

Genomics in Cancer Care Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Instruments, Consumables, Services), By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others), By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research), By End User (Hospitals, Research Institutes & Academic Institutes, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Genomics in Cancer Care Market is anticipated to project impressive growth in the forecast period. Global Genomics in Cancer Care Market refers to the worldwide industry dedicated to the application of genomics, which is the study of an individual's genes and their interactions, in the field of cancer care. This market encompasses a range of products, services, and technologies aimed at understanding the genetic basis of cancer, diagnosing the disease, tailoring treatment plans, and monitoring patient outcomes.

Key Market Drivers

Personalized Medicine Revolution

The field of oncology is undergoing a transformative shift, thanks to the rise of

personalized medicine. This approach tailors medical treatment to individual patients based on their unique genetic makeup, and it holds enormous promise for Global Genomics in Cancer Care Market.

One of the most significant contributions of personalized medicine to the genomics in cancer care market is the ability to precisely target therapies. By analyzing the genetic mutations and alterations specific to a patient's cancer, clinicians can select treatments that are more likely to be effective. This reduces the reliance on broad-spectrum therapies, minimizing side effects and improving overall patient outcomes.

Personalized medicine allows for the customization of treatment plans. With a deeper understanding of a patient's genetic profile, healthcare providers can choose therapies that are more likely to attack the cancerous cells effectively. This, in turn, leads to better response rates and improved chances of remission.

Traditional cancer treatments, such as chemotherapy and radiation therapy, can have severe side effects. Personalized medicine minimizes these adverse effects by tailoring treatments to the individual's genetic makeup. This not only improves the quality of life for cancer patients but also encourages more individuals to seek treatment.

The revolution in personalized medicine extends to cancer prevention and early detection. Genetic testing can identify individuals at a higher risk of developing cancer, allowing for proactive interventions and lifestyle modifications. Additionally, identifying genetic markers associated with certain cancers can enable earlier detection, increasing the chances of successful treatment.

The development of targeted therapies and immunotherapies has been greatly accelerated by the insights provided by personalized medicine. Pharmaceutical companies are investing heavily in genomics research to identify new drug targets and develop treatments that align with a patient's genetic profile. This synergy between genomics and drug development bolsters market growth.

The growth of the personalized medicine revolution is intricately tied to advancements in genomic sequencing technologies. Next-generation sequencing (NGS) allows for the comprehensive analysis of an individual's genetic material, making it easier to identify actionable genetic changes. As sequencing technologies continue to improve and become more cost-effective, their adoption in clinical settings becomes increasingly viable.

Advancements in Genomic Sequencing

In the ever-evolving landscape of cancer care, genomic sequencing has emerged as a potent tool. As genomic technologies continue to advance, they are playing a pivotal role in shaping Global Genomics in Cancer Care Market.

Advancements in genomic sequencing, particularly Next-Generation Sequencing (NGS), have enabled comprehensive molecular profiling of cancer. This means that researchers and healthcare providers can analyze a patient's entire genome to identify mutations, alterations, and genetic markers associated with cancer. This depth of analysis provides a holistic view of the disease, facilitating more accurate diagnosis and tailored treatment strategies.

Genomic sequencing allows for the identification of specific genetic mutations driving a patient's cancer. This knowledge is invaluable in the development of targeted therapies. Pharmaceutical companies are leveraging genomic insights to create drugs that precisely target the genetic abnormalities responsible for cancer growth, increasing treatment effectiveness and reducing side effects.

Personalized medicine, based on genomic sequencing, has revolutionized cancer care. By analyzing a patient's genetic makeup, oncologists can tailor treatment plans to the individual, optimizing therapy selection and dosage. This approach not only improves patient outcomes but also enhances the overall quality of life during treatment.

Genomic sequencing isn't limited to treatment; it also plays a crucial role in early detection and prevention. Genetic testing can identify individuals with a higher risk of developing certain cancers, enabling early interventions and proactive health management. Additionally, screening for genetic markers associated with cancer allows for earlier diagnosis and intervention, increasing the chances of successful treatment.

The wealth of data generated through genomic sequencing is a goldmine for researchers and healthcare providers. Advanced data analytics and bioinformatics tools are being employed to interpret and extract meaningful insights from genomic data. This data-driven approach leads to more informed clinical decisions and supports ongoing research into new cancer therapies and diagnostic tools.

Advancements in genomic sequencing have driven down the cost of sequencing, making it more accessible for patients and healthcare providers. As sequencing becomes more affordable, its adoption in clinical settings becomes more widespread,

further fueling market growth.

