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Next-Generation Cancer Diagnostics Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology (Next-generation Sequencing, qPCR & Multiplexing, Lab-on-a- chip (LOAC) & Reverse Transcriptase-PCR (RT-PCR), Protein Microarrays, DNA Microarrays), By Application (Biomarker Development, CTC Analysis, Proteomic Analysis, Epigenetic Analysis, Genetic Analysis), By Cancer Type (Lung Cancer, Breast Cancer, Colorectal Cancer, Cervical Cancer, Others), By Function (Therapeutic Monitoring, Companion Diagnostics, Prognostics, Cancer Screening, Risk Analysis), By Region, and By Competition

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Abstracts

Global Next-Generation Cancer Diagnostics Market has valued at USD 14.79 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.33% through 2028. The global next-generation cancer diagnostics market is a dynamic and rapidly evolving sector of the healthcare industry, driven by advancements in technology and a growing need for more accurate, efficient, and personalized cancer diagnosis and treatment.

Key Market Drivers

Technological Advancements

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The global next-generation cancer diagnostics market is on the cusp of transformation, thanks to the relentless march of technological advancements. Innovations in genomics, imaging, artificial intelligence, and molecular diagnostics are driving a paradigm shift in cancer diagnosis and care.

One of the most profound technological advancements shaping the future of cancer diagnostics is genomics. Next-generation sequencing (NGS) technologies have made it possible to analyze the entire DNA and RNA of cancer cells with incredible precision. By deciphering the genetic mutations and variations specific to a patient's tumor, oncologists can tailor treatments to target the root causes of the disease. This individualized approach is boosting the efficacy of cancer therapies, attracting both healthcare providers and investors to the next-generation diagnostics market.

Technological innovations in liquid biopsies have enabled non-invasive, early cancer detection. These tests can identify minute traces of cancer-related genetic material in bodily fluids, such as blood or urine. By detecting cancer at its earliest stages, patients have a better chance of successful treatment. Moreover, liquid biopsies are less invasive and more convenient for patients, making them an attractive option for cancer screening. The growth of this technology is opening new avenues for the market.

Next-generation imaging technologies are enhancing cancer diagnostics and treatment planning. Cutting-edge techniques, such as positron emission tomography (PET), magnetic resonance imaging (MRI), and multispectral imaging, provide incredibly detailed insights into tumors. Furthermore, radiomics, which involves extracting quantitative data from medical images, offers a treasure trove of information for oncologists. The use of artificial intelligence (AI) in radiomics is revolutionizing image analysis, allowing for faster and more accurate diagnosis. These advancements are driving the market's expansion.

Artificial intelligence and machine learning algorithms are proving to be game changers in cancer diagnostics. These technologies can analyze vast datasets, identify subtle patterns, and make predictions with exceptional accuracy. In the context of cancer diagnostics, AI is being used for image analysis, molecular profiling, and even drug discovery. AI-powered diagnostics are not only faster but also more precise, reducing the risk of misdiagnosis. The integration of AI into cancer diagnostics is attracting considerable investment and driving market growth.

The development of non-invasive biomarkers has significantly contributed to the growth

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of next-generation cancer diagnostics. These biomarkers, often detected in bodily fluids, provide insights into cancer without the need for invasive procedures like tissue biopsies. They are more patient-friendly and have become a crucial component of cancer diagnostics, accelerating market expansion.

Technological advancements have also improved our ability to manage and interpret vast amounts of data generated by next-generation diagnostics. Bioinformatics tools are essential for analyzing complex genomic and molecular data, and they play a pivotal role in identifying relevant biomarkers and therapeutic targets. As technology advances in data integration and bioinformatics, it simplifies the diagnostic process, facilitating better decision-making for clinicians and researchers.

Early Detection

Cancer continues to be a formidable global health challenge, and one of the keys to improving patient outcomes lies in early detection. Early detection can significantly boost the growth of the global next-generation cancer diagnostics market, revolutionizing the way we diagnose and treat this deadly disease.

The significance of detecting cancer at its earliest stages cannot be overstated. Early detection often translates into more effective treatment options, improved patient outcomes, and a higher likelihood of complete recovery. Late-stage cancer is not only more difficult and expensive to treat but also carries a higher risk of mortality. Next-generation cancer diagnostics are essential in identifying cancer before it progresses, making them a valuable asset for patients and healthcare providers.

Liquid biopsies, a hallmark of next-generation cancer diagnostics, are revolutionizing the field of early cancer detection. These tests involve the analysis of circulating tumor DNA (ctDNA) or other cancer-related materials found in bodily fluids, such as blood or urine. By identifying cancer-specific genetic mutations or biomarkers in a minimally invasive manner, liquid biopsies can detect cancer at its earliest, most treatable stages. The advent of liquid biopsies is driving market growth by making cancer screening more convenient and less invasive.

