

Global Pan-cancer Genetic Testing Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pan-cancer Genetic Testing market size is expected to reach \$ 15343 million by 2032, rising at a market growth of 13.1% CAGR during the forecast period (2026-2032).

Pan-cancer Genetic Testing refers to clinical diagnostic and precision oncology solutions that use targeted next-generation sequencing, whole-exome sequencing, whole-transcriptome sequencing, or multimodal molecular analysis to profile cancer-related genomic alterations and biomarkers across multiple solid tumors or hematologic malignancies. Major targets include single nucleotide variants, insertions and deletions, copy number alterations, gene fusions and rearrangements, as well as genomic signatures such as tumor mutational burden, microsatellite instability, and homologous recombination deficiency. Commercial offerings include centralized laboratory testing services, tissue and liquid biopsy assay kits, integrated testing systems, and associated bioinformatics solutions. These tests are mainly used for targeted therapy selection, immunotherapy assessment, clinical trial matching, molecular classification, and resistance analysis. Key upstream inputs include specimen collection components, nucleic acid extraction and library preparation reagents, capture probes, sequencing flow cells, quality controls, sequencing platforms, bioinformatics algorithms, and genomic databases. Major downstream customers include hospitals, cancer centers, independent clinical laboratories, pathology laboratories, pharmaceutical and biotechnology companies, and clinical research organizations. The estimated industry gross margin is generally approximately 50%-70%.

The global Pan-cancer Genetic Testing market is shifting from sequential single-gene and tumor-specific testing toward comprehensive genomic profiling. As the number of actionable alterations, immunotherapy biomarkers, and tumor-agnostic treatment

indications increases, sequential testing has become less efficient because of tissue consumption, longer turnaround times, and cumulative cost. Large genomic panels can evaluate multiple variant classes and genomic signatures in a single test and are therefore gaining adoption among patients with advanced solid tumors or limited standard treatment options. North America is primarily characterized by centralized reference laboratory services, while Europe and Japan rely more heavily on combinations of approved products and designated hospital networks. China has developed a mixed structure that includes centralized testing services, hospital-based laboratories, and locally manufactured standardized assay kits.

Tissue-based testing remains the foundation of comprehensive genomic profiling, but liquid biopsy is becoming an important complementary option for patients with insufficient tissue, high biopsy risk, or a need for faster results. Testing scope is expanding from targeted panels containing several hundred genes toward integrated DNA and RNA analysis, matched tumor-normal sequencing, whole-exome sequencing, and whole-transcriptome sequencing. RNA analysis can improve the detection of gene fusions and abnormal splicing events, while matched-normal analysis can distinguish somatic alterations from germline variants and clonal hematopoiesis signals. Future differentiation will depend increasingly on analytical performance in low-tumor-content samples, fusion detection, turnaround time, the strength of clinical evidence, and the actionability of report interpretation rather than on gene count alone.

Market growth is supported by the expansion of precision oncology, increasing numbers of tumor-agnostic targeted and immunotherapy indications, stronger guideline recommendations, and broader availability of hospital NGS infrastructure. Drug development programs increasingly stratify patients according to shared molecular alterations across different tumor types rather than according to the organ of origin alone. Pharmaceutical demand for companion diagnostic development, clinical trial recruitment, biomarker strategy, and real-world evidence also provides testing companies with revenue opportunities beyond routine patient testing. As sequencing costs decline, workflows become more automated, and reimbursement coverage improves, pan-cancer testing is expected to extend from late-stage and rare cases toward earlier treatment stages and a broader patient population.

The industry nevertheless faces constraints related to specimen quality, testing cost, reimbursement, and the clinical conversion of genomic findings. Differences in gene coverage, sequencing depth, variant thresholds, and reporting rules may lead to inconsistent results across laboratories. Some patients have potentially actionable alterations but cannot access the matched treatment because of regulatory indications,

drug availability, or the location of relevant clinical trials. Competition between hospital-developed assays and centralized laboratory services may place pressure on pricing and lead to duplicated infrastructure investment. Future competitive advantage will depend on regulatory approvals, companion diagnostic partnerships, liquid biopsy performance, interpretation capabilities, reimbursement access, and evidence of clinical utility, while companies must also address incidental germline findings, informed consent, and the security of genomic data.

