

Colorectal Cancer Screening and Diagnostic Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Screening (Stool-Based Test, Colonoscopy and Sigmoidoscopy, others), by Diagnostic (Biomarker Test, Colonoscopy), by End User (Hospitals and Clinics, Clinical Laboratories, others), by region, and Competition

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Abstracts

Global Colorectal Cancer Screening and Diagnostic Market has valued at USD 9.47 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 5.20% through 2028. Colorectal cancer, also known as colon cancer or rectal cancer, is a type of cancer that begins in the cells lining the large intestine (colon) or the rectum. It is one of the most common types of cancer worldwide. The exact cause of colorectal cancer is not always clear, but it often begins as benign growths called polyps in the inner lining of the colon or rectum. Over time, some of these polyps can become cancerous. Colorectal cancer typically develops through a series of genetic mutations that lead to uncontrolled cell growth. The rising incidence of colorectal cancer globally is a significant driver. As the disease becomes more prevalent, there is a greater need for screening and diagnostic tools to detect it in its early stages.

The establishment and promotion of colorectal cancer screening guidelines by healthcare authorities and professional organizations encourage individuals to undergo regular screening, driving market growth. Technological innovations in screening and diagnostic methods, such as improved imaging techniques, genetic testing, and blood-based biomarker assays, provide more accurate and convenient options for patients and healthcare providers. Public health campaigns and educational initiatives have raised awareness about colorectal cancer and the importance of early detection.

Increased awareness can lead to higher screening rates. Many governments worldwide have launched colorectal cancer screening programs, often targeting specific age groups or high-risk populations. These initiatives drive market demand. The availability of health insurance coverage for colorectal cancer screening tests encourages individuals to undergo screening, reducing the financial barrier to access.

Key Market Drivers

Advancements in Technology

High-definition (HD) colonoscopy uses advanced imaging technology to provide clearer and more detailed images of the colon. This improves the detection of precancerous polyps and early-stage colorectal cancer during colonoscopy procedures. CT colonography is a non-invasive imaging technique that uses computed tomography (CT) scans to create three-dimensional images of the colon. It offers an alternative to traditional colonoscopy and is less invasive, making it more patient-friendly.

Magnification endoscopy involves using specialized endoscopes that can magnify the colon's surface. This technology helps healthcare providers get a closer look at suspicious areas and enhances the detection of abnormalities. Narrow Band Imaging (NBI) is an endoscopic technology that uses specific wavelengths of light to enhance the visualization of blood vessels and surface structures in the colon. It aids in the detection of abnormalities that may not be visible with standard white light.

Chromoendoscopy involves applying contrast agents or dyes to the colon's surface during endoscopy. This highlights abnormal tissue and improves the detection of precancerous lesions. AI and machine learning algorithms are being developed to assist healthcare providers in analyzing colonoscopy and imaging data. These algorithms can help identify and characterize polyps and lesions, reducing the risk of missed diagnoses. Research is ongoing in the development of blood-based tests that detect specific biomarkers associated with colorectal cancer. These tests aim to provide a non-invasive and convenient screening option.

Stool-based tests like fecal immunochemical tests (FIT) and DNA stool tests have evolved with improved sensitivity and specificity. They detect blood or genetic mutations associated with colorectal cancer in stool samples. Advances in molecular diagnostics have led to the identification of genetic and molecular markers associated with colorectal cancer. These markers can be used for early detection and personalized treatment strategies. Liquid biopsies involve analyzing blood or other bodily fluids for circulating tumor DNA (ctDNA) or other biomarkers. They have the potential to detect colorectal cancer and monitor treatment response. Telemedicine allows for remote

consultations and discussions of colorectal cancer screening and diagnostic results. Telepathology enables pathologists to review tissue samples remotely, improving access to expertise. 3D printing technology has been used to create anatomical models of the colon and rectum, aiding in surgical planning and education for both patients and healthcare providers. Mobile apps and digital platforms are being developed to educate patients about colorectal cancer, remind them of screening appointments, and provide post-screening support. Data analytics and EHRs help healthcare providers track and manage patient screening histories, identify high-risk individuals, and improve overall healthcare management. This factor will help in the development of Global Colorectal Cancer Screening and Diagnostic Market.

