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Middle East Oncology Based Molecular Diagnostics Market Size, Share & Trends Analysis Report By Type (Breast Cancer, Lung Cancer, Prostate Cancer, Liver Cancer), By Product (Instruments, Reagents), By Technology, By Country, And Segment Forecasts, 2025 - 2033

https://marketpublishers.com/r/MC881D5826FEEN.html
Date: September 2025
Pages: 320
Price: US$ 5,950.00 (Single User License)
ID: MC881D5826FEEN

Abstracts

Market Size & Trends

The Middle East oncology based molecular diagnostics market size was estimated at USD 82.5 million in 2024 and is projected to grow at a CAGR of 5.6% from 2025 to 2033. Growth in the Middle East oncology-based molecular diagnostics market is driven by rising cancer incidence, increasing government investment in healthcare infrastructure, and the growing shift toward precision medicine. National cancer control programs in countries such as the UAE, Saudi Arabia, and Qatar are prioritizing early detection and biomarker-driven treatment. Expanding access to advanced technologies like NGS, PCR, and liquid biopsy is supported by public-private partnerships and multinational collaborations. Additionally, increased awareness, favorable reimbursement reforms, and the entry of global diagnostic companies are accelerating test adoption across the region.

The Middle East oncology-based molecular diagnostics market is experiencing rapid growth, driven by increasing cancer rates, changing disease patterns, and significant public–private investment in precision medicine infrastructure. In the UAE, growth is supported by the Emirati Genome Programme (EGP), launched in 2021, which has sequenced over 214,000 genomes in just 15 months, creating a population-specific reference database to guide clinical decisions. In June 2024, the Department of Health

– Abu Dhabi formalized a strategic partnership with Illumina to incorporate next-generation sequencing (NGS) and multi-omics into clinical workflows, improve clinician training, and assess the economic benefits of adopting precision health. Additionally, Burjeel Medical City launched OncoHelix-coLAB in May 2024, in partnership with Canada's OncoHelix, bringing comprehensive genomic profiling, immunology, and cellular diagnostics to the region-reducing turnaround times, increasing access, and allowing for higher patient throughput. Nonetheless, screening coverage remains uneven, with no unified national program and participation rates for breast and colorectal cancer estimated at less than 25% of the eligible population, creating a need for high-coverage, minimally invasive diagnostics and targeted risk assessment methods.

Oman is a high-growth market with clear capacity gaps. Cancer accounts for about 6% of disease-related deaths, with crude incidence rates in 2017 of 70.2 per 100,000 males and 80.9 per 100,000 females. GLOBOCAN projects new cancer cases will rise from 2,101 in 2017 to 5,761 by 2030 and 8,549 by 2040. Changes in disease patterns, such as colorectal cancer surpassing gastric cancer, a two- to threefold increase in lung cancer diagnoses, and a fivefold rise in thyroid cancer among females-along with high prevalence of lifestyle risk factors (obesity around 53%, smoking about 15%)-are driving ongoing demand for advanced molecular testing. The National Oncology Center at the Royal Hospital, established in 2004, manages approximately 70% of the country's cancer cases and offers FISH, IHC, and cytogenetics. However, many essential molecular assays, including RAS, BRAF, and PIK3CA, are outsourced to international labs, highlighting an opportunity for local expansion in PCR, NGS, and liquid biopsy capabilities. Oman's Health Vision 2050, launched in 2014, emphasizes expanding oncology services, creating comprehensive cancer centers, and decentralizing care, supported by a well-developed national cancer registry and successful mobile screening initiatives.

In Kuwait, market growth is being catalyzed by strategic private-sector partnerships. In December 2021, Virtus Health Partners and Datar Cancer Genetics entered into an agreement to deploy advanced, non-invasive, blood-based multi-cancer detection and genomic profiling solutions, aiming to standardize precision oncology care pathways and integrate cutting-edge molecular diagnostics into clinical practice.

Collectively, these developments highlight the market's upward trend, driven by key factors such as rising cancer rates, supportive government-led genomic initiatives, development of advanced laboratory capabilities locally, unmet needs for early detection tools, and the incorporation of precision oncology into standard care protocols.

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Companies with portfolios that include PCR (such as digital PCR), NGS platforms, ISH/IHC companion diagnostics, liquid biopsy panels, high-performance reagents, and bioinformatics-based decision support are well-positioned to gain market share in this quickly evolving ecosystem.

Middle East Oncology Based Molecular Diagnostics Market Report Segmentation

This report forecasts revenue growth and provides an analysis of the latest trends in each of the sub-segments from 2021 to 2033. For this study, Grand View Research has segmented the Middle East oncology based molecular diagnostics market based on product, technology, type, and region:

Type Outlook (USD Million, 2021 - 2033)

Breast Cancer

Prostate Cancer

Colorectal Cancer

Cervical Cancer

Liver Cancer

Lung Cancer

Blood Cancer

Kidney Cancer

Others

Product Outlook (USD Million, 2021 - 2033)

Instruments

Reagents

Others

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Technology Outlook (USD Million, 2021 - 2033)

PCR

In situ hybridization

INAAT

Chips and microarrays

Mass spectrometry

Sequencing

TMA

Others

Regional Outlook (USD Million, 2021 - 2033)

Middle East

- Saudi Arabia
- UAE
- Kuwait
- Qatar
- Oman

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CHAPTER 8. COMPETITIVE LANDSCAPE

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