

Precision Pathology For Cancer Market Size, Share and Growth Outlook 2026: By Type (Diagnostics, Therapeutics), By Technology, By Biomarker Type, By Cancer Type, By End User, Companies to 2034.

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Abstracts

The global Precision Pathology For Cancer Market size is forecast to increase from \$4.08 Billion in 2026 to \$7.7 Billion in 2034 at a CAGR of 8.26% between 2026 and 2034.

The Precision Pathology For Cancer market report provides detailed analysis and outlook of Precision Pathology For Cancer segments including By Type (Diagnostics, Therapeutics), By Technology (Next-Generation Sequencing (NGS), Digital Pathology, Molecular Diagnostics, Imaging Technologies, Fluorescence In Situ Hybridization (FISH)), By Biomarker Type (Genomic Biomarkers, Proteomic Biomarkers, Epigenomic Biomarkers), By Cancer Type (Breast Cancer, Lung Cancer (NSCLC), Colorectal Cancer, Prostate Cancer, Melanoma, Hematologic Malignancies), By End User (Hospitals and Cancer Centers, Diagnostic Laboratories, Pharmaceutical and Biotechnology Companies, Academic and Research 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.

Precision Pathology for Cancer Industry Overview

Artificial Intelligence, Digital Pathology, and Biomarker-Guided Oncology Are Reshaping Cancer Diagnostics

The Precision Pathology for Cancer industry is experiencing rapid evolution as advances in digital pathology, artificial intelligence, and biomarker-driven diagnostics

transform cancer detection, prognosis, and treatment selection. Oncology care is increasingly shifting toward precision medicine approaches that require highly accurate molecular and pathological characterization of tumors to guide targeted therapies. Healthcare providers, pharmaceutical companies, and diagnostic developers are investing heavily in integrated pathology platforms that combine immunohistochemistry, digital imaging, computational pathology, and predictive biomarker analysis to improve clinical decision-making and patient stratification.

Integrated Companion Diagnostics Are Accelerating Precision Oncology Adoption

One of the most important trends shaping the precision pathology market is the development of integrated companion diagnostic platforms designed to support targeted cancer therapies. Pharmaceutical and diagnostics companies are increasingly collaborating to create end-to-end pathology solutions that combine advanced imaging technologies with quantitative biomarker analysis. Reflecting this trend, Leica Biosystems expanded its collaboration with AstraZeneca and Daiichi Sankyo to develop a comprehensive TROP2 assessment platform for non-small cell lung cancer. By integrating immunohistochemistry assays, digital pathology systems, and AstraZeneca's Quantitative Continuous Scoring algorithm, the collaboration aims to improve the identification of patients most likely to benefit from targeted oncology therapies.

AI-Powered Pathology and Predictive Biomarkers Are Decentralizing Cancer Diagnostics

The precision pathology industry is also being transformed by advances in artificial intelligence and prognostic biomarker technologies that support personalized treatment decisions and decentralized diagnostic workflows. Hologic's Breast Cancer Index registry data demonstrated the growing clinical influence of predictive genomic testing, with physicians modifying extended endocrine therapy decisions for a substantial proportion of hormone receptor-positive breast cancer patients based on prognostic and predictive insights. At the same time, emerging companies such as Slideflow Labs are advancing AI-driven pathology platforms that enable healthcare institutions to develop and deploy cancer biomarkers internally, reducing reliance on external reference laboratories while improving prognostic assessment and recurrence prediction. These developments highlight the industry's broader transition toward AI-enabled, biomarker-driven, and institutionally integrated precision oncology diagnostics.

Precision Pathology For Cancer Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Precision Pathology For Cancer 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- NeoGenomics Laboratories, F. Hoffmann-La Roche Ltd., Agilent Technologies, Inc., Illumina, Inc., Thermo Fisher Scientific Inc., Guardant Health, Exact Sciences Corporation, QIAGEN N.V., Myriad Genetics, Inc., Sysmex Corporation. The Precision Pathology For Cancer 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 Precision Pathology For Cancer industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

Growth Precision Pathology For Cancer Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

Market Trends, Drivers, Potential Opportunities, and Challenges faced by Precision Pathology For Cancer 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 Precision Pathology For Cancer 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

Precision Pathology For Cancer Market Competitive Benchmarking and Company Analysis

Leading companies in Precision Pathology For Cancer industry include- NeoGenomics Laboratories, F. Hoffmann-La Roche Ltd., Agilent Technologies, Inc., Illumina, Inc., Thermo Fisher Scientific Inc., Guardant Health, Exact Sciences Corporation, QIAGEN N.V., Myriad Genetics, Inc., Sysmex Corporation. The Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer market remains one of the strongest-performing segments in the country.

The US Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer markets

Canada's strong Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Precision Pathology For Cancer 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 Precision Pathology For Cancer market outlook.

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

France Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years

China Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Precision Pathology For Cancer 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 Precision Pathology For Cancer 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 Precision Pathology For Cancer 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.

Precision Pathology For Cancer Market Segmentation

By Type

Diagnostics

Therapeutics

By Technology

Next-Generation Sequencing (NGS)

Digital Pathology

Molecular Diagnostics

Imaging Technologies

Fluorescence In Situ Hybridization (FISH)

By Biomarker Type

Genomic Biomarkers

Proteomic Biomarkers

Epigenomic Biomarkers

By Cancer Type

Breast Cancer

Lung Cancer (NSCLC)

Colorectal Cancer

Prostate Cancer

Melanoma

Hematologic Malignancies

By End User

Hospitals and Cancer Centers

Diagnostic Laboratories

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

Leading Companies in Precision Pathology For Cancer Industry (2026)

NeoGenomics Laboratories

F. Hoffmann-La Roche Ltd.

Agilent Technologies, Inc.

Illumina, Inc.

Thermo Fisher Scientific Inc.

Guardant Health

Exact Sciences Corporation

QIAGEN N.V.

Myriad Genetics, Inc.

Sysmex 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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Therapeutics

By Technology

Next-Generation Sequencing (NGS)

Digital Pathology

Molecular Diagnostics

Imaging Technologies

Fluorescence In Situ Hybridization (FISH)

By Biomarker Type

Genomic Biomarkers

Proteomic Biomarkers

Epigenomic Biomarkers

By Cancer Type

Breast Cancer

Lung Cancer (NSCLC)

Colorectal Cancer

Prostate Cancer

Melanoma

Hematologic Malignancies

By End User

Hospitals and Cancer Centers

Diagnostic Laboratories

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

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Agilent Technologies, Inc.

Illumina, Inc.

Thermo Fisher Scientific Inc.

Guardant Health

Exact Sciences Corporation

QIAGEN N.V.

Myriad Genetics, Inc.

Sysmex Corporation

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