform HPV tests. These screening tests are likely to gain wide acceptance in emerging economies due to favorable government initiatives and the rise in consumer spending power. Therefore, market players are focusing on significant product launches in a low resource setting of emerging countries, thereby accelerating the segment growth. The instruments segment is growing at a slow pace as the procurement of analyzers is capital intensive and the purchasing decision depends on financial resources and budget allocations. However, the increasing availability of automated and compact analyzers/instruments has significantly improved the efficiency and quality of end-user operations. Automation and integration of several diagnostic platforms have led to the introduction of innovative diagnostic analyzers, thereby driving the growth during the forecast period.

The cervical application segment is growing on account of the rise in cervical cancer incidences. The increased focus of market players to launch screening products in low resource countries is expected to drive the cervical application segment during the upcoming years. HPV self-sampling is emerging with the rapid availability of these devices as a potential screening strategy, especially in the US, which is likely to contribute to the growth.

The application of HPV testing for vaginal cancer offers powerful negative predictive

values. Therefore, the detection of infection with a high-risk HPV, which produce visible signs, is a powerful tool for vaginal cancer screening. Owing to the benefit of HPV testing, coupled with the rise in the vaginal cancer burden globally, vendors are offering innovative testing devices, which are driving the growth of the vaginal application segment.

The increased focus on enhancing the sensitivity of cervical screening to reduce false-negative diagnoses as well as improve the specificity of molecular tests to detect high-risk human papillomavirus is a major factor contributing to the growth of standard reference laboratories. The availability of standard reference laboratory services for the evaluation of HPV DNA and antibody detection in biological specimens through capacity-building worldwide is another reason for the growth of standard reference laboratories.

Healthcare professionals in hospitals use human papillomavirus testing as a screening procedure for the cervical and other related cancers. The market is likely to grow at a fast pace during the forecast period on account of the adoption of advanced testing products. A majority of patients with high-risk symptoms prefer visiting hospitals for diagnosis due to advanced infrastructure facilities available in major private and public hospitals.

The physicians' office and clinic segment is expected to grow mainly on account of the growing prevalence of cervical cancers worldwide. These clinics perform laboratory screening through private offices for people with a high risk of cervical and other HPV associated cancers at an affordable cost. Another factor responsible for the rise of this segment is the availability of super-specialty expertise in these clinics.

Market Segmentation by Products

Consumables

Instruments

Market Segmentation by Applications

Cervical Cancers

Vaginal Cancers

Others

Market Segmentation by End-user

Standard Reference Laboratories

Hospitals

Physicians' Office and Clinics

Insights by Geography

North America is growing at a significant rate due to the growing preference for HPV tests to detect and screen cervical cancers and other related infections. The presence of a large pool of population with a high risk of developing cervical cancer, the increasing acceptance of HPV testing, and growing awareness of advanced testing procedures have accelerated the market.

Germany, France, the UK, Spain, and Italy are the leading contributors to the Europe market. The presence of highly sophisticated healthcare infrastructure, a high awareness level of advanced HPV screening procedures with high analytic sensitivity for detecting cervical cancers, and increased investment in R&D activities are the major drivers for the growth in the region.

The region has the largest population density and the highest population with a high risk of developing cervical cancers and other associated infections. Japan, China, Australia, South Korea, and India are the major revenue contributors from the region. Japan is the major revenue contributor to the HPV testing market in APAC due to advancements in healthcare infrastructure, the rise in healthcare expenditure, and favorable public and private initiatives for an increase in the healthcare access.

Market Segmentation by Geography

North America

US

Canada

Europe

Germany

France

UK

Spain

Italy

APAC

Japan

China

India

South Korea

Australia

Latin America

Brazil

Mexico

Argentina

MEA

Turkey

South Africa

Saudi Arabia

Insights by Vendors

The global HPV testing market is highly competitive and characterized by the presence of several global, regional, and local players. F. Hoffmann-La Roche, QIAGEN, Hologic, and Abbott are the dominant players, and their testing instruments and consumables are widely used by end-users globally. These companies have a wide geographic footprint, diversified product portfolio, and a strong focus on innovation and research activities. Over the years, these players have been dominating the market as they have introduced safe and efficient products in the market. Vendors, especially global players, are increasingly focusing on pursuing inorganic growth strategies such as acquisitions and strategic partnerships to expand their presence, enhance product portfolio, and improve expertise in the market.

Key Vendors

Hoffmann-La Roche

QIAGEN

Hologic

Abbott

Other Vendors

Arbor Vita

BD

Cepheid

DAAN Gene

DiaCarta

Fujirebio

Greiner Bio One International

HybriBio

IncellDx

Norgen Biotek

PreTect

Seegene

Siemens Healthineers

Takara Bio

Xiamen Zeesan Biotech

ZYTOVISION

Key Market Insights

The analysis of the global HPV testing market provides sizing and growth opportunities for the forecast period 2020–2025.

Offers sizing and growth prospects of the market for the forecast period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the

market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.

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