

Non-invasive Cancer Diagnostics Market Size, Share and Growth Outlook 2026: By Technology, By Cancer Type, By Sample Type, By End-User, Companies to 2034

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Abstracts

The global Non-invasive Cancer Diagnostics Market size is forecast to increase from \$88.08 Billion in 2026 to \$154.3 Billion in 2034 at a CAGR of 7.26% between 2026 and 2034.

The Non-invasive Cancer Diagnostics market report provides detailed analysis and outlook of Non-invasive Cancer Diagnostics segments including By Technology (Liquid Biopsy, Imaging Diagnostics, Molecular Diagnostics, Immunochemistry, Clinical Microbiology, Point of Care Test (POCT), Hematology), By Cancer Type (Lung Cancer, Breast Cancer, Colorectal Cancer, Blood Cancer, Solid Tumors, Prostate Cancer, Ovarian Cancer), By Sample Type (Blood, Urine, Saliva), By End-User (Diagnostic Centers, Hospitals, Research and Academic Institutes) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

Non-Invasive Cancer Diagnostics Industry Overview

Liquid Biopsy Technologies Are Transforming Cancer Detection and Monitoring

The non-invasive cancer diagnostics industry is experiencing rapid advancement as healthcare providers increasingly adopt blood-based testing technologies capable of detecting, characterizing, and monitoring cancer without the need for surgical or tissue-based biopsies. These diagnostic approaches utilize circulating tumor DNA, circulating tumor cells, epigenetic biomarkers, cell-free nucleic acids, and other molecular

signatures obtained from minimally invasive samples. Growing demand for earlier cancer detection, treatment personalization, disease monitoring, and recurrence surveillance is accelerating investment in liquid biopsy platforms and advanced molecular diagnostics. As precision oncology becomes a standard component of cancer care, non-invasive diagnostic technologies are playing an increasingly important role in guiding therapeutic decisions while reducing patient burden associated with conventional biopsy procedures.

Companion Diagnostics Are Expanding Clinical Adoption of Blood-Based Testing

Regulatory approvals continue to strengthen the clinical role of non-invasive cancer diagnostics. A major milestone was the FDA approval of Guardant360 CDx as a companion diagnostic for identifying ESR1 mutations in patients with advanced or metastatic breast cancer. The approval enables clinicians to select eligible patients for treatment with vepdegestrant using a simple blood sample rather than an invasive tissue biopsy. This development highlights a broader industry trend toward integrating liquid biopsy technologies directly into therapeutic decision-making pathways. As targeted oncology therapies continue to expand, blood-based companion diagnostics are becoming increasingly valuable for identifying actionable mutations, monitoring treatment response, and supporting precision medicine strategies across multiple cancer types.

Advanced Genomic and Epigenetic Profiling Is Expanding Diagnostic Capabilities

Innovation within the industry is extending beyond mutation detection toward comprehensive molecular characterization of cancer. NeoGenomics presented multiple scientific studies demonstrating improvements in minimal residual disease detection for hematologic malignancies as well as enhanced genomic profiling capabilities for solid tumors. These advancements support more sensitive disease monitoring and more precise treatment selection. Simultaneously, emerging technologies such as Epi-Liquidomics are broadening the scope of non-invasive diagnostics by analyzing circulating epigenetic signatures including DNA methylation patterns and chromatin fragmentation landscapes. This approach provides additional biological information beyond conventional mutation-based liquid biopsies and improves the ability to identify tissue-of-origin in patients with low tumor fractions. The combination of companion diagnostics, MRD monitoring, genomic profiling, and epigenetic analysis is strengthening the role of non-invasive cancer diagnostics across the entire oncology care continuum, from early detection and treatment selection to long-term disease surveillance.

