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South & Central America Colorectal Cancer Diagnostics Market Forecast to 2028 – COVID-19 Impact and Regional Analysis – by Modality [Imaging Tests (Colonoscopy, CT Colonography, Flexible Sigmoidoscopy, Capsule Endoscopy, and Others) and Stool-Based Tests (Faecal Immunochemical Test (FIT), Guaiac-Based Faecal Occult Blood Test, and Stool DNA Test)] and End User (Hospitals, Diagnostic Laboratories, Cancer Research Institutes, and Others)

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Abstracts

The South & Central America colorectal cancer diagnostics market was valued at US$ 749.13 million in 2023 and is expected to reach US$ 1,087.86 million by 2028. It is estimated to register a CAGR of 7.7% from 2023 to 2028.

Artificial Intelligence in Colonoscopy Drive South & Central America Colorectal Cancer Diagnostics Market

The early detection of colorectal cancer (CRC) in gastroenterology offers patients the best opportunity for disease-free and overall survival. However, colonoscopy results show significant variations in lesion detection. The adenoma detection rate (ADR) is the gold standard for evaluating the quality of colonoscopy performed by endoscopists for colorectal cancer screening.

The use of AI technology in diagnosing and treating several types of cancer, especially colorectal cancer, is now gaining substantial attention. Various AI-supporting systems are available for personalized and novel strategies for managing colorectal cancer. In

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endoscopy, AI broadly relates to a computer vision technology, allowing computers to “see” and interpret visual content. Through machine learning processes and deep learning, AI systems can be trained to recognize “normal” characteristics by linking gold standards to suitable images. Using computer vision for lesion detection will be the first application of AI in gastroenterology. It would help improve the quality of endoscopy practices in finding and recognizing polyps on colonoscopy.

Although AI in colonoscopy is a new field with an extended scope, it can potentially improve the quality of endoscopic examinations and patient care. It can also transform the process of managing performance and quality betterment in colonoscopy, alongside improving several key performance measures. Medtronic has launched its AI-powered GI Genius module for colonoscopy in India. This transformative solution that leans on deep learning algorithms and real-time data empowers physicians to detect and treat colorectal cancer by offering enhanced visualization during colonoscopy. AI applications such as the GI Genius can lead to an improved ADR, facilitating the earlier detection of colorectal cancer, better clinical management of lesions, and detailed characterization of tissues. Thus, the adoption of AI for colorectal cancer imaging tests is likely to bring new trends in the South & Central America colorectal cancer diagnostics market in the coming years.

South & Central America Colorectal Cancer Diagnostics Market Overview

The South & Central America colorectal cancer diagnostics market is segmented into Brazil, Argentina, and the Rest of South & Central America. According to the Brazilian Ministry of Health, cases of colon cancer have increased significantly due to the pesticides applied to the crops. Consumption of such food and water can lead to the development of colon cancer. In addition, the prevalence of colorectal cancer is higher among older adults. In 2020, around 55,102 new colorectal cancer cases were recorded in Brazil, as per Globocan 2020 data. In addition, 27,346 cases were reported in males and 27,756 in females. Awareness campaigns regarding colorectal cancer have grown across Brazil, especially from the private sector. The Brazilian Association of Intestinal Cancer Prevention (ABRAPRECI) and the Colorectal Cancer Prevention and Screening Program have been initiated. The growth in awareness campaigns and screening programs has increased the demand for colonoscopy services. In addition, in December 2020, a French diagnostic firm HalioDx signed an agreement with Diagnosticos da America (DASA) to distribute its Immunoscore colon cancer risk-assessment test in Brazil. Immunoscore assists in predicting the risk of relapse in early-stage colon cancer by measuring host immune responses at tumor sites, which helps plan treatment strategies. Under the agreement terms, in Brazil, Sao Paulo-based DASA has exclusive

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distribution rights to the test, offering it through 40 laboratory networks. Owing to the above-mentioned factors, the South & Central America colorectal cancer diagnostics market in Brazil is likely to witness lucrative opportunities during the forecast period.

South & Central America Colorectal Cancer Diagnostics Market Revenue and Forecast to 2028 (US$ Million)

South & Central America Colorectal Cancer Diagnostics Market Segmentation

The South & Central America colorectal cancer diagnostics market is segmented into modality, end user, and country.

Based on modality, the South & Central America colorectal cancer diagnostics market is bifurcated into imaging tests and stool-based tests. In 2023, the imaging tests segment held a larger share of the South & Central America colorectal cancer diagnostics market. The market for the imaging tests segment is further segmented into colonoscopy, ct colonography, flexible sigmoidoscopy, capsule endoscopy, and others. The market for the stool based tests segment is subsegmented into faecal immunochemical test (fit), guaiac-based faecal occult blood test (gfobt), and stool DNA test.

Based on end user, the South & Central America colorectal cancer diagnostics market is segmented into hospitals, diagnostic laboratories, cancer research institutes, and others. In 2023, the hospitals segment held the largest share of the South & Central America colorectal cancer diagnostics market.

Based on country, the South & Central America colorectal cancer diagnostics market is segmented into Brazil, Argentina, and Rest of South & Central America. In 2023, Brazil accounted for the largest share of the South & Central America colorectal cancer diagnostics market.

Medtronic Plc, Illumina Inc, F. Hoffmann-La Roche Ltd, Quest Diagnostics Inc, Siemens Healthineers AG, Bruker Corp.; and Eiken Chemical Co., Ltd. are the leading companies operating in the South & Central America colorectal cancer diagnostics market.

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