

Europe Molecular Oncology Diagnostics Market: Focus on Cancer Type, End User, and Country - Analysis and Forecast, 2024-2033

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Abstracts

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Introduction to Europe Molecular Oncology Diagnostics Market

The Europe molecular oncology diagnostics market was valued at \$606.0 million in 2024, and the market is expected to grow with a CAGR of 10.78% and reach \$1,523.4 million by 2033. Next-generation sequencing (NGS), digital PCR, and liquid biopsy are just a few of the technological advancements driving the European molecular oncology diagnostics market's expansion. The region's rising cancer incidence is another factor. Better patient outcomes, more accurate treatment choices, and earlier detection are made possible by these advancements.

However, there are a number of regional obstacles to market penetration. The high expense of molecular diagnostic testing remains a hurdle, especially in nations with relatively limited healthcare budgets in Central and Eastern Europe. Furthermore, wider clinical usage is constrained by a lack of qualified personnel who can operate sophisticated diagnostic tools and decipher complicated genomic data.

The European market continues to grow in spite of these challenges. The integration of molecular tools into routine oncology care is being supported and innovation is being accelerated by cooperative efforts involving biotech companies, pharmaceutical companies, diagnostic producers, and academic research centres. Unlocking the full potential of molecular diagnostics in cancer management across various European healthcare systems would require efforts to standardise payment regulations, lower test prices, and increase clinician genomic literacy.

Market Introduction

The market for molecular oncology diagnostics in Europe is changing dramatically as more healthcare systems embrace precision medicine methods for treating cancer. Molecular diagnostics is becoming more and more important in detecting genetic changes connected to different types of cancer, driven by the demand for earlier detection, more precise diagnosis, and customised therapy planning. Advanced testing systems that support targeted therapies and enhance treatment outcomes are becoming more and more in demand in the region.

Adoption is accelerating in Western Europe, especially in nations like Germany, the UK, and France, because to established healthcare systems, benevolent legal environments, and rising genomic research expenditures. Central and Eastern Europe is progressively catching up, though, as initiatives are being made to standardise cancer treatment internationally and increase access to molecular diagnostics.

The market is also benefiting from the continuous integration of digital health, as oncology centres and labs use genetic data platforms to make decisions in real time. Demand in the market is also being driven by growing applications in risk stratification, treatment monitoring, and early diagnosis as well as rising awareness among physicians and patients. Europe is positioned to become a major centre for molecular oncology diagnostics, influencing the direction of customised cancer treatment in a variety of clinical settings as long as public and private health authorities keep funding innovation and capacity-building.

Market Segmentation:

Segmentation 1: by Cancer Type

Solid Tumors

Hematologic Malignancies

Segmentation 2: by End User

Hospitals and Diagnostic Centers

Reference Laboratories

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

Segmentation 3: by Region

Europe - U.K., Germany, France, Italy, Spain, and Rest-of-Europe

Europe Molecular Oncology Diagnostics Market Trends, Drivers & Challenges:

Market Trends

Expansion of Next-Generation Sequencing (NGS) Panels: Increasing use of multiplexed NGS assays for simultaneous detection of multiple oncogenic mutations, enabling broader genomic profiling.

Growth of Liquid Biopsy Adoption: Rising preference for minimally invasive circulating tumor DNA (ctDNA) and circulating tumor cell (CTC) assays to monitor treatment response and detect early relapse.

Integration with Immuno-Oncology: Molecular diagnostics platforms increasingly incorporate biomarkers (e.g., PD-L1, TMB) to guide immune checkpoint inhibitor therapies.

Emergence of Companion Diagnostics: Co-development of targeted therapies and associated diagnostic tests is accelerating regulatory approvals and market uptake.

Market Drivers

Rising Cancer Incidence & Aging Population: Europe's growing elderly demographic and higher cancer prevalence boost demand for precise diagnostic tools.

Shift Toward Precision Medicine: Clinicians and payers favor personalized treatment plans, driving investment in molecular assays that predict therapy efficacy.

Favorable Reimbursement Policies: Several European healthcare systems and HTA agencies are approving broader coverage for advanced genomic tests, reducing out-of-pocket costs.

Technological Advancements & Cost Reductions: Continuous improvements in assay sensitivity, turnaround time, and economies of scale are making molecular tests more accessible.

Market Challenges

High Test Development & Implementation Costs: Building validated panels and obtaining regulatory clearances remain expensive, limiting adoption in smaller hospitals.

Fragmented Reimbursement Landscape: Inconsistent coverage policies across EU member states and varied HTA requirements create uncertainty for providers and manufacturers.

Standardization & Quality Control Issues: Lack of uniform guidelines for assay validation, interpretation, and reporting can hamper cross-laboratory comparability.

Data Privacy & Regulatory Complexity: Strict GDPR requirements and evolving IVDR regulations increase administrative burden and slow down clinical deployment.