Advanced imaging technologies are another asset in early cancer detection. Cutting-edge methods such as magnetic resonance imaging (MRI), computed tomography (CT) scans, and positron emission tomography (PET) scans offer exceptional resolution, providing detailed insights into tumors. Early detection becomes more attainable as these technologies improve, and healthcare providers are increasingly investing in state-

of-the-art diagnostic equipment, boosting market growth.

Artificial intelligence and machine learning algorithms are enhancing the early detection of cancer by analyzing vast datasets and identifying subtle patterns that may escape human detection. AI is becoming an indispensable tool for radiologists and pathologists, aiding in the swift and accurate identification of early-stage cancers from images, tissue samples, or genetic data. The integration of AI not only accelerates the diagnostic process but also enhances the sensitivity and specificity of early detection methods.

Next-generation cancer diagnostics also rely on non-invasive biomarkers, which are critical in the early detection of cancer. These biomarkers can be identified in bodily fluids and offer a window into the patient's health without the need for invasive procedures such as tissue biopsies. By reducing patient discomfort and the risk of complications, non-invasive biomarkers are increasingly preferred for early cancer detection, further contributing to market growth.

The growth of the next-generation cancer diagnostics market is further supported by a shift toward patient-centric care. Patients are becoming more proactive about their health, seeking regular screenings and early detection methods to ensure they catch cancer at its nascent stage. Healthcare providers are aligning their services with this growing demand for early detection, making it a pivotal driver for the market.

Non-Invasive Testing

Cancer, one of the leading causes of death worldwide, has long posed a formidable challenge to healthcare systems. However, the emergence of non-invasive testing methods is fundamentally changing the way we approach cancer diagnosis and treatment. These technologies are not only enhancing patient comfort and safety but also catalyzing the growth of the global next-generation cancer diagnostics market.

Non-invasive testing methods have emerged as a game-changer in the world of cancer diagnostics. Traditionally, cancer diagnosis required invasive procedures like surgical biopsies, which can be uncomfortable, costly, and associated with potential complications. Non-invasive testing offers a more patient-friendly alternative, reducing discomfort and lowering the risks typically associated with cancer diagnosis. By eliminating the need for invasive tissue biopsies, these methods make cancer screening and monitoring more accessible and acceptable to patients.

At the forefront of non-invasive testing for cancer is the concept of liquid biopsies.

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These tests involve the analysis of various components found in bodily fluids, such as blood, urine, or cerebrospinal fluid. Liquid biopsies are a game-changer in the early detection of cancer. They can identify circulating tumor DNA (ctDNA), exosomes, and other cancer-related materials that are shed from tumors into the bloodstream. Liquid biopsies are particularly valuable for detecting cancer at an early, more treatable stage and for monitoring treatment response or disease progression.

Next-generation imaging technologies, such as magnetic resonance imaging (MRI), positron emission tomography (PET), and multispectral imaging, provide detailed insights into tumors and surrounding tissues without the need for surgical biopsies. Advanced imaging is a non-invasive way to visualize and characterize tumors, making it an essential component of the non-invasive cancer diagnostic approach.

Artificial intelligence (AI) and machine learning have become critical tools in non-invasive testing. AI algorithms can analyze images, molecular profiles, and genetic data to identify subtle patterns and biomarkers indicative of cancer. This not only expedites the diagnostic process but also enhances the sensitivity and specificity of non-invasive testing methods, ensuring accurate results.

Non-invasive testing has expanded the scope of cancer diagnostics. It is no longer limited to detecting cancer; these methods are now used for monitoring treatment response, identifying minimal residual disease, and assessing the risk of cancer recurrence. The versatility of non-invasive testing is attracting both healthcare providers and investors, further propelling market growth.

Comprehensive Profiling

The battle against cancer has taken a significant stride forward with the emergence of next-generation cancer diagnostics. At the forefront of this transformation is comprehensive profiling. This approach not only identifies the presence of cancer but also provides detailed insights into the genetic and molecular characteristics of the disease. Comprehensive profiling is driving the growth of the global next-generation cancer diagnostics market by enabling more precise diagnosis and tailored treatment.

Traditional cancer diagnostics often focus on confirming the presence of malignancies but may offer limited information about the underlying molecular factors that drive the disease. Comprehensive profiling, on the other hand, goes beyond mere confirmation. It provides a deeper understanding of the genetic mutations, gene expression patterns, and potential vulnerabilities of cancer, allowing clinicians to make more informed and

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personalized decisions regarding treatment.