Drug Development and Research

In the relentless battle against cancer, the integration of genomics into drug development and research has emerged as a powerful catalyst for progress. Global Genomics in Cancer Care Market is witnessing unprecedented growth, largely propelled by the synergistic relationship between genomics and drug discovery.

Genomics is transforming drug development by identifying novel drug targets. By scrutinizing the genetic mutations and alterations that underlie cancer, researchers can pinpoint specific genes or proteins that drive tumor growth. These targets become the foundation for the development of targeted therapies, which are often more effective and less toxic than traditional treatments.

The convergence of drug development and genomics has given rise to personalized medicine. Genetic profiling of patients helps identify individuals who are most likely to benefit from specific treatments. This approach not only maximizes therapeutic efficacy but also minimizes adverse effects, enhancing the overall patient experience.

Genomic data plays a pivotal role in the design and execution of precision medicine clinical trials. These trials focus on patient subpopulations with specific genetic characteristics, ensuring that the right patients receive the right treatments. As the scope of precision medicine trials expands, so does the demand for genomics in cancer care.

Biomarkers are crucial for patient stratification and treatment response monitoring. Genomic sequencing helps identify and validate biomarkers that predict how an individual will respond to a particular treatment. These biomarkers guide treatment decisions and contribute to more successful outcomes.

Genomics expedites drug development timelines. By understanding the genetic basis of cancer, researchers can more efficiently screen potential drug candidates and predict their efficacy in specific patient populations. This streamlined process reduces the time and resources required for drug development.

Immunotherapy, a groundbreaking approach to cancer treatment, has benefited immensely from genomics research. Understanding the genetic interactions between cancer cells and the immune system has led to the development of innovative

immunotherapies that harness the body's own defenses to combat cancer.

Companion Diagnostics

The integration of companion diagnostics into cancer care is heralding a new era in precision medicine. In this dynamic landscape, Global Genomics in Cancer Care Market is experiencing a substantial boost. Companion diagnostics, which determine a patient's suitability for a specific treatment based on their genetic profile, have emerged as a linchpin in the fight against cancer.

Companion diagnostics play a pivotal role in tailoring cancer treatments to individual patients. By analyzing a patient's genetic makeup, these diagnostics identify specific biomarkers or genetic alterations associated with their cancer. This enables oncologists to select the most appropriate therapies, optimizing treatment outcomes while minimizing unnecessary side effects.

The integration of companion diagnostics ensures that patients receive treatments that are more likely to be effective. This precision medicine approach improves response rates, increases the chances of tumor regression, and prolongs survival. Consequently, patients experience better clinical outcomes and an enhanced quality of life.

Traditional cancer treatments like chemotherapy can have debilitating side effects. Companion diagnostics reduce the likelihood of patients undergoing treatments that are unlikely to work for them. As a result, patients endure fewer adverse effects, making the treatment process more tolerable and less physically taxing.

Companion diagnostics provide invaluable information that guides clinical decision-making. They empower oncologists to make evidence-based treatment choices, ensuring that each patient's therapy aligns with the genetic characteristics of their cancer. This data-driven approach enhances the precision and efficacy of cancer care.

Companion diagnostics are instrumental in the development and application of targeted therapies. These therapies precisely target the genetic abnormalities driving a patient's cancer. As genomic research continues to uncover new therapeutic targets, the demand for companion diagnostics grows, propelling the genomics in cancer care market forward.

Companion diagnostics contribute to healthcare cost savings. By minimizing the use of ineffective treatments, unnecessary hospitalizations, and costly interventions, they

promote cost-effective healthcare delivery, making cancer care more accessible to a broader population.

Key Market Challenges

Cost and Accessibility

One of the most significant challenges facing genomics in the cancer care market is the high cost of genomic testing. While the price of sequencing has decreased over the years, it can still be prohibitively expensive for many patients, particularly in low- and middle-income countries. Ensuring that genomic testing is accessible to a broader population remains a critical challenge.

Data Privacy and Security

Genomic data is highly sensitive and can reveal a wealth of personal information about an individual. Maintaining strict data privacy and security measures is paramount. As the amount of genomic data generated and shared increases, safeguarding this information from breaches and misuse is an ongoing challenge.

Interoperability and Data Sharing

Effective data sharing and interoperability between healthcare systems, institutions, and countries are essential for maximizing the potential of genomics in cancer care. However, differing data standards, regulations, and privacy concerns can hinder seamless data exchange and collaboration.

