

# **Global Oncology Companion Diagnostic Market Size Study & Forecast, by Offerings (Instrument, Consumables, Software, Services), by Technology (Polymerase Chain Reaction, Next-Generation Sequencing, Immunohistochemistry, Other Technologies), By Disease Type (Breast Cancer, Non-Small Cell Lung Cancer, Colorectal Cancer, Others), By End-Use, and Regional Analysis, 2023-2030**

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## **Abstracts**

Global Oncology Companion Diagnostic Market is valued at approximately USD 3.1 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 12.9% over the forecast period 2023-2030. An oncology Companion Diagnostic (CDx) is a type of medical test or biomarker that is used to identify specific characteristics or molecular alterations in a patient's tumor. These characteristics are often associated with the patient's likelihood of responding to a particular targeted therapy or treatment for cancer. The primary purpose of oncology companion diagnostics is to aid healthcare providers in making more personalized and effective treatment decisions for cancer patients. The surge in demand for targeted cancer treatment and tailored drugs, growing investments in the pharmaceutical industry, coupled with the rise in approval rate for companion diagnostics are the most prominent factors that are propelling the market demand across the globe.

Additionally, the incidence of cancer is rising worldwide, due to factors such as an aging population and unhealthy lifestyles. This is creating a greater demand for oncology companion diagnostics. According to the World Health Organization, in 2020, it was estimated that nearly 19.3 million new cases of cancer were recorded globally, which is

projected to rise and is likely to reach 30.2 million new cases by 2040. Moreover, the increasing collaborations between diagnostic and pharma entities, as well as the growing investment in research and development activities present various lucrative opportunities over the forecast years. However, the high cost of development and testing and the regulatory challenges are hindering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Oncology Companion Diagnostic Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rising advancements in precision medicine, a growing development of targeted cancer therapies, as well as the growing focus of the pharmaceutical industry on targeted therapies and personalized medicine. Whereas, Asia Pacific is expected to grow at the highest CAGR over the forecast years. The increasing number of government and healthcare industry initiatives promoting precision medicine and genomic research, coupled with ongoing advancements in diagnostic technologies and tools contribute to the development and improvement of companion diagnostics that are significantly propelling the market demand across the region.

Major market players included in this report are:

Agilent Technologies, Inc.

Illumina, Inc.

QIAGEN N.V.

Thermo Fisher Scientific, Inc.

F. Hoffmann-La Roche Ltd.

ARUP Laboratories

Abbott Laboratories

Myriad Genetics, Inc.

bioMérieux SA

Invivoscribe, Inc.

Recent Developments in the Market:

In July 2020, The Ventana HER2 Dual ISH DNA Probe Cocktail assay received approval from the FDA as a revolutionary fast way to identify the HER2 biomarker for breast cancer and as a complementary diagnosis for Herceptin therapy.

In August 2020, The FDA approved the FoundationOne Liquid CDx, a pan-tumor liquid biopsy test, and the Guardant360 CDx assay, an NGS test that employs circulating cell-free DNA as a CDx. Both tests, Guardant360 CDx and FoundationOne Liquid CDx,

serve dual purposes as companion diagnostic tests and for general tumor profiling. A companion diagnostic test provides essential information about the safe and effective use of a corresponding drug, indicating whether a patient's tumor has a genetic change targeted by a specific drug. Notably, Guardant360 CDx is approved as a companion diagnostic for osimertinib (Tagrisso), a lung cancer therapy, while FoundationOne Liquid CDx holds approval for three lung cancer therapies and a prostate cancer therapy. Ongoing clinical studies aim to support additional companion diagnostic labels for both tests.

Global Oncology Companion Diagnostic Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Offerings, Technology, Disease Type, End-use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Offerings:

Instrument

Consumables

Software

Services

By Technology:

Polymerase Chain Reaction (PCR)  
Next-Generation Sequencing (NGS)  
Immunohistochemistry (IHC)  
In Situ Hybridization (ISH)/Fluorescence In Situ Hybridization (FISH)  
Other Technologies

By Disease Type:

Breast Cancer  
Non-Small Cell Lung Cancer  
Colorectal Cancer  
Leukemia  
Melanoma  
Prostate Cancer  
Others

By End-Use:

Hospital  
Pathology/Diagnostic Laboratory  
Academic Medical Center

By Region:

North America  
U.S.  
Canada

Europe  
UK  
Germany  
France  
Spain  
Italy  
ROE

Asia Pacific  
China  
India  
Japan  
Australia

South Korea  
RoAPAC

Latin America  
Brazil  
Mexico

Middle East & Africa  
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South Africa  
Rest of Middle East & Africa

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