At the heart of comprehensive profiling is genomic analysis. Next-generation sequencing (NGS) technologies have made it possible to sequence the entire DNA and RNA of cancer cells. This detailed genetic analysis enables the identification of specific genetic mutations, amplifications, deletions, and rearrangements unique to the patient's tumor. Genomic profiling guides clinicians in selecting the most appropriate therapies to target these specific genetic abnormalities.

Comprehensive profiling extends to transcriptomic analysis, which assesses gene expression patterns within cancer cells. This information is invaluable for understanding how genes function in the tumor, revealing potential drug targets and pathways that may be exploited for treatment. Transcriptomic profiling enhances the accuracy of diagnosis and aids in the development of tailored therapies.

The study of proteins is essential in comprehensive profiling. Proteomic analysis helps clinicians understand how proteins within cancer cells interact and behave. Aberrant protein signaling pathways can be targeted with precision, leading to more effective therapies. Proteomic profiling, along with genomic and transcriptomic data, provides a holistic view of cancer, empowering clinicians with a well-rounded understanding of the disease.

Comprehensive profiling is instrumental in the evolution of precision medicine. By characterizing the genetic and molecular profile of a patient's cancer, clinicians can develop highly targeted and personalized treatment plans. These tailored therapies have a higher likelihood of success and fewer adverse effects, making them a preferable option for both patients and healthcare providers.

Comprehensive profiling is not limited to initial diagnosis. It also plays a crucial role in monitoring treatment response and disease progression. By periodically profiling the tumor, clinicians can assess whether the cancer is responding to treatment or if it has developed resistance. This information enables timely adjustments to the treatment strategy, further enhancing patient care.

Key Market Challenges

High Development and Implementation Costs

The research and development of next-generation cancer diagnostics technologies are

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often costly and time-consuming. Companies must invest substantial resources in developing new diagnostic methods, acquiring advanced equipment, and conducting extensive clinical trials. These high initial costs can be a significant barrier to entry for smaller companies and may limit the development of innovative solutions.

The Need for Specialized Training

Healthcare professionals need to undergo specialized training to effectively utilize next-generation cancer diagnostics. Interpreting complex genetic, genomic, or proteomic data requires a certain level of expertise, which can be a barrier to widespread adoption. The need for continuing education and training places an additional burden on healthcare systems and institutions.

Ensuring Equal Access

One of the challenges facing the global market is ensuring equal access to next-generation cancer diagnostics. Disparities in access to advanced healthcare services can result in unequal health outcomes. Bridging these gaps and ensuring that patients from all backgrounds can benefit from these innovations is a priority, but it's an ongoing challenge.

Key Market Trends

Liquid Biopsies and Minimal Residual Disease Monitoring

Liquid biopsies have gained traction as a non-invasive method for early cancer detection. These tests, which analyze circulating tumor DNA and other cancer-related materials in bodily fluids, are becoming increasingly accurate and sensitive. Beyond early detection, liquid biopsies are being used to monitor minimal residual disease (MRD), allowing clinicians to track the progress of cancer treatment, identify relapse earlier, and adjust therapies accordingly.

Immunotherapy Biomarkers

A holistic understanding of cancer biology is now possible through multi-omics approaches. These methods combine genomics, transcriptomics, proteomics, and metabolomics to provide a comprehensive profile of a patient's cancer. The integration of multiple -omics data enables clinicians to develop highly personalized treatment plans and uncover the intricacies of cancer biology that were previously hidden.

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Point-of-Care Diagnostics

The development of portable and point-of-care diagnostic devices is revolutionizing cancer diagnostics. These technologies enable rapid, on-site testing, reducing the time and cost associated with sending samples to centralized laboratories. Point-of-care diagnostics are particularly valuable in resource-constrained settings and for the rapid assessment of cancer markers.

Segmental Insights

Technology Insights

Based on the category of Technology, next-generation sequencing (NGS) technology stood out in the 2022 market, claiming the largest share of revenue, and it's poised to exhibit the most rapid CAGR in the upcoming forecast period. This technology allows for the simultaneous examination of multiple genes and genetic variations, offering a comprehensive perspective on the genomic landscape. It plays a critical role in detecting various genetic alterations, including gene mutations, amplifications, deletions, and rearrangements, which are essential for precise diagnosis and personalized treatment selection.

In January 2023, QIAGEN forged an exclusive strategic partnership with Helix to advance NGS companion diagnostics in hereditary diseases. This collaboration capitalizes on the Helix Laboratory Platform, which harnesses QIAGEN's biopharma connections, NGS capabilities, and global regulatory expertise. The joint offering from this partnership is expected to be expedited through patient recruitment for the use of real-world evidence and the delivery of diagnostic solutions using NGS and PCR technologies.