This report studies the global Pan-cancer Genetic Testing demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pan-cancer Genetic Testing, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Pan-cancer Genetic Testing that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pan-cancer Genetic Testing total market, 2021-2032, (USD Million)

Global Pan-cancer Genetic Testing total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Pan-cancer Genetic Testing total market, key domestic companies, and share, (USD Million)

Global Pan-cancer Genetic Testing revenue by player, revenue and market share 2021-2026, (USD Million)

Global Pan-cancer Genetic Testing total market by Type, CAGR, 2021-2032, (USD Million)

Global Pan-cancer Genetic Testing total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Pan-cancer Genetic Testing market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Roche, Guardant Health, Caris Life Sciences, Tempus AI, Labcorp, NeoGenomics, Exact Sciences, Personalis, Illumina, Thermo Fisher Scientific, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Pan-cancer Genetic Testing market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Pan-cancer Genetic Testing Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pan-cancer Genetic Testing Market, Segmentation by Type:

Tissue-based Testing

Liquid Biopsy Testing

Other

Global Pan-cancer Genetic Testing Market, Segmentation by Testing Scope:

Medium Panels (50?199 Genes)

Large Panels (200?599 Genes)

Extended Panels (600?999 Genes)

Other

Global Pan-cancer Genetic Testing Market, Segmentation by Technology:

Targeted NGS

Whole-exome Sequencing

Whole-transcriptome Sequencing

Other

Global Pan-cancer Genetic Testing Market, Segmentation by Application:

Hospitals and Cancer Centers

Independent Clinical Laboratories

Other

Companies Profiled:

Roche

Guardant Health

Caris Life Sciences

Tempus AI

Labcorp

NeoGenomics

Exact Sciences

Personalis

Illumina

Thermo Fisher Scientific

QIAGEN

Agilent Technologies

SOPHiA GENETICS

Sysmex

Burning Rock Biotech

Genetron Health

Geneseeq

BGI Genomics

Amoy Diagnostics

Key Questions Answered

1. How big is the global Pan-cancer Genetic Testing market?
2. What is the demand of the global Pan-cancer Genetic Testing market?
3. What is the year over year growth of the global Pan-cancer Genetic Testing market?
4. What is the total value of the global Pan-cancer Genetic Testing market?
5. Who are the Major Players in the global Pan-cancer Genetic Testing market?

6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Pan-cancer Genetic Testing Introduction
- 1.2 World Pan-cancer Genetic Testing Market Size & Forecast (2021 & 2025 & 2032)
- 1.3 World Pan-cancer Genetic Testing Total Market by Region (by Headquarter Location)
 - 1.3.1 World Pan-cancer Genetic Testing Market Size by Region (2021-2032), (by Headquarter Location)
 - 1.3.2 United States Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
 - 1.3.3 China Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
 - 1.3.4 Europe Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
 - 1.3.5 Japan Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
 - 1.3.6 South Korea Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
 - 1.3.7 ASEAN Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
 - 1.3.8 India Based Company Pan-cancer Genetic Testing Revenue (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Pan-cancer Genetic Testing Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.2 World Pan-cancer Genetic Testing Consumption Value by Region
 - 2.2.1 World Pan-cancer Genetic Testing Consumption Value by Region (2021-2026)
 - 2.2.2 World Pan-cancer Genetic Testing Consumption Value Forecast by Region (2027-2032)
- 2.3 United States Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.4 China Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.5 Europe Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.6 Japan Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.7 South Korea Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.8 ASEAN Pan-cancer Genetic Testing Consumption Value (2021-2032)
- 2.9 India Pan-cancer Genetic Testing Consumption Value (2021-2032)

3 WORLD PAN-CANCER GENETIC TESTING COMPANIES COMPETITIVE

ANALYSIS

- 3.1 World Pan-cancer Genetic Testing Revenue by Player (2021-2026)
- 3.2 Industry Rank and Concentration Rate (CR)
 - 3.2.1 Global Pan-cancer Genetic Testing Industry Rank of Major Players
 - 3.2.2 Global Concentration Ratios (CR4) for Pan-cancer Genetic Testing in 2025
 - 3.2.3 Global Concentration Ratios (CR8) for Pan-cancer Genetic Testing in 2025
- 3.3 Pan-cancer Genetic Testing Company Evaluation Quadrant
- 3.4 Pan-cancer Genetic Testing Market: Overall Company Footprint Analysis
 - 3.4.1 Pan-cancer Genetic Testing Market: Region Footprint
 - 3.4.2 Pan-cancer Genetic Testing Market: Company Product Type Footprint
 - 3.4.3 Pan-cancer Genetic Testing Market: Company Product Application Footprint
- 3.5 Competitive Environment
 - 3.5.1 Historical Structure of the Industry
 - 3.5.2 Barriers of Market Entry
 - 3.5.3 Factors of Competition
- 3.6 Mergers & Acquisitions Activity

