

Minimal Residual Disease Market by Product (Kits, Instruments), Technology (PCR, NGS), Application (Leukemia, Lymphoma, Multiple Myeloma, Solid Tumors), End User (Hospitals, Diagnostic Labs, Research Institutes), & Region - Global Forecast to 2029

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Abstracts

The MRD testing market will rise in value from estimated USD 1.43 Billion in 2024 to USD 2.55 Billion in 2029, at a CAGR of 12.2% over the forecast period. Increased funding and grants for cancer control programs across the globe have emerged as an important growth factor in the MRD testing market. Substantial funding is now being committed by governments and international bodies, including WHO and the Global Fund, to address the increasing burden of cancer, especially in terms of early detection and prevention. These funds are being channelled into increasing access to diagnostic facilities, especially in high-burden regions where the healthcare infrastructure is generally weak. The availability of funds also encourages the training of healthcare professionals who work with a patient to accurately diagnose and properly manage cases of cancer. Apart from that, research grants and international collaborations are also enabling cancer testing integration into routine health care services. Thus, this growing funding is rendering MRD tests available and enhancing the efforts to control cancer globally. This, in turn, is fuelling the growth of the global minimal residual disease testing market.

“MRD Assay Kits & Reagents segment is expected to have the fastest growth rate in the MRD testing market, by product, during the forecast period.”

The MRD testing market is segmented into assay kits & reagents, and instruments

based on product. Assay kits & reagents are projected to account for the highest CAGR during the forecast period. One major driving factor is its higher accuracy of tests. Growing penetration of these tests in high-risk populations, continue to support increased demand. Favourable regulatory approvals and recommendations by various international health bodies, including the WHO, have also helped increase their adoption. Along with such factors, rising funding for research in cancer and advancements in diagnostics are also driving the high growth of the test kits segment in the MRD testing market.

“Haematological malignancies segment accounted for the highest growth rate in the MRD testing market, by application, during the forecast period.”

Based on application, the minimal residual disease testing market is segmented into hematological malignancies, solid tumors, and other applications. In 2021, the hematological malignancies application segment accounted for the largest share. Factors contributing to the growth of this segment are increasing incidences of leukemia, lymphoma and their types and awareness about continuous monitoring of patients with these diseases.

“Asia Pacific: The fastest-growing region in MRD testing market.”

The worldwide market for MRD testing is categorized into North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. Notably, the Asia Pacific region is anticipated to experience the most substantial growth in the forecast period. The Asia Pacific region bears a high burden of tuberculosis, such as in India and China, which record a high incidence rate and thereby drives the need for essential cancer screening and management. Growth in government and international organization funding and campaigns against cancer has also led to better access to diagnostics and healthcare infrastructure in Asia Pacific. Awareness among the communities and among healthcare workers regarding the need for early detection of cancer has also been significantly increasing the demand for further testing. Another major growth driver of this segment in the MRD testing market is the increasing healthcare expenditure, along with supportive regulatory frameworks. All these factors propel increased growth of the MRD testing market in the Asia Pacific region.

The break-up of the profile of primary participants in the MRD testing market:

By Company Type: Tier 1 - 55%, Tier 2 - 25%, and Tier 3 – 20%

By Designation: Managers - 30%, D-level - 50%, and Others - 20%

By Region: North America - 51%, Europe - 21%, Asia Pacific - 18%, Latin America – 6%, and Others - 4%

The key players in this market are F. Hoffmann-La Roche Ltd. (Switzerland), Labcorp Inc. (US), Guardant Health (US), Sysmex Corporation (Japan), NeoGenomics Laboratories, Inc. (US), Adaptive Biotechnologies Corporation (US), ArcherDX, Inc. (US), Asuragen Inc. (US), Arup Laboratories Inc. (US), Bio-Rad Laboratories, Inc. (US), Cergentis B.V. (Netherlands), Molecular MD (ICON plc) (Ireland), Invivoscribe, Inc. (US), Mission Bio, Inc. (US), Natera, Inc. (US), Opko Health, Inc. (US), Quest Diagnostics (US), and Genetron Health (China).

Research Coverage:

This research report categorizes the MRD testing market by product (assay kits & reagents, instruments), by technology (PCR, NGS, flow cytometry, and other applications), by application (hematological malignancies, solid tumors, multiple myeloma, and other applications), by end user (diagnostic laboratories, hospitals & clinics, academic & research institutes, and other end users), and region (North America, Europe, Asia Pacific, Latin America, Middle East & Africa and GCC Countries). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, opportunities, and challenges influencing the growth of the MRD testing market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, key strategies, acquisitions, and agreements. New product & service launches, and recent developments associated with the MRD testing market. Competitive analysis of upcoming startups in the MRD testing market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall MRD testing market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, opportunities, and challenges.

The report provides insights on the following pointers:

Analysis of key drivers (rising incidence of cancer, and increased funding and grants for cancer control programs), opportunities (Growth opportunities in emerging economies), restraints (Unfavorable reimbursement scenario), and challenges (changing regulatory landscape and operational barriers and labor shortage) influencing the growth of the MRD testing market.

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product launches in the MRD testing market.

Market Development: Comprehensive information about lucrative markets – the report analyses the MRD testing market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the MRD testing market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings of leading players like F. Hoffmann-La Roche Ltd. (Switzerland), Labcorp Inc. (US), Guardant Health (US), Sysmex Corporation (Japan), NeoGenomics Laboratories, Inc. (US), Adaptive Biotechnologies Corporation (US).

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