Increasing Colorectal Cancer Incidence

Colorectal cancer is more common in older individuals, and as the population ages, there is a natural increase in the number of cases. The risk of developing colorectal cancer increases significantly after the age of 50. Demographic shifts, including population growth and changes in age distribution, can lead to a higher overall number of cancer cases, including colorectal cancer. Unhealthy lifestyle choices, such as diets high in processed foods, red meat, and low in fiber, along with sedentary behavior, obesity, and smoking, can increase the risk of colorectal cancer. Diets that are low in fruits, vegetables, and whole grains, which are rich in fiber and protective against colorectal cancer, contribute to the increasing incidence. The rise in obesity rates, particularly in developed countries, is associated with an increased risk of colorectal cancer. Lack of physical activity and sedentary behaviors are linked to an elevated risk of colorectal cancer. Excessive alcohol consumption is a known risk factor for colorectal cancer, and increased alcohol intake in some populations contributes to the rising incidence. Environmental factors, including exposure to certain toxins and pollutants, can contribute to an increased cancer risk. While most colorectal cancer cases are sporadic, there is a hereditary component to some cases. Genetic factors, family history, and certain inherited conditions can increase susceptibility. Despite the availability of effective screening methods, not all eligible individuals undergo regular colorectal cancer screening. This can lead to late-stage diagnoses and an increase in cases. Disparities in access to healthcare services, particularly in underserved communities or regions with limited healthcare infrastructure, can result in delayed diagnosis and treatment. In some cases, increased awareness and early detection efforts may lead to the identification of previously undiagnosed cases. This factor will pace up the demand of Global Colorectal Cancer Screening and Diagnostic Market.

Rising Awareness Campaigns

awareness campaigns provide essential information about colorectal cancer, including its risk factors, symptoms, and the value of early detection. Educated individuals are more likely to seek out screening options. These campaigns help dispel common myths and misconceptions about colorectal cancer, reducing fear and stigma associated with the disease. This, in turn, encourages more people to consider screening. Awareness campaigns often emphasize the importance of adhering to recommended screening guidelines. This helps individuals understand when they should start screening and which methods are suitable for them. Campaigns inform individuals about the various colorectal cancer screening methods available, such as colonoscopy, stool-based tests, and virtual colonoscopy. This information allows people to make informed choices based on their preferences and risk factors. Campaigns encourage individuals to discuss colorectal cancer screening with their healthcare providers. Open dialogues with healthcare professionals can lead to informed decisions about screening. By raising awareness about the importance of screening, these campaigns aim to boost screening rates, especially among those who may not have previously considered it. Awareness campaigns often target high-risk populations, such as those with a family history of colorectal cancer or specific genetic factors. By reaching these groups, campaigns can drive more targeted screening efforts.

Early detection of colorectal cancer is associated with better treatment outcomes. Awareness campaigns emphasize the benefits of catching the disease at an early, more treatable stage. Some individuals may face barriers to colorectal cancer screening, such as cost or lack of access to healthcare facilities. Awareness campaigns often address these barriers and provide information about available resources and assistance programs. By providing information and resources, awareness campaigns empower individuals to take control of their health and make informed decisions about their colorectal cancer screening and diagnostic needs. Awareness campaigns also provide support and resources for colorectal cancer survivors, helping them navigate post-treatment care and monitoring. Some awareness campaigns engage in advocacy efforts to promote policies that improve access to screening and reduce barriers. Awareness campaigns can have a global impact, raising awareness about colorectal cancer in regions where screening rates are low and encouraging governments and healthcare systems to invest in screening programs. This factor will accelerate the demand of Global Colorectal Cancer Screening and Diagnostic Market