Non-invasive Cancer Diagnostics Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Non-invasive Cancer Diagnostics market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Exact Sciences Corporation, Guardant Health, Inc., Illumina, Inc., F. Hoffmann-La Roche Ltd., Thermo Fisher Scientific Inc., QIAGEN N.V., Myriad Genetics, Inc., Agilent Technologies, Inc., Sysmex Corporation, Bio-Techne Corporation. The Non-invasive Cancer Diagnostics market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Non-invasive Cancer Diagnostics industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Non-invasive Cancer Diagnostics Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Non-invasive Cancer Diagnostics companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Non-invasive Cancer Diagnostics markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and long-term outlook

- Recent industry developments and news including mergers, acquisitions,

product launches, expansions, and company announcements

Non-invasive Cancer Diagnostics Market Competitive Benchmarking and Company Analysis

Leading companies in Non-invasive Cancer Diagnostics industry include- Exact Sciences Corporation, Guardant Health, Inc., Illumina, Inc., F. Hoffmann-La Roche Ltd., Thermo Fisher Scientific Inc., QIAGEN N.V., Myriad Genetics, Inc., Agilent Technologies, Inc., Sysmex Corporation, Bio-Techne Corporation. The Non-invasive Cancer Diagnostics market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Non-invasive Cancer Diagnostics Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Non-invasive Cancer Diagnostics market remains one of the strongest-performing segments in the country.

The US Non-invasive Cancer Diagnostics Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Non-invasive Cancer Diagnostics market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Non-invasive Cancer Diagnostics industry. On the medical device front, over 7,000 device manufacturers continue to gain from increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Non-invasive Cancer Diagnostics markets

Canada's strong Non-invasive Cancer Diagnostics sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Non-invasive Cancer Diagnostics market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Non-invasive Cancer Diagnostics Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Non-invasive Cancer Diagnostics market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Non-invasive Cancer Diagnostics population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Non-invasive Cancer Diagnostics industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Non-invasive Cancer Diagnostics market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Non-invasive Cancer Diagnostics sales through 2034

France Non-invasive Cancer Diagnostics companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease management initiatives, workforce reforms, and efforts to

improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

UK Non-invasive Cancer Diagnostics Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain

Small high-need consumer segments remain key priority of Non-invasive Cancer Diagnostics distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

China Non-invasive Cancer Diagnostics Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Non-invasive Cancer Diagnostics market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Non-invasive Cancer Diagnostics industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was 95%. Regional disparities in consumer spending trends continue to become more

pronounced in the Chinese Non-invasive Cancer Diagnostics industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Non-invasive Cancer Diagnostics Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Non-invasive Cancer Diagnostics market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Non-invasive Cancer Diagnostics market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Non-invasive Cancer Diagnostics Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria,

and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

Non-invasive Cancer Diagnostics Market Segmentation

By Technology

Liquid Biopsy

Imaging Diagnostics

Molecular Diagnostics

Immunochemistry

Clinical Microbiology

Point of Care Test (POCT)

Hematology

By Cancer Type

Lung Cancer

Breast Cancer

Colorectal Cancer

Blood Cancer

Solid Tumors

Prostate Cancer

Ovarian Cancer

By Sample Type

Blood

Urine

Saliva

By End-User

Diagnostic Centers

Hospitals

Research and Academic Institutes

Leading Companies in Non-invasive Cancer Diagnostics Industry (2026)

Exact Sciences Corporation

Guardant Health, Inc.

Illumina, Inc.

F. Hoffmann-La Roche Ltd.

Thermo Fisher Scientific Inc.

QIAGEN N.V.

Myriad Genetics, Inc.

Agilent Technologies, Inc.

Sysmex Corporation

Bio-Techne Corporation

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia, Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa, Other Africa

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Contents

CHAPTER 1- EXECUTIVE SUMMARY

- 1.1. Market Snapshot: Market Size, CAGR, and Growth Outlook to 2034
- 1.2. Key Industry Highlights, 2026
- 1.3. Premium Market Insights
 - 1.3.1. Potential Non-invasive Cancer Diagnostics Market Types and Applications
 - 1.3.2. Fastest Growing Countries Over the forecast period
- 1.4. Market Scope and Segmentation
 - 1.4.1. Key Market Segments
 - 1.4.2. Key Countries and Regions
 - 1.4.3. Top Companies in the Non-invasive Cancer Diagnostics Industry
- 1.5. Macroeconomic and Demographic Outlook
 - 1.5.1. GDP Outlook by Top 20 Countries, 2010- 2040
 - 1.5.2. Population Forecast by Country, 2010- 2040
 - 1.5.3. Inflation Trends in Leading Countries
- 1.6. Impact of Trade Policies, Regulations, and Sustainability
 - 1.6.1. Trade tariffs and localization requirements
 - 1.6.2. ESG and sustainability pressures
 - 1.6.3. Compliance-driven structural changes in the value chain

