

Global Gastric Cancer Diagnostic Market: Analysis By Product Type (Reagents and Consumables and Instruments), By Disease Type (Adenocarcinoma, Gastric Lymphoma and Others), By End User (Hospitals, Oncology Specialty Clinics, Diagnostic Labs, Cancer Research Institutes And Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

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Abstracts

Gastric cancer diagnostic involves a comprehensive process of identifying stomach cancer through clinical evaluation, imaging studies like endoscopy and CT scans, biopsy for tissue examination, and blood tests to detect specific markers. One of the primary objectives driving growth in gastric cancer diagnostics is the emphasis on early detection. Early-stage identification allows for timely intervention and treatment, significantly improving prognosis and treatment outcomes. The global gastric cancer diagnostic market in 2022 stood at US\$1.46 billion, and is likely to reach US\$2.25 billion by 2028.

One of the prominent factors driving the rise in gastric cancer diagnostic's demand include escalating incidence of gastric cancer worldwide and growing awareness among people about gastric cancer prevention. The growing emphasis on preventive healthcare and routine screenings, especially among high-risk populations, is driving the market expansion. Additionally, supportive government initiatives, healthcare infrastructure development, a surge in research and development activities contribute to the market's growth by streamlining diagnostic procedures and improving overall efficiency. Furthermore, the gastric cancer diagnostic market is predicted to grow as the

senior population grows and innovations such as liquid biopsies, advanced technologies like improved imaging techniques and molecular diagnostics and integration of AI with healthcare become popular. The global gastric cancer diagnostic market value is projected to grow at a CAGR of 7.46%, during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Product Type: According to the report, the global gastric cancer diagnostic market is segmented into two segments based on the product type: Reagents & consumables and Instruments. Reagents & consumables segment acquired majority of share in the market in 2022, as consumables are a routine requirement in gastric cancer diagnostics. They are essential for sample preparation, testing, and analysis in various diagnostic techniques, including molecular diagnostics, immunoassays, and histopathological examinations. The continuous need for testing and monitoring, coupled with the prevalence of biopsy procedures and blood-based tests, ensures a sustained demand for consumables. While, instruments segment is the fastest growing segment due to global rise in healthcare infrastructure, especially in developing nations and the increasing accessibility to advanced medical equipment. Innovative instruments contribute to improved diagnostic accuracy, enabling healthcare professionals to identify cancer at earlier stages. Moreover, the integration of artificial intelligence (AI) and automation in diagnostic instruments streamlines the diagnostic process, reducing turnaround times and increasing overall efficiency.

By Disease Type: According to the report, the global gastric cancer diagnostic market is bifurcated into three disease types: Adenocarcinoma, Gastric Lymphoma and Others. Adenocarcinoma segment acquired majority of share in the market in 2022 and is the fastest growing segment as well, as this the most common type of stomach cancer. The growth of the Adenocarcinoma segment is driven by its prevalence as the predominant type of gastric cancer. Future trends in Adenocarcinoma diagnostics may involve the integration of liquid biopsy and personalized medicine approaches. The identification of specific molecular markers may guide targeted therapies, emphasizing a move towards more individualized treatment strategies.

By End User: According to the report, the global gastric cancer diagnostic market is bifurcated into five end users: hospitals, oncology specialty clinics, diagnostic labs, cancer research institutes and others. Hospitals acquired majority of share in the market in 2022 as hospitals serve as key hubs for gastric cancer diagnostics, offering a comprehensive range of services from initial screenings to advanced diagnostic

procedures and subsequent treatment. Specialized medical teams, and the availability of comprehensive facilities contribute to the increasing preference for hospitals as primary centers for gastric cancer diagnostics. Diagnostic Labs segment is expected to grow at the fastest CAGR, due to the increasing demand for laboratory-based diagnostic services. Furthermore, advances in molecular and genetic testing, along with the need for timely and accurate results, the continued integration of cutting-edge technologies, automation, and digital pathology are expected to contribute to the growth of this segment.

By Region: The report provides insight into the gastric cancer diagnostic market based on the geographical operations, namely North America, Asia Pacific, Europe, Latin America and Middle East and Africa. North America gastric cancer diagnostic market enjoyed the highest market share in 2022, primarily owing to reasons such as the high prevalence of gastric cancer and aging population. Lifestyle factors, genetic predispositions, Governments investments in early detection and diagnosis initiatives, while rising R&D spending and government funding for cancer research, increased awareness of early detection and screening programs also contribute to the growth. The US is the world's strongest market for gastric cancer diagnostic because the region has one of the highest healthcare spending rates globally. This substantial investment in healthcare infrastructure has driven the adoption of advanced diagnostic technologies, including gastric cancer diagnosis. The US government is funding programs to improve disease detection and diagnosis. This is also fueling demand for gastric cancer diagnostics, which can be used to diagnose diseases early on, when they are more curable.