Ethical and Legal Considerations

Genomic testing and research raise complex ethical and legal questions. Issues related to informed consent, the use of genetic information in insurance and employment decisions, and the potential for genetic discrimination must be addressed to ensure that patients' rights and interests are protected.

Key Market Trends

Liquid Biopsies and Early Detection

Liquid biopsies, a non-invasive method for detecting cancer-related genetic mutations

through blood samples, are set to become a game-changer. These tests allow for early cancer detection, monitoring of treatment responses, and identification of minimal residual disease. Liquid biopsies are expected to gain more prominence in routine cancer care.

Single-Cell Genomics

Single-cell genomics is a cutting-edge technology that allows researchers to analyze the genetic makeup of individual cells within a tumor. This offers a deeper understanding of tumor heterogeneity, which can lead to more precise treatment strategies and the development of therapies targeting specific cell populations.

Immunogenomics and Immunotherapy

Immunogenomics is the study of the genetic basis of the immune response to cancer. By integrating genomics and immunology, researchers are uncovering new biomarkers and therapeutic targets. This synergy will lead to the development of more effective immunotherapies, which harness the immune system to fight cancer.

Multi-Omic Approaches

Combining genomics with other 'omics' technologies such as transcriptomics, proteomics, and metabolomics will provide a holistic view of cancer biology. Multi-omic approaches will aid in understanding complex molecular interactions, identifying therapeutic vulnerabilities, and personalizing treatment plans.

Segmental Insights

Technology Insights

Based on the category of Technology, it is anticipated that the advancement in genome sequencing technology will serve as a catalyst for market expansion. Specifically, Next-Generation Sequencing, an innovative approach with broad applications in the field of oncology, plays a pivotal role. This technique involves the sequencing of DNA and RNA, facilitating the identification and examination of modifiers, mutations, and pharmacogenetics within biopsy samples.

Over time, DNA sequencing and related omics methodologies have been employed to investigate genetic abnormalities in human cancers. This exploration yields valuable

insights that enhance the precision of drug allocation to individual patients. In a research article published in the April 2022 issue of the Science journal, a collaborative effort between Cambridge University Hospitals (CUH) and the University of Cambridge scrutinized the entire genetic makeup, or whole-genome sequences (WGS), of more than 12,000 NHS cancer patients contributed by the 100,000 Genomes Project. This endeavor led to the discovery of 58 previously unidentified mutational signatures. Consequently, its advantages over alternative techniques are known to drive growth in the analyzed sector.

Additionally, the increasing influx of investments in research and development within the genomics sequencing sector is poised to propel market expansion. As an illustration, in March 2022, the UK government pledged a EUR 22 million investment for tailored genomic sequencing of 15,000 to 25,000 research participants hailing from diverse ancestry groups, who are currently underrepresented in genomic research. Coordinated by Genomics England, this initiative seeks to address healthcare disparities and enhance patient outcomes across all communities by advancing our understanding of genetic diversity and its implications for scientific, clinical, and healthcare system outcomes.

End User Insights

Hospitals are poised to assert a dominant presence in the Global Genomics in Cancer Care Market for several compelling reasons. Firstly, hospitals serve as primary hubs for patient diagnosis, treatment, and care, making them central to the integration of genomics into cancer management. Their access to diverse patient populations and clinical data repositories positions them as key players in the collection of genetic information crucial for personalized cancer therapies. Moreover, hospitals typically have the infrastructure and expertise necessary to facilitate complex genomic testing and analysis, ensuring accuracy and reliability in cancer genomics. Additionally, as cancer care increasingly relies on multidisciplinary teams of medical professionals, hospitals can leverage their existing healthcare ecosystems to streamline the incorporation of genomics into comprehensive cancer treatment plans. This synergy between clinical expertise and genomics capabilities places hospitals in a prime position to lead the way in advancing the global genomics landscape in cancer care.

Regional Insights

In the forecasted period, North America is anticipated to command a substantial portion of the global genomics in the cancer care market, and this trend is expected to persist

for the following years. This dominance can be attributed to several factors, including a higher incidence of cancer cases in the region, the presence of major industry players, and government and organizational initiatives focused on genomics in cancer care.

The region's significant market share is primarily driven by the escalating number of cancer cases within North America. According to data released by the American Cancer Society in January 2023, it is estimated that there will be approximately 1,958,310 new cancer diagnoses in the United States, with nearly 609,820 cancer-related deaths projected for 2023. This number is expected to rise during the forecast period, contributing to the market's growth trajectory.