CHAPTER 2- RESEARCH METHODOLOGY

- 2.1. Report Coverage
- 2.2. Secondary Research
- 2.3. Primary Research
- 2.4. Data Triangulation
- 2.5. Market Modeling and Forecasting

CHAPTER 3- GLOBAL NON-INVASIVE CANCER DIAGNOSTICS MARKET TRENDS, GROWTH DRIVERS, CHALLENGES, AND OPPORTUNITIES THROUGH 2034

- 3.1. An Introduction to Global Non-invasive Cancer Diagnostics Markets in 2026
- 3.2. Global Historic and Forecast Non-invasive Cancer Diagnostics Market Size Outlook, USD Million, 2021- 2034
- 3.3. Annual Market Size Growth Rate (Y-o-Y), %, 2021-2034
- 3.4. Market Dynamics

3.4.1. Key Non-invasive Cancer Diagnostics Market Driving Forces and Their Impact on Market Outlook

3.4.2. Short and Long-Term Trends and Insights Shaping the Future

3.4.3. Potential Non-invasive Cancer Diagnostics Market Opportunities for Industry Stakeholders

3.4.4. Potential Challenges across Non-invasive Cancer Diagnostics Value Chain

CHAPTER 4- NON-INVASIVE CANCER DIAGNOSTICS MARKET COMPETITIVE LANDSCAPE, STRATEGIC ANALYSIS, AND VALUE CHAIN ASSESSMENT

4.1. Porter's Five Forces Analysis

4.1.1. Bargaining Power of Buyers

4.1.2. Bargaining Power of Suppliers

4.1.3. Threat of Substitutes

4.1.4. Threat of New Entrants

4.1.5. Intensity of Competitive Rivalry

4.1.6. Market Attractiveness Analysis by Segment

4.1.7. Market Attractiveness Analysis by Region

4.2. Competitive Landscape

4.2.1 Market Share Analysis of Leading Non-invasive Cancer Diagnostics Companies

4.2.2 Recent Strategic Developments

4.2.3 Mergers, Acquisitions, and Partnerships

4.2.4 Product Launches and Innovation Trends

4.2.5 Key Success Factors

4.3. Value Chain Analysis

4.3.1. Key Value Chain Segments

4.3.2. Dominant players by value-chain stage

4.4. SWOT Analysis

4.4.1. Key Strengths and Opportunities

4.4.2. Major Weaknesses and Threats

4.5 Technology Roadmap

4.6 Regulatory and Reimbursement Landscape

CHAPTER 5- NON-INVASIVE CANCER DIAGNOSTICS MARKET OUTLOOK BY SEGMENTS

5.1. Market Size Outlook by Type, USD Million, 2021- 2025 and 2026-2034

5.2. Market Size Outlook by Application, USD Million, 2021- 2025 and 2026-2034

5.3. Market Size Outlook by Country, USD Million, 2021- 2025 and 2026-2034

By Technology

Liquid Biopsy

Imaging Diagnostics

Molecular Diagnostics

Immunochemistry

Clinical Microbiology

Point of Care Test (POCT)