The Asia Pacific gastric cancer diagnostic market is expected to experience fastest growth due to increasing patient population, rising healthcare spending, and increased disposable income. Preventive healthcare is also gaining popularity, leading to increased demand for early detection tests. Collaborations between APAC countries and international pharmaceutical companies have facilitated the development of diagnostic reagents. Governments and private organizations are investing in healthcare, leading to the development of new diagnostic facilities and technologies. Point-of-care testing is becoming more common, and the high prevalence of gastric cancer in China and India is driving demand for advanced diagnostic tests.

Global Gastric Cancer Diagnostic Market Dynamics:

Growth Drivers: Rising geriatric population has the potential to boost the growth of the gastric cancer diagnostic market. The older a person is, the more likely he is to develop

cancer. According to American Cancer Society, the average age of people when they are diagnosed is 68. About 6 of every 10 people diagnosed with stomach cancer each year are 65 or older. Cancer starts when cells in the body get damaged. The older a person gets, the more time there is for cell damage to build up, which can lead to cancer. This can drive the growth of the gastric cancer diagnostics market. Further, the market is expected to grow due to rising disposable income as individuals with larger financial means are more likely to seek preventive medical care, including diagnostic tests, since they can afford the high charges. Other growth drivers driving the market growth includes rising prevalence of gastric cancer, growing healthcare expenditure, rising awareness about early detection, etc.

Challenges: High diagnostic cost can present several challenges for the gastric cancer diagnostic market. Advanced diagnostic technologies often come with substantial financial implications. This high cost can limit accessibility to these diagnostic tools, particularly in regions with limited healthcare budgets and resources. This can lead to delayed or inadequate diagnostic procedures, impacting timely detection and contributing to healthcare disparities. Another challenge that gastric cancer diagnostic market faces is shortage of medical laboratory professionals.

Trends: The rising trend of incorporating Artificial Intelligence (AI) and machine learning in gastric cancer diagnostics is reshaping the field by enhancing precision and efficiency in imaging analysis, automating routine tasks, and facilitating real-time decision support. These technologies contribute to early detection through advanced pattern recognition, personalized risk prediction models, and continuous learning, ultimately improving diagnostic accuracy and patient outcomes. The adaptive nature of machine learning ensures that diagnostic processes evolve with emerging trends, marking a transformative shift in the gastric cancer diagnostic landscape. More trends are believed to augment the growth of gastric cancer diagnostic market during the forecasted period include, liquid biopsies, technological advancements, etc.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has had negative impact on the global gastric cancer diagnostic market, leading to the suspension of elective surgeries and non-essential medical procedures, including cancer screening. This led to a decline in gastric cancer screening rates, with younger adults experiencing the most significant reductions, possibly due to their lower risk of developing the disease.

Post-COVID-19, the gastric cancer diagnostic market is undergoing a transition due to

strategic initiatives and public health campaigns. Healthcare systems are addressing deferred procedures and ensuring timely detection. The market is also influenced by increased adoption of personalized medicine, which tailors' treatment to individual patients, and advancements in diagnostic technologies. Artificial intelligence is being integrated into diagnostic processes, reducing turnaround times and improving accuracy.

Competitive Landscape and Recent Developments:

Global Gastric cancer diagnostic market is fragmented. Key players of global Gastric cancer diagnostic market are:

Bio-Rad Laboratories Inc
MiRXES Pte Ltd
Agilent Technologies Inc
F. Hoffmann-La Roche Ltd
Vela Diagnostics Holding Pte Ltd
Myraid Genetics Inc.
Abbott
AdvaCare Pharma (diagnosis devices)
Qiagen NV.
bioMerieux SA
Illumina Inc

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their services to emerging markets and more, to maintain a competitive edge in this market. For instance, in November 2023, Agilent Technologies has been approved by the FDA for the PD-L1 IHC 22C3 pharmDx diagnostic, which helps identify patients with gastric or GEJ adenocarcinoma suitable for treatment with pembrolizumab, chemotherapy, trastuzumab, and fluoropyrimidine. The tool is now approved in six cancer types.

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