Furthermore, governmental bodies such as the National Human Genome Research Institute in the United States (NHGRI) have been actively supporting research endeavors related to human genome sequencing, funding studies exploring the genome's structure, function, and its role in health and disease. These organizations also endorse investigations into the ethical, legal, and social aspects of genome research. For instance, in April 2021, the United States Administration announced a substantial USD 1.7 billion investment aimed at addressing COVID-19 variants, with USD 1 billion earmarked for the expansion of genomic sequencing and USD 400 million allocated for fostering innovative initiatives, including the establishment of new Centers of Excellence in genomic epidemiology. Additionally, the Biden Administration committed close to USD 200 million to boost genomic sequencing capacity to 29,000 samples per week by April 2021. Consequently, the collective efforts of government agencies, universities, academic and research institutions, as well as research establishments, in leveraging genomics to identify the underlying causes of cancer are expected to drive growth in this sector.

Key Market Players

Illumina Inc

Agilent Technologies, Inc.

Roche Diagnostics

Cancer Genetics, Inc.

Bio-Rad Laboratories Inc

Sigma-Aldrich Corp

QIAGEN NV

GE Healthcare Inc

Life Technologies Corp

Quest Diagnostics Inc

Report Scope:

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

Genomics in Cancer Care Market, By Product:

Instruments

Consumables

Services

Genomics in Cancer Care Market, By Technology:

Genome Sequencing

PCR

Microarray

Nucleic Acid Extraction and Purification

Others

Genomics in Cancer Care Market, By Application:

Diagnostics

Personalized Medicine

Drug Discovery & Development

Research

Genomics in Cancer Care Market, By End User:

Hospitals

Research Institutes & Academic Institutes

Others

Genomics in Cancer Care Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Genomics in Cancer Care Market.

Available Customizations:

Global Genomics in Cancer Care 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL GENOMICS IN CANCER CARE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Instruments, Consumables, Services)
 - 5.2.2. By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others)

- 5.2.3. By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research)
- 5.2.4. By End User (Hospitals, Research Institutes & Academic Institutes, Others)
- 5.2.5. By Region
- 5.2.6. By Company (2022)
- 5.3. Product Market Map
 - 5.3.1. By Product
 - 5.3.2. By Technology
 - 5.3.3. By Application
 - 5.3.4. By End User
 - 5.3.5. By Region

6. NORTH AMERICA GENOMICS IN CANCER CARE MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product (Instruments, Consumables, Services)
 - 6.2.2. By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others)
 - 6.2.3. By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research)
 - 6.2.4. By End User (Hospitals, Research Institutes & Academic Institutes, Others)
 - 6.2.5. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Genomics in Cancer Care Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product
 - 6.3.1.2.2. By Technology
 - 6.3.1.2.3. By Application
 - 6.3.1.2.4. By End User
 - 6.3.2. Canada Genomics in Cancer Care Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Technology

- 6.3.2.2.3. By Application
- 6.3.2.2.4. By End User
- 6.3.3. Mexico Genomics in Cancer Care Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Technology
 - 6.3.3.2.3. By Application
 - 6.3.3.2.4. By End User

7. EUROPE GENOMICS IN CANCER CARE MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Product (Instruments, Consumables, Services)
 - 7.2.2. By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others)
 - 7.2.3. By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research)
 - 7.2.4. By End User (Hospitals, Research Institutes & Academic Institutes, Others)
 - 7.2.5. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Genomics in Cancer Care Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Product
 - 7.3.1.2.2. By Technology
 - 7.3.1.2.3. By Application
 - 7.3.1.2.4. By End User
 - 7.3.2. United Kingdom Genomics in Cancer Care Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Product
 - 7.3.2.2.2. By Technology
 - 7.3.2.2.3. By Application

- 7.3.2.2.4. By End User
- 7.3.3. France Genomics in Cancer Care Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Product
 - 7.3.3.2.2. By Technology
 - 7.3.3.2.3. By Application
 - 7.3.3.2.4. By End User
- 7.3.4. Italy Genomics in Cancer Care Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Product
 - 7.3.4.2.2. By Technology
 - 7.3.4.2.3. By Application
 - 7.3.4.2.4. By End User
- 7.3.5. Spain Genomics in Cancer Care Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Product
 - 7.3.5.2.2. By Technology
 - 7.3.5.2.3. By Application
 - 7.3.5.2.4. By End User