Hematology

By Cancer Type

Lung Cancer

Breast Cancer

Colorectal Cancer

Blood Cancer

Solid Tumors

Prostate Cancer

Ovarian Cancer

By Sample Type

Blood

Urine

Saliva

By End-User

Diagnostic Centers

Hospitals

Research and Academic Institutes

CHAPTER 6- SCENARIO ANALYSIS AND OUTLOOK

6.1. Base Case Scenario

6.1.1. Definitions and Insights

6.1.2. Market Size Outlook to 2034

6.2. Low Growth Case Scenario

6.2.1. Definitions and Insights

6.2.2. Market Size Outlook to 2034

6.3. High Growth Case Scenario

6.3.1. Definitions and Insights

6.3.2. Market Size Outlook to 2034

CHAPTER 7- NORTH AMERICA NON-INVASIVE CANCER DIAGNOSTICS MARKET SIZE ANALYSIS AND OUTLOOK

- 7.1. North America Non-invasive Cancer Diagnostics Market Overview, 2026
- 7.2. Leading Companies Operating in North America
- 7.3. Key Industry Statistics, 2026
- 7.4. North America Non-invasive Cancer Diagnostics Market Trends and Growth Opportunities to 2034
- 7.5. North America Non-invasive Cancer Diagnostics Market Size Outlook by Type
- 7.6. North America Non-invasive Cancer Diagnostics Market Size Outlook by Application
- 7.7. North America Non-invasive Cancer Diagnostics Market Size Outlook by Country
- 7.8. United States
 - 7.8.1. Key Statistics
 - 7.8.2. The US Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 7.8.3. Key Market Drivers and Industry Developments in the US Non-invasive Cancer Diagnostics Companies
- 7.9. Canada
 - 7.9.1. Key Statistics
 - 7.9.2. Canada Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 7.9.3. Key Market Drivers and Industry Developments in Canada Non-invasive Cancer Diagnostics Companies
- 7.10. Mexico
 - 7.10.1. Key Statistics
 - 7.10.2. Mexico Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 7.10.3. Key Market Drivers and Industry Developments in Mexico Non-invasive Cancer Diagnostics Companies

CHAPTER 8- EUROPE NON-INVASIVE CANCER DIAGNOSTICS MARKET SIZE ANALYSIS AND OUTLOOK

- 8.1. Europe Non-invasive Cancer Diagnostics Market Overview, 2026
- 8.2. Leading Companies Operating in Europe
- 8.3. Key Industry Statistics, 2026
- 8.4. Europe Non-invasive Cancer Diagnostics Market Trends and Growth Opportunities to 2034
- 8.5. Europe Non-invasive Cancer Diagnostics Market Size Outlook by Type
- 8.6. Europe Non-invasive Cancer Diagnostics Market Size Outlook by Application
- 8.7. Europe Non-invasive Cancer Diagnostics Market Size Outlook by Country
- 8.8. Germany
 - 8.8.1. Key Statistics

- 8.8.2. Germany Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
- 8.8.3. Key Market Drivers and Industry Developments in Germany Non-invasive Cancer Diagnostics Companies
- 8.9. France
 - 8.9.1. Key Statistics
 - 8.9.2. France Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 8.9.3. Key Market Drivers and Industry Developments in France Non-invasive Cancer Diagnostics Companies
- 8.10. United Kingdom
 - 8.10.1. Key Statistics
 - 8.10.2. United Kingdom Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 8.10.3. Key Market Drivers and Industry Developments in the UK Non-invasive Cancer Diagnostics Companies
- 8.11. Spain
 - 8.11.1. Key Statistics
 - 8.11.2. Spain Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 8.11.3. Key Market Drivers and Industry Developments in Spain Non-invasive Cancer Diagnostics Companies
- 8.12. Italy
 - 8.12.1. Key Statistics
 - 8.12.2. Italy Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 8.12.3. Key Market Drivers and Industry Developments in Italy Non-invasive Cancer Diagnostics Companies
- 8.13. Rest of Europe
 - 8.13.1. Key Statistics
 - 8.13.2. Rest of Europe Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 8.13.3. Key Market Drivers and Industry Developments in Rest of Europe Non-invasive Cancer Diagnostics Companies

CHAPTER 9- ASIA PACIFIC NON-INVASIVE CANCER DIAGNOSTICS MARKET SIZE ANALYSIS AND OUTLOOK

- 9.1. Asia Pacific Non-invasive Cancer Diagnostics Market Overview, 2026
- 9.2. Leading Companies Operating in Asia Pacific
- 9.3. Key Industry Statistics, 2026
- 9.4. Asia Pacific Non-invasive Cancer Diagnostics Market Trends and Growth Opportunities to 2034

- 9.5. Asia Pacific Non-invasive Cancer Diagnostics Market Size Outlook by Type
- 9.6. Asia Pacific Non-invasive Cancer Diagnostics Market Size Outlook by Application
- 9.7. Asia Pacific Non-invasive Cancer Diagnostics Market Size Outlook by Country
- 9.8. China
 - 9.8.1. Key Statistics
 - 9.8.2. China Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 9.8.3. Key Market Drivers and Industry Developments in China Non-invasive Cancer Diagnostics Companies
- 9.9. Japan
 - 9.9.1. Key Statistics
 - 9.9.2. Japan Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 9.9.3. Key Market Drivers and Industry Developments in Japan Non-invasive Cancer Diagnostics Companies
- 9.10. India
 - 9.10.1. Key Statistics
 - 9.10.2. India Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 9.10.3. Key Market Drivers and Industry Developments in India Non-invasive Cancer Diagnostics Companies
- 9.11. South Korea
 - 9.11.1. Key Statistics
 - 9.11.2. South Korea Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 9.11.3. Key Market Drivers and Industry Developments in South Korea Non-invasive Cancer Diagnostics Companies
- 9.12. Australia
 - 9.12.1. Key Statistics
 - 9.12.2. Australia Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 9.12.3. Key Market Drivers and Industry Developments in Australia Non-invasive Cancer Diagnostics Companies
- 9.13. Southeast Asia
 - 9.13.1. Key Statistics
 - 9.13.2. Southeast Asia Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 9.13.3. Key Market Drivers and Industry Developments in Southeast Asia Non-invasive Cancer Diagnostics Companies