Some of the prominent key players in this market are:

Biocartis Group NV

bioMérieux

F. Hoffmann-La Roche Ltd

QIAGEN N.V.

Contents

Executive Summary
Scope and Definition

1 EUROPE MOLECULAR ONCOLOGY DIAGNOSTICS MARKET: INDUSTRY OUTLOOK

- 1.1 Global Incidence and Prevalence of Cancer (by Cancer Type)
 - 1.1.1 Europe
- 1.2 Trends: Current and Future Impact Assessment
 - 1.2.1 Increasing Partnerships among Players
 - 1.2.2 Increasing Launch of Innovative Products and Regulatory Approvals in Molecular Oncology Diagnostics Ecosystem
- 1.3 Regulatory Landscape
 - 1.3.1 Legal Requirements and Framework in Europe
- 1.4 Impact of COVID-19 on the Molecular Oncology Diagnostics Market
- 1.5 Liquid Biopsy-Based Cancer Molecular Diagnostics
- 1.6 Laboratory-Developed Test (LDT) vs. In-Vitro Diagnostics (IVD)
- 1.7 Role of Companion Diagnostics in the Molecular Oncology Diagnostics Market
- 1.8 Market Dynamics
 - 1.8.1 Market Drivers
 - 1.8.1.1 Rising Incidence of Cancer Cases
 - 1.8.1.2 Rising Technological Advancements in Molecular Diagnostics
 - 1.8.1.3 Growth in Biomarker Identification and Transformations in Molecular Techniques
 - 1.8.1.4 Growing Demand for Personalized Medicine
 - 1.8.2 Market Challenges
 - 1.8.2.1 Lack of Qualified Professionals
 - 1.8.2.2 High Cost of Molecular Diagnostic Kits and Assays Hindering the Adoption Rate
 - 1.8.3 Market Opportunities
 - 1.8.3.1 Focus on Reimbursement and Medical Coverage for Molecular Oncology Diagnostics
 - 1.8.3.2 Focus on Next-Generation Ultrasensitive Molecular Diagnostics
 - 1.8.3.3 Increasing Growth Opportunities for Molecular Diagnostics Companies in Emerging Economies

2 MOLECULAR ONCOLOGY DIAGNOSTICS MARKET: BY REGION

Europe Molecular Oncology Diagnostics Market: Focus on Cancer Type, End User, and Country - Analysis and Forec...

- 2.1 Regional Summary
- 2.2 Drivers and Restraints
- 2.3 Europe
 - 2.3.1 Regional Overview
 - 2.3.2 Driving Factors for Market Growth
 - 2.3.3 Factors Challenging the Market
 - 2.3.4 By Cancer Type
 - 2.3.5 By End User
 - 2.3.6 Germany
 - 2.3.6.1 By Cancer Type
 - 2.3.6.2 By End User
 - 2.3.7 France
 - 2.3.7.1 By Cancer Type
 - 2.3.7.2 By End User
 - 2.3.8 U.K.
 - 2.3.8.1 By Cancer Type
 - 2.3.8.2 By End User
 - 2.3.9 Italy
 - 2.3.9.1 By Cancer Type
 - 2.3.9.2 By End User
 - 2.3.10 Spain
 - 2.3.10.1 By Cancer Type
 - 2.3.10.2 By End User
 - 2.3.11 Rest-of-Europe
 - 2.3.11.1 By Cancer Type
 - 2.3.11.2 By End User

3 MOLECULAR ONCOLOGY DIAGNOSTICS MARKET - COMPETITIVE BENCHMARKING & COMPANY PROFILES

- 3.1 Key Strategic Development
 - 3.1.1 Partnerships, Alliances, and Business Expansions
 - 3.1.2 New Offerings
 - 3.1.3 Mergers and Acquisitions
 - 3.1.4 Regulatory and Legal Activities
- 3.2 Company Share Analysis
- 3.3 Company Profiles
 - 3.3.1 Biocartis Group NV

- 3.3.1.1 Overview
- 3.3.1.2 Top Products
- 3.3.1.3 Top Competitors
- 3.3.1.4 Target Customers/End User
- 3.3.1.5 Key Personnel
- 3.3.1.6 Analyst View
- 3.3.2 bioMérieux
 - 3.3.2.1 Overview
 - 3.3.2.2 Top Products
 - 3.3.2.3 Top Competitors
 - 3.3.2.4 Target Customers/End User
 - 3.3.2.5 Key Personnel
 - 3.3.2.6 Analyst View
- 3.3.3 F. Hoffmann-La Roche Ltd.
 - 3.3.3.1 Overview
 - 3.3.3.2 Top Products
 - 3.3.3.3 Top Competitors
 - 3.3.3.4 Target Customers/End User
 - 3.3.3.5 Key Personnel
 - 3.3.3.6 Analyst View
- 3.3.4 QIAGEN N.V.
 - 3.3.4.1 Overview
 - 3.3.4.2 Top Products
 - 3.3.4.3 Top Competitors
 - 3.3.4.4 Target Customers/End User
 - 3.3.4.5 Key Personnel
 - 3.3.4.6 Analyst View