8. ASIA-PACIFIC GENOMICS IN CANCER CARE MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Product (Instruments, Consumables, Services)
 - 8.2.2. By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others)
 - 8.2.3. By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research)
 - 8.2.4. By End User (Hospitals, Research Institutes & Academic Institutes, Others)
 - 8.2.5. By Country
- 8.3. Asia-Pacific: Country Analysis

- 8.3.1. China Genomics in Cancer Care Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Product
 - 8.3.1.2.2. By Technology
 - 8.3.1.2.3. By Application
 - 8.3.1.2.4. By End User
- 8.3.2. Japan Genomics in Cancer Care Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Product
 - 8.3.2.2.2. By Technology
 - 8.3.2.2.3. By Application
 - 8.3.2.2.4. By End User
- 8.3.3. India Genomics in Cancer Care Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Product
 - 8.3.3.2.2. By Technology
 - 8.3.3.2.3. By Application
 - 8.3.3.2.4. By End User
- 8.3.4. Australia Genomics in Cancer Care Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Product
 - 8.3.4.2.2. By Technology
 - 8.3.4.2.3. By Application
 - 8.3.4.2.4. By End User
- 8.3.5. South Korea Genomics in Cancer Care Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product
 - 8.3.5.2.2. By Technology
 - 8.3.5.2.3. By Application

8.3.5.2.4. By End User

9. SOUTH AMERICA GENOMICS IN CANCER CARE MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Product (Instruments, Consumables, Services)

9.2.2. By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others)

9.2.3. By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research)

9.2.4. By End User (Hospitals, Research Institutes & Academic Institutes, Others)

9.2.5. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Genomics in Cancer Care Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Product

9.3.1.2.2. By Technology

9.3.1.2.3. By Application

9.3.1.2.4. By End User

9.3.2. Argentina Genomics in Cancer Care Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Product

9.3.2.2.2. By Technology

9.3.2.2.3. By Application

9.3.2.2.4. By End User

9.3.3. Colombia Genomics in Cancer Care Market Outlook

9.3.3.1. Market Size & Forecast

9.3.3.1.1. By Value

9.3.3.2. Market Share & Forecast

9.3.3.2.1. By Product

9.3.3.2.2. By Technology

9.3.3.2.3. By Application

9.3.3.2.4. By End User

10. MIDDLE EAST AND AFRICA GENOMICS IN CANCER CARE MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product (Instruments, Consumables, Services)

10.2.2. By Technology (Genome Sequencing, PCR, Microarray, Nucleic Acid Extraction and Purification, Others)

10.2.3. By Application (Diagnostics, Personalized Medicine, Drug Discovery & Development, Research)

10.2.4. By End User (Hospitals, Research Institutes & Academic Institutes, Others)

10.2.5. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Genomics in Cancer Care Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Product

10.3.1.2.2. By Technology

10.3.1.2.3. By Application

10.3.1.2.4. By End User

10.3.2. Saudi Arabia Genomics in Cancer Care Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Product

10.3.2.2.2. By Technology

10.3.2.2.3. By Application

10.3.2.2.4. By End User

10.3.3. UAE Genomics in Cancer Care Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product

10.3.3.2.2. By Technology

10.3.3.2.3. By Application

10.3.3.2.4. By End User

10.3.4. Kuwait Genomics in Cancer Care Market Outlook

10.3.4.1. Market Size & Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share & Forecast

10.3.4.2.1. By Product

10.3.4.2.2. By Technology

10.3.4.2.3. By Application

10.3.4.2.4. By End User

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

12.1. Recent Development

12.2. Mergers & Acquisitions

12.3. Product Launches

13. PORTER'S FIVE FORCES ANALYSIS

13.1. Competition in the Industry

13.2. Potential of New Entrants

13.3. Power of Suppliers

13.4. Power of Customers

13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

14.1. Business Overview

14.2. Product Offerings

14.3. Recent Developments

14.4. Financials (As Reported)

14.5. Key Personnel

14.6. SWOT Analysis

14.6.1. Illumina Inc

14.6.2. Agilent Technologies, Inc.

14.6.3. Roche Diagnostics

- 14.6.4. Cancer Genetics, Inc.
- 14.6.5. Bio-Rad Laboratories Inc
- 14.6.6. Sigma-Aldrich Corp
- 14.6.7. QIAGEN NV
- 14.6.8. GE Healthcare Inc
- 14.6.9. Life Technologies Corp
- 14.6.10. Quest Diagnostics Inc

15. STRATEGIC RECOMMENDATIONS

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