Key Market Challenges

False Positives and Overdiagnosis

False positives occur when a screening test suggests the presence of colorectal cancer or precancerous lesions when they are not actually present. False positives can cause unnecessary anxiety and stress for patients. They often lead to additional testing and procedures, which can be invasive and carry their own risks. False positives can result in increased healthcare costs due to follow-up tests and procedures. This can strain healthcare resources and increase the financial burden on individuals and healthcare systems. Experiencing a false positive result can deter individuals from participating in future screening, as they may be apprehensive about undergoing another potentially stressful experience. Overdiagnosis occurs when a screening test detects a condition that, if left untreated, would not have progressed to clinical significance, or caused harm during the patient's lifetime. Overdiagnosis can lead to unnecessary treatment, including surgery, chemotherapy, or radiation therapy. These interventions can have physical and psychological side effects. Treating cases that would not have caused harm can lead to overtreatment, which poses risks to the patient's overall health and quality of life. Overdiagnosis and overtreatment contribute to higher healthcare costs. Resources are allocated to treating conditions that may not require intervention. Efforts are made to enhance the specificity of screening tests to reduce false positives. This includes refining the criteria for test positivity and adopting more accurate diagnostic criteria. Tailoring screening recommendations based on an individual's risk factors, such as family history and genetic predisposition, can help reduce overdiagnosis by targeting screening efforts where they are most needed.

Limited Screening Options in Developing Regions

Many developing regions lack the necessary healthcare infrastructure to support widespread colorectal cancer screening programs. This includes a shortage of healthcare facilities, trained professionals, and diagnostic equipment. Economic constraints in developing regions often limit the availability of funding for healthcare programs, including cancer screening. Screening tests, especially advanced ones, can be expensive, making them inaccessible to a large portion of the population. In many developing regions, there is a lack of awareness about colorectal cancer and the importance of screening. This leads to low demand for screening services and delays in diagnosis. Cultural beliefs and social stigmas can deter individuals from seeking colorectal cancer screening. Lack of education about the benefits of screening can also contribute to this issue. The procurement and distribution of screening tests and diagnostic equipment can be challenging in developing regions due to poor supply chain infrastructure and logistics issues. Developing regions often face a shortage of healthcare professionals, including oncologists and gastroenterologists, who can

perform and interpret screening tests.

Key Market Trends

Shift Towards Non-Invasive Tests

Non-invasive tests, such as stool-based tests or blood tests, are generally more acceptable to patients because they do not involve invasive procedures like colonoscopy. This improved patient acceptance can lead to higher screening participation rates. The avoidance of invasive procedures can reduce patient discomfort and anxiety associated with colorectal cancer screening. This can encourage individuals to undergo testing. Non-invasive tests often require minimal preparation and can be performed at home, making them more convenient for patients. This convenience can lead to higher compliance with screening recommendations. Unlike colonoscopy, which typically requires sedation or anesthesia, non-invasive tests do not involve the use of these medications, eliminating the associated risks and recovery time. Non-invasive tests are generally more cost-effective compared to invasive procedures like colonoscopy, making them an attractive option for both patients and healthcare systems. Some non-invasive tests, such as stool-based tests, can be performed more frequently, allowing for regular monitoring and early detection of changes in colorectal health. Non-invasive tests can be used to reach populations with limited access to healthcare facilities or those who may be hesitant to undergo invasive procedures. Advances in non-invasive screening technologies, such as the development of highly sensitive fecal immunochemical tests (FIT), have improved their ability to detect colorectal cancer and precancerous lesions.

Segmental Insights

Screening Insights

In 2022, the Global Colorectal Cancer Screening and Diagnostic Market largest share was held by Stool-Based Test segment and is predicted to continue expanding over the coming years. Stool-based tests are non-invasive and relatively easy to administer, making them more acceptable to many individuals who may be reluctant to undergo more invasive procedures like colonoscopy. This non-invasiveness can help increase overall screening rates. Stool-based tests are generally more cost-effective compared to colonoscopy or other imaging-based methods. This affordability can make them accessible to a larger portion of the population. Collecting a stool sample can be done in the privacy of one's home, and it doesn't require dietary restrictions or bowel

preparation, which is necessary for colonoscopy. This convenience encourages more people to participate in screening programs.