4 UNITED STATES VS CHINA VS REST OF WORLD (BY HEADQUARTER LOCATION)

- 4.1 United States VS China: Pan-cancer Genetic Testing Revenue Comparison (by Headquarter Location)
 - 4.1.1 United States VS China: Pan-cancer Genetic Testing Revenue Comparison (2021 & 2025 & 2032) (by Headquarter Location)
 - 4.1.2 United States VS China: Pan-cancer Genetic Testing Revenue Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States Based Companies VS China Based Companies: Pan-cancer Genetic Testing Consumption Value Comparison
 - 4.2.1 United States VS China: Pan-cancer Genetic Testing Consumption Value Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Pan-cancer Genetic Testing Consumption Value Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States Based Pan-cancer Genetic Testing Companies and Market Share, 2021-2026
 - 4.3.1 United States Based Pan-cancer Genetic Testing Companies, Headquarters (States, Country)
 - 4.3.2 United States Based Companies Pan-cancer Genetic Testing Revenue, (2021-2026)

4.4 China Based Companies Pan-cancer Genetic Testing Revenue and Market Share, 2021-2026

4.4.1 China Based Pan-cancer Genetic Testing Companies, Company Headquarters (Province, Country)

4.4.2 China Based Companies Pan-cancer Genetic Testing Revenue, (2021-2026)

4.5 Rest of World Based Pan-cancer Genetic Testing Companies and Market Share, 2021-2026

4.5.1 Rest of World Based Pan-cancer Genetic Testing Companies, Headquarters (Province, Country)

4.5.2 Rest of World Based Companies Pan-cancer Genetic Testing Revenue (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Pan-cancer Genetic Testing Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Tissue-based Testing

5.2.2 Liquid Biopsy Testing

5.2.3 Other

5.3 Market Segment by Type

5.3.1 World Pan-cancer Genetic Testing Market Size by Type (2021-2026)

5.3.2 World Pan-cancer Genetic Testing Market Size by Type (2027-2032)

5.3.3 World Pan-cancer Genetic Testing Market Size Market Share by Type (2027-2032)

6 MARKET ANALYSIS BY TESTING SCOPE

6.1 World Pan-cancer Genetic Testing Market Size Overview by Testing Scope: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Testing Scope

6.2.1 Medium Panels (50?199 Genes)

6.2.2 Large Panels (200?599 Genes)

6.2.3 Extended Panels (600?999 Genes)

6.2.4 Other

6.3 Market Segment by Testing Scope

6.3.1 World Pan-cancer Genetic Testing Market Size by Testing Scope (2021-2026)

6.3.2 World Pan-cancer Genetic Testing Market Size by Testing Scope (2027-2032)

6.3.3 World Pan-cancer Genetic Testing Market Size Market Share by Testing Scope

(2027-2032)

7 MARKET ANALYSIS BY TECHNOLOGY

7.1 World Pan-cancer Genetic Testing Market Size Overview by Technology: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Technology

7.2.1 Targeted NGS

7.2.2 Whole-exome Sequencing

7.2.3 Whole-transcriptome Sequencing

7.2.4 Other

7.3 Market Segment by Technology

7.3.1 World Pan-cancer Genetic Testing Market Size by Technology (2021-2026)

7.3.2 World Pan-cancer Genetic Testing Market Size by Technology (2027-2032)

7.3.3 World Pan-cancer Genetic Testing Market Size Market Share by Technology (2027-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Pan-cancer Genetic Testing Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Hospitals and Cancer Centers