CHAPTER 10- SOUTH AND CENTRAL AMERICA NON-INVASIVE CANCER DIAGNOSTICS MARKET SIZE ANALYSIS AND OUTLOOK

- 10.1. South and Central America Non-invasive Cancer Diagnostics Market Overview, 2026
- 10.2. Leading Companies Operating in South and Central America
- 10.3. Key Industry Statistics, 2026
- 10.4. South and Central America Non-invasive Cancer Diagnostics Market Trends and Growth Opportunities to 2034
- 10.5. South and Central America Non-invasive Cancer Diagnostics Market Size Outlook by Type
- 10.6. South and Central America Non-invasive Cancer Diagnostics Market Size Outlook by Application
- 10.7. South and Central America Non-invasive Cancer Diagnostics Market Size Outlook by Country
- 10.8. Brazil
 - 10.8.1. Key Statistics
 - 10.8.2. Brazil Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 10.8.3. Key Market Drivers and Industry Developments in Brazil Non-invasive Cancer Diagnostics Companies
- 10.9. Argentina
 - 10.9.1. Key Statistics
 - 10.9.2. Argentina Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 10.9.3. Key Market Drivers and Industry Developments in Argentina Non-invasive Cancer Diagnostics Companies
- 10.10. Rest of Latin America
 - 10.10.1. Key Statistics
 - 10.10.2. Rest of Latin America Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034
 - 10.10.3. Key Market Drivers and Industry Developments in Rest of Latin America Non-invasive Cancer Diagnostics Companies

CHAPTER 11- MIDDLE EAST AND AFRICA NON-INVASIVE CANCER DIAGNOSTICS MARKET SIZE ANALYSIS AND OUTLOOK

- 11.1. Middle East and Africa Non-invasive Cancer Diagnostics Market Overview, 2026
- 11.2. Leading Companies Operating in Middle East and Africa
- 11.3. Key Industry Statistics, 2026
- 11.4. Middle East and Africa Non-invasive Cancer Diagnostics Market Trends and Growth Opportunities to 2034
- 11.5. Middle East and Africa Non-invasive Cancer Diagnostics Market Size Outlook by Type

11.6. Middle East and Africa Non-invasive Cancer Diagnostics Market Size Outlook by Application

11.7. Middle East and Africa Non-invasive Cancer Diagnostics Market Size Outlook by Country

11.8. Saudi Arabia

11.8.1. Key Statistics

11.8.2. Saudi Arabia Non-invasive Cancer Diagnostics Market Size Outlook, 2021-2034

11.8.3. Key Market Drivers and Industry Developments in Saudi Arabia Non-invasive Cancer Diagnostics Companies

11.9. United Arab Emirates

11.9.1. Key Statistics

11.9.2. The UAE Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034

11.9.3. Key Market Drivers and Industry Developments in the UAE Non-invasive Cancer Diagnostics Companies

11.10. Africa

11.10.1. Key Statistics

11.10.2. Africa Non-invasive Cancer Diagnostics Market Size Outlook, 2021- 2034

11.10.3. Key Market Drivers and Industry Developments in Africa Non-invasive Cancer Diagnostics Companies

CHAPTER 12- COMPANY PROFILES

12.1. Top Companies in Non-invasive Cancer Diagnostics Industry

Exact Sciences Corporation

Guardant Health, Inc.

Illumina, Inc.

F. Hoffmann-La Roche Ltd.

Thermo Fisher Scientific Inc.

QIAGEN N.V.

Myriad Genetics, Inc.

Agilent Technologies, Inc.

Sysmex Corporation

Bio-Techne Corporation

12.2. Business Description

12.3. SWOT Profiles

12.4. Products and Services

CHAPTER 13- APPENDIX

Glossary of Terms

Research Methodology & Data Sources

Conclusion & Strategic Recommendations

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