Diagnostics Insights

In 2022, the Global Colorectal Cancer Screening and Diagnostic Market dominated by Colonoscopy segment and is predicted to continue expanding over the coming years. Colonoscopy is considered the gold standard for colorectal cancer screening due to its high diagnostic accuracy. It allows for direct visualization of the entire colon and rectum, enabling the detection of precancerous polyps and early-stage cancers. Unlike some other screening methods, colonoscopy not only detects abnormalities but also enables the removal of precancerous polyps during the same procedure. This immediate intervention can prevent colorectal cancer from developing. Colonoscopy provides a comprehensive examination of the colon, allowing for the detection of abnormalities throughout the entire length of the colon, including the cecum, ascending colon, transverse colon, descending colon, and sigmoid colon. colonoscopy is typically recommended every 10 years for individuals at average risk of colorectal cancer, which means fewer screenings over time compared to annual or biennial stool-based tests. This makes it a convenient option for patients.

End User Insights

In 2022, the Global Colorectal Cancer Screening and Diagnostic Market largest share was dominated by Clinical Laboratories segment in the forecast period and is predicted to continue expanding over the coming years. Clinical laboratories are equipped with the necessary infrastructure and trained personnel to perform a wide range of diagnostic tests, including those related to colorectal cancer screening. They have the expertise to process and analyse samples accurately. Clinical laboratories offer a comprehensive suite of services, including various types of colorectal cancer screening tests such as fecal occult blood tests (FOBT), fecal immunochemical tests (FIT), and molecular tests. This wide range of services caters to diverse patient needs. Accredited clinical laboratories adhere to strict quality assurance standards and follow standardized protocols to ensure the accuracy and reliability of test results. This is essential for patient care and population health.

Regional Insights

The North America region dominates the Global Colorectal Cancer Screening and Diagnostic Market in 2022. North America has a relatively high prevalence of colorectal

cancer, which necessitates robust screening and diagnostic efforts. Factors such as diet, lifestyle, and an aging population contribute to this prevalence. The region has well-established colorectal cancer screening guidelines issued by healthcare authorities and professional organizations. These guidelines recommend regular screening starting at a certain age (usually around 50), contributing to a high screening rate. North America boasts advanced healthcare infrastructure, including a dense network of clinical laboratories, diagnostic facilities, and healthcare providers. This infrastructure supports efficient screening and diagnosis. A substantial portion of the population in North America is covered by health insurance, which often includes coverage for colorectal cancer screening and diagnostic tests. This coverage promotes higher screening rates.

Key Market Players

Clinical Genomics Technologies Pty Ltd.

Danaher Corporation

DiaCarta, Inc.

Eiken Chemical Co., Ltd.

Epigenomics AG

Freenome Holdings, Inc.

Guardant Health, Inc.

Lepu Medical Technology (Beijing) Co., Ltd.

Novigenix SA

FUJIFILM Holdings Corporation

Olympus Corporation

QuidelOrtho Corporation

Report Scope:

In this report, the Global Colorectal Cancer Screening and Diagnostic Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Colorectal Cancer Screening and Diagnostic Market, By Screening:

Stool-Based Test

Fecal Occult Blood Test (FOBT) and Fecal Immunochemical Test (FIT)

Stool DNA Test

Colonoscopy and Sigmoidoscopy

Others

Colorectal Cancer Screening and Diagnostic Market, By Diagnostics:

Biomarker Test

Colonoscopy

Colorectal Cancer Screening and Diagnostic Market, By End User:

Hospitals and Clinics

Clinical Laboratories

Others

Global Colorectal Cancer Screening and Diagnostic Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Colorectal Cancer Screening and Diagnostic Market.

Available Customizations:

Global Colorectal Cancer Screening and Diagnostic Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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17. STRATEGIC RECOMMENDATIONS

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