8.2.2 Independent Clinical Laboratories

8.2.3 Other

8.3 Market Segment by Application

8.3.1 World Pan-cancer Genetic Testing Market Size by Application (2021-2026)

8.3.2 World Pan-cancer Genetic Testing Market Size by Application (2027-2032)

8.3.3 World Pan-cancer Genetic Testing Market Size Market Share by Application (2021-2032)

9 COMPANY PROFILES

9.1 Roche

9.1.1 Roche Details

9.1.2 Roche Major Business

9.1.3 Roche Pan-cancer Genetic Testing Product and Services

9.1.4 Roche Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

- 9.1.5 Roche Recent Developments/Updates
- 9.1.6 Roche Competitive Strengths & Weaknesses
- 9.2 Guardant Health
 - 9.2.1 Guardant Health Details
 - 9.2.2 Guardant Health Major Business
 - 9.2.3 Guardant Health Pan-cancer Genetic Testing Product and Services
 - 9.2.4 Guardant Health Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.2.5 Guardant Health Recent Developments/Updates
 - 9.2.6 Guardant Health Competitive Strengths & Weaknesses
- 9.3 Caris Life Sciences
 - 9.3.1 Caris Life Sciences Details
 - 9.3.2 Caris Life Sciences Major Business
 - 9.3.3 Caris Life Sciences Pan-cancer Genetic Testing Product and Services
 - 9.3.4 Caris Life Sciences Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Caris Life Sciences Recent Developments/Updates
 - 9.3.6 Caris Life Sciences Competitive Strengths & Weaknesses
- 9.4 Tempus AI
 - 9.4.1 Tempus AI Details
 - 9.4.2 Tempus AI Major Business
 - 9.4.3 Tempus AI Pan-cancer Genetic Testing Product and Services
 - 9.4.4 Tempus AI Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Tempus AI Recent Developments/Updates
 - 9.4.6 Tempus AI Competitive Strengths & Weaknesses
- 9.5 Labcorp
 - 9.5.1 Labcorp Details
 - 9.5.2 Labcorp Major Business
 - 9.5.3 Labcorp Pan-cancer Genetic Testing Product and Services
 - 9.5.4 Labcorp Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Labcorp Recent Developments/Updates
 - 9.5.6 Labcorp Competitive Strengths & Weaknesses
- 9.6 NeoGenomics
 - 9.6.1 NeoGenomics Details
 - 9.6.2 NeoGenomics Major Business
 - 9.6.3 NeoGenomics Pan-cancer Genetic Testing Product and Services
 - 9.6.4 NeoGenomics Pan-cancer Genetic Testing Revenue, Gross Margin and Market

Share (2021-2026)

9.6.5 NeoGenomics Recent Developments/Updates

9.6.6 NeoGenomics Competitive Strengths & Weaknesses

9.7 Exact Sciences

9.7.1 Exact Sciences Details

9.7.2 Exact Sciences Major Business

9.7.3 Exact Sciences Pan-cancer Genetic Testing Product and Services

9.7.4 Exact Sciences Pan-cancer Genetic Testing Revenue, Gross Margin and Market

Share (2021-2026)

9.7.5 Exact Sciences Recent Developments/Updates

9.7.6 Exact Sciences Competitive Strengths & Weaknesses

9.8 Personalis

9.8.1 Personalis Details

9.8.2 Personalis Major Business

9.8.3 Personalis Pan-cancer Genetic Testing Product and Services

9.8.4 Personalis Pan-cancer Genetic Testing Revenue, Gross Margin and Market

Share (2021-2026)

9.8.5 Personalis Recent Developments/Updates

9.8.6 Personalis Competitive Strengths & Weaknesses

9.9 Illumina

9.9.1 Illumina Details

9.9.2 Illumina Major Business

9.9.3 Illumina Pan-cancer Genetic Testing Product and Services

9.9.4 Illumina Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share

(2021-2026)