The utilization of DNA and protein microarrays is projected to decline, primarily due to a favorable shift in preference towards NGS-based technology. Advancements in NGS systems, the development of library preparation procedures, and data interpretation tools have played a significant role in the increased adoption of NGS by research organizations. Prominent market analysts have also indicated that DNA microarrays will experience a substantial reduction in market share as NGS-based diagnostics establish dominance in the coming decade.

Cancer Type Insights

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Regarding cancer types, the 'other cancer' category took the lead in the next-generation cancer diagnostic market in 2022. This segment's supremacy is attributed to the increasing advancements in next-generation technologies, which have enabled more precise and comprehensive detection and profiling of various biomarkers associated with different cancer types. This includes the identification of specific genetic mutations, biomarkers, and molecular signatures linked to these cancers. The capability to accurately diagnose and monitor disease using advanced diagnostic tools is propelling market growth. Additionally, the growing emphasis on personalized medicine and targeted therapies for specific cancer types within the 'other cancer' category is further fueling the demand for advanced diagnostic solutions.

The breast cancer segment is projected to exhibit the swiftest CAGR over the forecast period. Breast cancer stands as one of the most prevalent cancer types worldwide, affecting a substantial number of individuals. The increasing incidence of breast cancer, coupled with heightened awareness and screening initiatives, contributes to the robust growth of this segment. Advances in diagnostic technologies and screening methodologies have led to enhanced detection and early diagnosis of breast cancer. This early identification enables timely intervention, more effective treatment, and improved patient outcomes. The adoption of advanced imaging techniques, such as mammography, ultrasound, and MRI, alongside the development of biomarker-based tests, has elevated the accuracy and efficiency of breast cancer diagnosis.

Regional Insights

North America held a dominant position in the market during 2022. This supremacy is attributed to the region's well-established healthcare infrastructure and strong commitment to cancer research. North America boasts advanced healthcare facilities, cutting-edge technologies, and a highly skilled workforce, facilitating the swift adoption and application of next-generation cancer diagnostics. Additionally, the region exhibits a higher prevalence of cancer and a larger patient pool compared to other regions. This larger patient population contributes to an increased demand for advanced diagnostic technologies, thus further propelling market growth.

The Asia Pacific region is projected to experience the most rapid CAGR over the forecast period, primarily owing to its large and expanding population, which leads to a higher prevalence of oncological conditions. The increasing prevalence of cancer fuels the need for advanced diagnostic technologies and acts as a driving force behind market expansion. Furthermore, there is a growing focus on enhancing healthcare

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infrastructure and extending access to high-quality healthcare services in numerous countries within the region. This emphasis results in the development of improved capabilities for cancer diagnosis and treatment, thereby promoting the adoption of next-generation cancer diagnostics.

The integration of enhanced healthcare systems in the region is a significant driver of market growth. For example, in August 2022, Australia launched the world's first preventive DNA screening for cancer and heart disease risk. This project, initiated by the Monash School of Public Health and Preventive Medicine, represents the inaugural DNA screening study for risk assessment. The study's objective is to screen a minimum of 10,000 individuals aged between 18 and 40 years. This integration supports the implementation of next-generation cancer diagnostics and is expected to further propel market growth.

Key Market Players

Janssen Pharmaceuticals Inc

Novartis AG

F Hoffmann-La Roche AG

Koninklijke Philips NV

Abbott Laboratories Inc

GE Healthcare Inc

Thermo Fisher Scientific Inc

Agilent Technologies Inc

Illumina Inc

QIAGEN NV

Report Scope:

In this report, the Global Next-Generation Cancer Diagnostics Market has been

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segmented into the following categories, in addition to the industry trends which have also been detailed below:

Next-Generation Cancer Diagnostics Market, By Technology:

Next-generation Sequencing

qPCR & Multiplexing

Lab-on- a- chip (LOAC) & Reverse Transcriptase-PCR (RT-PCR)

Protein Microarrays

DNA Microarrays

Next-Generation Cancer Diagnostics Market, By Application:

Biomarker Development

CTC Analysis

Proteomic Analysis

Epigenetic Analysis

Genetic Analysis

Next-Generation Cancer Diagnostics Market, By Cancer Type:

Lung Cancer

Breast Cancer

Colorectal Cancer

Cervical Cancer

Others

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Next-Generation Cancer Diagnostics Market, By Function:

Therapeutic Monitoring

Companion Diagnostics

Prognostics

Cancer Screening

Risk Analysis

Next-Generation Cancer Diagnostics Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

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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 Next-Generation Cancer Diagnostics Market.

Available Customizations:

Global Next-Generation Cancer Diagnostics 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

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

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