4 RESEARCH METHODOLOGY

- 4.1 Data Sources
 - 4.1.1 Primary Data Sources
 - 4.1.2 Secondary Data Sources
 - 4.1.3 Data Triangulation
- 4.2 Market Estimation and Forecast

List Of Figures

LIST OF FIGURES

Figure 1 Europe Molecular Oncology Diagnostics Market, \$Million, 2024, 2028, and 2033

Figure 2 Molecular Oncology Diagnostics Market (by Region), \$Million, 2023, 2027, and 2033

Figure 3 Europe Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023, 2027, and 2033

Figure 4 Europe Molecular Oncology Diagnostics Market (by End User), \$Million, 2023, 2027, and 2033

Figure 5 Role of Diagnostics in Healthcare

Figure 6 Cancer Prevalence and Incidence (by Cancer Type), in Million, Europe, 2022

Figure 7 Europe In-Vitro Diagnostic Devices Regulation Regulatory Process

Figure 8 Technological Advances in Liquid Biopsy Analysis

Figure 9 List of Some Liquid Biopsy-Based Available Tests Approved by FDA/CE-IVD

Figure 10 Prominent FDA-Approved Companion Diagnostics

Figure 11 Impact Analysis of Market Navigating Factors, 2022-2033

Figure 12 Global Distribution of Cases and Deaths (by Cancer Type), 2022

Figure 13 Global Incidence for Cancer Types, 2018-2022

Figure 14 Germany Molecular Oncology Diagnostics Market, \$Million, 2023-2033

Figure 15 France Molecular Oncology Diagnostics Market, \$Million, 2023-2033

Figure 16 U.K. Molecular Oncology Diagnostics Market, \$Million, 2023-2033

Figure 17 Italy Molecular Oncology Diagnostics Market, \$Million, 2023-2033

Figure 18 Spain Molecular Oncology Diagnostics Market, \$Million, 2023-2033

Figure 19 Rest-of-Europe Molecular Oncology Diagnostics Market, \$Million, 2023-2033

Figure 20 Partnerships, Alliances, and Business Expansions, January 2021-July 2024

Figure 21 New Offerings, January 2021-July 2024

Figure 22 Mergers and Acquisitions, January 2021-July 2024

Figure 23 Regulatory and Legal Activities, January 2021-July 2024

Figure 24 Data Triangulation

Figure 25 Top-Down and Bottom-Up Approach

Figure 26 Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1: Market Snapshot

Table 2: Key Trends, Impact Analysis

Table 3: Molecular Oncology Diagnostics Market, Partnerships and Collaborations

Table 4: Molecular Oncology Diagnostics Market, Product Launches and Regulatory Approvals

Table 5: Molecular Oncology Diagnostics Market, New Offerings

Table 6: Biomarkers for Different Cancer Types

Table 7: Significance of Different Biomarkers in Clinical Outcomes of Various Cancer

Table 8: Cost of Liquid Biopsy-Based NGS Kits

Table 9: Europe Molecular Oncology Diagnostics Market, Reimbursement and Medical Coverage

Table 10: Molecular Oncology Diagnostics Market (by Region), \$Million, 2023-2033

Table 11: Europe Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 12: Europe Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 13: Europe Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 14: Europe Molecular Oncology Diagnostics Market (by End User), \$Million, 2023-2033

Table 15: Germany Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 16: Germany Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 17: Germany Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 18: Germany Molecular Oncology Diagnostics Market (by End User), \$Million, 2023-2033

Table 19: France Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 20: France Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 21: France Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 22: France Molecular Oncology Diagnostics Market (by End User), \$Million,

2023-2033

Table 23: U.K. Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 24: U.K. Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 25: U.K. Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 26: U.K. Molecular Oncology Diagnostics Market (by End User), \$Million, 2023-2033

Table 27: Italy Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 28: Italy Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 29: Italy Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 30: Italy Molecular Oncology Diagnostics Market (by End User), \$Million, 2023-2033

Table 31: Spain Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 32: Spain Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 33: Spain Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 34: Spain Molecular Oncology Diagnostics Market (by End User), \$Million, 2023-2033

Table 35: Rest-of-Europe Molecular Oncology Diagnostics Market (by Cancer Type), \$Million, 2023-2033

Table 36: Rest-of-Europe Molecular Oncology Diagnostics Market, Cancer Type (by Solid Tumors), \$Million, 2023-2033

Table 37: Rest-of-Europe Molecular Oncology Diagnostics Market, Cancer Type (by Hematological Malignancies), \$Million, 2023-2033

Table 38: Rest-of-Europe Molecular Oncology Diagnostics Market (by End User), \$Million, 2023-2033

Table 39: Europe Molecular Oncology Diagnostics Market, Company Share Analysis, 2023

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