9.9.5 Illumina Recent Developments/Updates

9.9.6 Illumina Competitive Strengths & Weaknesses

9.10 Thermo Fisher Scientific

9.10.1 Thermo Fisher Scientific Details

9.10.2 Thermo Fisher Scientific Major Business

9.10.3 Thermo Fisher Scientific Pan-cancer Genetic Testing Product and Services

9.10.4 Thermo Fisher Scientific Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

9.10.5 Thermo Fisher Scientific Recent Developments/Updates

9.10.6 Thermo Fisher Scientific Competitive Strengths & Weaknesses

9.11 QIAGEN

9.11.1 QIAGEN Details

9.11.2 QIAGEN Major Business

9.11.3 QIAGEN Pan-cancer Genetic Testing Product and Services

9.11.4 QIAGEN Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

9.11.5 QIAGEN Recent Developments/Updates

9.11.6 QIAGEN Competitive Strengths & Weaknesses

9.12 Agilent Technologies

9.12.1 Agilent Technologies Details

9.12.2 Agilent Technologies Major Business

9.12.3 Agilent Technologies Pan-cancer Genetic Testing Product and Services

9.12.4 Agilent Technologies Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

9.12.5 Agilent Technologies Recent Developments/Updates

9.12.6 Agilent Technologies Competitive Strengths & Weaknesses

9.13 SOPHiA GENETICS

9.13.1 SOPHiA GENETICS Details

9.13.2 SOPHiA GENETICS Major Business

9.13.3 SOPHiA GENETICS Pan-cancer Genetic Testing Product and Services

9.13.4 SOPHiA GENETICS Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

9.13.5 SOPHiA GENETICS Recent Developments/Updates

9.13.6 SOPHiA GENETICS Competitive Strengths & Weaknesses

9.14 Sysmex

9.14.1 Sysmex Details

9.14.2 Sysmex Major Business

9.14.3 Sysmex Pan-cancer Genetic Testing Product and Services

9.14.4 Sysmex Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

9.14.5 Sysmex Recent Developments/Updates

9.14.6 Sysmex Competitive Strengths & Weaknesses

9.15 Burning Rock Biotech

9.15.1 Burning Rock Biotech Details

9.15.2 Burning Rock Biotech Major Business

9.15.3 Burning Rock Biotech Pan-cancer Genetic Testing Product and Services

9.15.4 Burning Rock Biotech Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)

9.15.5 Burning Rock Biotech Recent Developments/Updates

9.15.6 Burning Rock Biotech Competitive Strengths & Weaknesses

9.16 Genetron Health

9.16.1 Genetron Health Details

9.16.2 Genetron Health Major Business

- 9.16.3 Genetron Health Pan-cancer Genetic Testing Product and Services
- 9.16.4 Genetron Health Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
- 9.16.5 Genetron Health Recent Developments/Updates
- 9.16.6 Genetron Health Competitive Strengths & Weaknesses
- 9.17 Geneseeq
 - 9.17.1 Geneseeq Details
 - 9.17.2 Geneseeq Major Business
 - 9.17.3 Geneseeq Pan-cancer Genetic Testing Product and Services
 - 9.17.4 Geneseeq Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Geneseeq Recent Developments/Updates
 - 9.17.6 Geneseeq Competitive Strengths & Weaknesses
- 9.18 BGI Genomics
 - 9.18.1 BGI Genomics Details
 - 9.18.2 BGI Genomics Major Business
 - 9.18.3 BGI Genomics Pan-cancer Genetic Testing Product and Services
 - 9.18.4 BGI Genomics Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.18.5 BGI Genomics Recent Developments/Updates
 - 9.18.6 BGI Genomics Competitive Strengths & Weaknesses
- 9.19 Amoy Diagnostics
 - 9.19.1 Amoy Diagnostics Details
 - 9.19.2 Amoy Diagnostics Major Business
 - 9.19.3 Amoy Diagnostics Pan-cancer Genetic Testing Product and Services
 - 9.19.4 Amoy Diagnostics Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026)
 - 9.19.5 Amoy Diagnostics Recent Developments/Updates
 - 9.19.6 Amoy Diagnostics Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Pan-cancer Genetic Testing Industry Chain
- 10.2 Pan-cancer Genetic Testing Upstream Analysis
- 10.3 Pan-cancer Genetic Testing Midstream Analysis
- 10.4 Pan-cancer Genetic Testing Downstream Analysis

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Pan-cancer Genetic Testing Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Table 2. World Pan-cancer Genetic Testing Revenue by Region (2021-2026) & (USD Million), (by Headquarter Location)

Table 3. World Pan-cancer Genetic Testing Revenue by Region (2027-2032) & (USD Million), (by Headquarter Location)

Table 4. World Pan-cancer Genetic Testing Revenue Market Share by Region (2021-2026), (by Headquarter Location)

Table 5. World Pan-cancer Genetic Testing Revenue Market Share by Region (2027-2032), (by Headquarter Location)

Table 6. Major Market Trends

Table 7. World Pan-cancer Genetic Testing Consumption Value Growth Rate Forecast by Region (2021 & 2025 & 2032) & (USD Million)

Table 8. World Pan-cancer Genetic Testing Consumption Value by Region (2021-2026) & (USD Million)

Table 9. World Pan-cancer Genetic Testing Consumption Value Forecast by Region (2027-2032) & (USD Million)

Table 10. World Pan-cancer Genetic Testing Revenue by Player (2021-2026) & (USD Million)

Table 11. Revenue Market Share of Key Pan-cancer Genetic Testing Players in 2025

Table 12. World Pan-cancer Genetic Testing Industry Rank of Major Player, Based on Revenue in 2025

Table 13. Global Pan-cancer Genetic Testing Company Evaluation Quadrant

Table 14. Head Office of Key Pan-cancer Genetic Testing Players

Table 15. Pan-cancer Genetic Testing Market: Company Product Type Footprint

Table 16. Pan-cancer Genetic Testing Market: Company Product Application Footprint

Table 17. Pan-cancer Genetic Testing Mergers & Acquisitions Activity

Table 18. United States VS China Pan-cancer Genetic Testing Revenue Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 19. United States VS China Pan-cancer Genetic Testing Consumption Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 20. United States Based Pan-cancer Genetic Testing Companies, Headquarters (States, Country)

Table 21. United States Based Companies Pan-cancer Genetic Testing Revenue, (2021-2026) & (USD Million)

Table 22. United States Based Companies Pan-cancer Genetic Testing Revenue Market Share (2021-2026)

Table 23. China Based Pan-cancer Genetic Testing Companies, Headquarters (Province, Country)

Table 24. China Based Companies Pan-cancer Genetic Testing Revenue, (2021-2026) & (USD Million)

Table 25. China Based Companies Pan-cancer Genetic Testing Revenue Market Share (2021-2026)

Table 26. Rest of World Based Pan-cancer Genetic Testing Companies, Headquarters (Province, Country)

Table 27. Rest of World Based Companies Pan-cancer Genetic Testing Revenue (2021-2026) & (USD Million)

Table 28. Rest of World Based Companies Pan-cancer Genetic Testing Revenue Market Share (2021-2026)

Table 29. World Pan-cancer Genetic Testing Market Size by Type, (USD Million), 2021 & 2025 & 2032

Table 30. World Pan-cancer Genetic Testing Market Size Value by Type (2021-2026) & (USD Million)

Table 31. World Pan-cancer Genetic Testing Market Size by Type (2027-2032) & (USD Million)

Table 32. World Pan-cancer Genetic Testing Market Size by Testing Scope, (USD Million), 2021 & 2025 & 2032

Table 33. World Pan-cancer Genetic Testing Market Size Value by Testing Scope (2021-2026) & (USD Million)

Table 34. World Pan-cancer Genetic Testing Market Size by Testing Scope (2027-2032) & (USD Million)

Table 35. World Pan-cancer Genetic Testing Market Size by Technology, (USD Million), 2021 & 2025 & 2032

Table 36. World Pan-cancer Genetic Testing Market Size Value by Technology (2021-2026) & (USD Million)

Table 37. World Pan-cancer Genetic Testing Market Size by Technology (2027-2032) & (USD Million)

Table 38. World Pan-cancer Genetic Testing Market Size by Application, (USD Million), 2021 & 2025 & 2032

Table 39. World Pan-cancer Genetic Testing Market Size by Application (2021-2026) & (USD Million)

Table 40. World Pan-cancer Genetic Testing Market Size by Application (2027-2032) & (USD Million)

Table 41. Roche Basic Information, Manufacturing Base and Competitors

Table 42. Roche Major Business
Table 43. Roche Pan-cancer Genetic Testing Product and Services
Table 44. Roche Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 45. Roche Recent Developments/Updates
Table 46. Roche Competitive Strengths & Weaknesses
Table 47. Guardant Health Basic Information, Manufacturing Base and Competitors
Table 48. Guardant Health Major Business
Table 49. Guardant Health Pan-cancer Genetic Testing Product and Services
Table 50. Guardant Health Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 51. Guardant Health Recent Developments/Updates
Table 52. Guardant Health Competitive Strengths & Weaknesses
Table 53. Caris Life Sciences Basic Information, Manufacturing Base and Competitors
Table 54. Caris Life Sciences Major Business
Table 55. Caris Life Sciences Pan-cancer Genetic Testing Product and Services
Table 56. Caris Life Sciences Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 57. Caris Life Sciences Recent Developments/Updates
Table 58. Caris Life Sciences Competitive Strengths & Weaknesses
Table 59. Tempus AI Basic Information, Manufacturing Base and Competitors
Table 60. Tempus AI Major Business
Table 61. Tempus AI Pan-cancer Genetic Testing Product and Services
Table 62. Tempus AI Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 63. Tempus AI Recent Developments/Updates
Table 64. Tempus AI Competitive Strengths & Weaknesses
Table 65. Labcorp Basic Information, Manufacturing Base and Competitors
Table 66. Labcorp Major Business
Table 67. Labcorp Pan-cancer Genetic Testing Product and Services
Table 68. Labcorp Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 69. Labcorp Recent Developments/Updates
Table 70. Labcorp Competitive Strengths & Weaknesses
Table 71. NeoGenomics Basic Information, Manufacturing Base and Competitors
Table 72. NeoGenomics Major Business
Table 73. NeoGenomics Pan-cancer Genetic Testing Product and Services
Table 74. NeoGenomics Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 75. NeoGenomics Recent Developments/Updates
Table 76. NeoGenomics Competitive Strengths & Weaknesses
Table 77. Exact Sciences Basic Information, Manufacturing Base and Competitors
Table 78. Exact Sciences Major Business
Table 79. Exact Sciences Pan-cancer Genetic Testing Product and Services
Table 80. Exact Sciences Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 81. Exact Sciences Recent Developments/Updates
Table 82. Exact Sciences Competitive Strengths & Weaknesses
Table 83. Personalis Basic Information, Manufacturing Base and Competitors
Table 84. Personalis Major Business
Table 85. Personalis Pan-cancer Genetic Testing Product and Services
Table 86. Personalis Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 87. Personalis Recent Developments/Updates
Table 88. Personalis Competitive Strengths & Weaknesses
Table 89. Illumina Basic Information, Manufacturing Base and Competitors
Table 90. Illumina Major Business
Table 91. Illumina Pan-cancer Genetic Testing Product and Services
Table 92. Illumina Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 93. Illumina Recent Developments/Updates
Table 94. Illumina Competitive Strengths & Weaknesses
Table 95. Thermo Fisher Scientific Basic Information, Manufacturing Base and Competitors
Table 96. Thermo Fisher Scientific Major Business
Table 97. Thermo Fisher Scientific Pan-cancer Genetic Testing Product and Services
Table 98. Thermo Fisher Scientific Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 99. Thermo Fisher Scientific Recent Developments/Updates
Table 100. Thermo Fisher Scientific Competitive Strengths & Weaknesses
Table 101. QIAGEN Basic Information, Manufacturing Base and Competitors
Table 102. QIAGEN Major Business
Table 103. QIAGEN Pan-cancer Genetic Testing Product and Services
Table 104. QIAGEN Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 105. QIAGEN Recent Developments/Updates
Table 106. QIAGEN Competitive Strengths & Weaknesses
Table 107. Agilent Technologies Basic Information, Manufacturing Base and

Competitors

Table 108. Agilent Technologies Major Business

Table 109. Agilent Technologies Pan-cancer Genetic Testing Product and Services

Table 110. Agilent Technologies Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 111. Agilent Technologies Recent Developments/Updates

Table 112. Agilent Technologies Competitive Strengths & Weaknesses

Table 113. SOPHiA GENETICS Basic Information, Manufacturing Base and Competitors

Table 114. SOPHiA GENETICS Major Business

Table 115. SOPHiA GENETICS Pan-cancer Genetic Testing Product and Services

Table 116. SOPHiA GENETICS Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 117. SOPHiA GENETICS Recent Developments/Updates

Table 118. SOPHiA GENETICS Competitive Strengths & Weaknesses

Table 119. Sysmex Basic Information, Manufacturing Base and Competitors

Table 120. Sysmex Major Business

Table 121. Sysmex Pan-cancer Genetic Testing Product and Services

Table 122. Sysmex Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 123. Sysmex Recent Developments/Updates

Table 124. Sysmex Competitive Strengths & Weaknesses

Table 125. Burning Rock Biotech Basic Information, Manufacturing Base and Competitors

Table 126. Burning Rock Biotech Major Business

Table 127. Burning Rock Biotech Pan-cancer Genetic Testing Product and Services

Table 128. Burning Rock Biotech Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 129. Burning Rock Biotech Recent Developments/Updates

Table 130. Burning Rock Biotech Competitive Strengths & Weaknesses

Table 131. Genetron Health Basic Information, Manufacturing Base and Competitors

Table 132. Genetron Health Major Business

Table 133. Genetron Health Pan-cancer Genetic Testing Product and Services

Table 134. Genetron Health Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)

Table 135. Genetron Health Recent Developments/Updates

Table 136. Genetron Health Competitive Strengths & Weaknesses

Table 137. Geneseeq Basic Information, Manufacturing Base and Competitors

Table 138. Geneseeq Major Business

Table 139. Geneseeq Pan-cancer Genetic Testing Product and Services
Table 140. Geneseeq Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 141. Geneseeq Recent Developments/Updates
Table 142. Geneseeq Competitive Strengths & Weaknesses
Table 143. BGI Genomics Basic Information, Manufacturing Base and Competitors
Table 144. BGI Genomics Major Business
Table 145. BGI Genomics Pan-cancer Genetic Testing Product and Services
Table 146. BGI Genomics Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 147. BGI Genomics Recent Developments/Updates
Table 148. BGI Genomics Competitive Strengths & Weaknesses
Table 149. Amoy Diagnostics Basic Information, Manufacturing Base and Competitors
Table 150. Amoy Diagnostics Major Business
Table 151. Amoy Diagnostics Pan-cancer Genetic Testing Product and Services
Table 152. Amoy Diagnostics Pan-cancer Genetic Testing Revenue, Gross Margin and Market Share (2021-2026) & (USD Million)
Table 153. Amoy Diagnostics Recent Developments/Updates
Table 154. Amoy Diagnostics Competitive Strengths & Weaknesses
Table 155. Global Key Players of Pan-cancer Genetic Testing Upstream (Raw Materials)
Table 156. Global Pan-cancer Genetic Testing Typical Customers

List Of Figures

LIST OF FIGURES

Figure 1. Pan-cancer Genetic Testing Picture

Figure 2. World Pan-cancer Genetic Testing Total Revenue: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Pan-cancer Genetic Testing Total Revenue (2021-2032) & (USD Million)

Figure 4. World Pan-cancer Genetic Testing Revenue by Region (2021, 2025 and 2032) & (USD Million), (by Headquarter Location)

Figure 5. World Pan-cancer Genetic Testing Revenue Market Share by Region (2021-2032), (by Headquarter Location)

Figure 6. United States Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 7. China Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 8. Europe Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 9. Japan Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 10. South Korea Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 11. ASEAN Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 12. India Based Company Pan-cancer Genetic Testing Revenue (2021-2032) & (USD Million)

Figure 13. Pan-cancer Genetic Testing Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 16. World Pan-cancer Genetic Testing Consumption Value Market Share by Region (2021-2032)

Figure 17. United States Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 18. China Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 19. Europe Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 20. Japan Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 21. South Korea Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 22. ASEAN Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 23. India Pan-cancer Genetic Testing Consumption Value (2021-2032) & (USD Million)

Figure 24. Producer Shipments of Pan-cancer Genetic Testing by Player Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Pan-cancer Genetic Testing Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Pan-cancer Genetic Testing Markets in 2025

Figure 27. United States VS China: Pan-cancer Genetic Testing Revenue Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Pan-cancer Genetic Testing Consumption Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. World Pan-cancer Genetic Testing Market Size by Type, (USD Million), 2021 & 2025 & 2032

Figure 30. World Pan-cancer Genetic Testing Market Size Market Share by Type in 2025

Figure 31. Tissue-based Testing

Figure 32. Liquid Biopsy Testing

Figure 33. Other

Figure 34. World Pan-cancer Genetic Testing Market Size Market Share by Type (2021-2032)

Figure 35. World Pan-cancer Genetic Testing Market Size by Testing Scope, (USD Million), 2021 & 2025 & 2032

Figure 36. World Pan-cancer Genetic Testing Market Size Market Share by Testing Scope in 2025

Figure 37. Medium Panels (50?199 Genes)

Figure 38. Large Panels (200?599 Genes)

Figure 39. Extended Panels (600?999 Genes)

Figure 40. Other

Figure 41. World Pan-cancer Genetic Testing Market Size Market Share by Testing Scope (2021-2032)

Figure 42. World Pan-cancer Genetic Testing Market Size by Technology, (USD Million), 2021 & 2025 & 2032

Figure 43. World Pan-cancer Genetic Testing Market Size Market Share by Technology in 2025

Figure 44. Targeted NGS

Figure 45. Whole-exome Sequencing

Figure 46. Whole-transcriptome Sequencing

Figure 47. Other

Figure 48. World Pan-cancer Genetic Testing Market Size Market Share by Technology (2021-2032)

Figure 49. World Pan-cancer Genetic Testing Market Size by Application, (USD Million), 2021 & 2025 & 2032

Figure 50. World Pan-cancer Genetic Testing Market Size Market Share by Application in 2025

Figure 51. Hospitals and Cancer Centers

Figure 52. Independent Clinical Laboratories

Figure 53. Other

Figure 54. World Pan-cancer Genetic Testing Market Size Market Share by Application (2021-2032)

Figure 55. Pan-cancer Genetic Testing Industrial Chain

Figure 56. Methodology

Figure 57. Research Process and Data Source

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