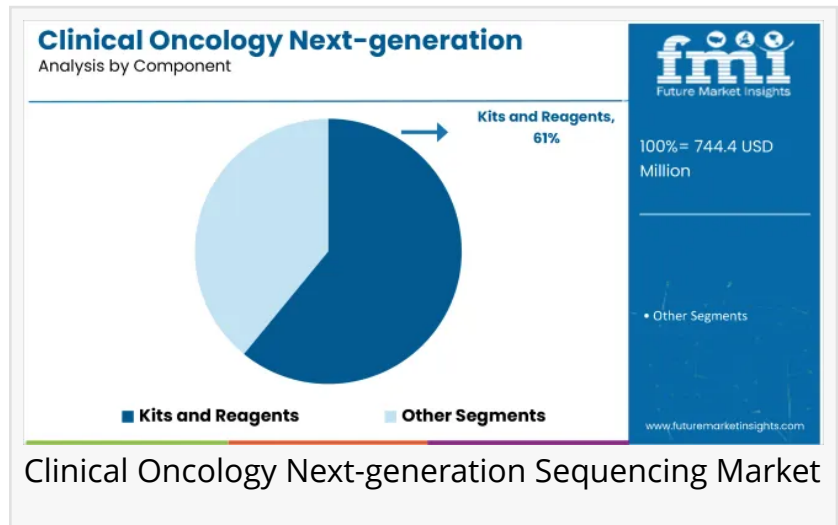


Clinical Oncology NGS Market to Surge Across USA, Europe, APAC & Saudi Arabia with 17.3% CAGR Through 2035

Clinical oncology NGS market to grow from USD 744.4M in 2025 to USD 3.13B by 2035, driven by precision medicine and rising global cancer incidence.

KY, UNITED STATES, November 7, 2025 /EINPresswire.com/ -- The global [clinical oncology next-generation sequencing \(NGS\) market](#) is positioned for major expansion, with the market valued at USD 744.4 million in 2025 and expected to reach USD 3.13 billion by 2035. This represents a robust compound annual growth rate (CAGR) of 17.3%, driven by the rising global cancer burden and the accelerating shift toward precision-based oncology care.



Cancer continues to be one of the leading causes of mortality globally, increasing the need for advanced diagnostic tools that allow clinicians to select the most effective and personalized treatment strategies. Next-generation sequencing plays a critical role in this shift, delivering detailed genomic insights that guide targeted therapies and immunotherapy decisions.

“

Text (Max 200 characters):
Advancements in NGS are reshaping global cancer care by enabling earlier detection, personalized therapies, and improved patient outcomes worldwide.”

Sabyasachi Ghosh

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Tumor Profiling and Liquid Biopsy Propel Market

Adoption

Among key application areas, tumor profiling remains the dominant segment, providing oncologists with actionable mutation data across a broad range of tumor types. This application

supports precision drug selection and is increasingly integrated into clinical workflows worldwide.

Liquid biopsy is also gaining rapid traction as a minimally invasive alternative to traditional biopsy methods. By analyzing cancer-derived material in blood, liquid biopsy enables earlier detection and real-time evaluation of treatment response. This trend is particularly strong in the United States and Europe, where demand for less invasive cancer monitoring approaches is rising.

Latest Product Advancements Shape Clinical Strategy

In May 2025, Illumina Inc. expanded its clinical oncology offerings with the TruSight™ (TSO) Comprehensive test—the first FDA-approved genomic profiling kit featuring pan-cancer companion diagnostic claims. The platform analyzes both DNA and RNA, enabling fast and comprehensive tumor characterization. The system is being adopted within community clinics, hospital networks, and academic research centers to support treatment personalization. Companies including Thermo Fisher Scientific and Roche are also leveraging AI-driven analytics to enhance sequencing workflows. Thermo Fisher's Genexus System integrates automated sequencing and analysis, enabling near real-time genomic reporting. Roche's NAVIFY ecosystem uses machine learning to correlate genomic findings with therapy recommendations, expediting clinical decision-making.

Regional Growth Outlook

- United States: The U.S. market is forecast to grow at a 19.4% CAGR through 2035, supported by national precision medicine initiatives and widespread adoption of clinical NGS in oncology practice.
- Europe: Europe is expected to generate significant revenues, led by France (21.6% CAGR) and Germany (19.1% CAGR), driven by strong public healthcare infrastructure and investment in cancer genomics research.
- Asia-Pacific: APAC markets, particularly China and Japan, are expanding rapidly as healthcare modernization and cancer screening programs intensify.
- Saudi Arabia & GCC: Increased healthcare digitization and rising cancer awareness are contributing to a steady increase in clinical NGS adoption across the Middle East.

Key Growth Factors

- Growing incidence of cancer worldwide
- Increasing demand for personalized, genomics-driven cancer therapies
- Technological advancements in sequencing sensitivity, speed, and data interpretation
- Rising public and private investment in cancer research and precision medicine
- Expansion of liquid biopsy diagnostic solutions for non-invasive cancer monitoring

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Challenges to Market Expansion

Despite strong momentum, challenges persist:

- High sequencing costs in emerging economies
- Regulatory complexities for diagnostic validation
- Need for standardized interpretation frameworks and clinician training

Ongoing technology refinement and expanded accessibility initiatives are expected to mitigate these barriers during the forecast period.

Key Companies in the Market

- Illumina Inc.
- Thermo Fisher Scientific Inc.
- Qiagen N.V.
- F. Hoffmann-La Roche Ltd.
- Pacific Biosciences of California, Inc.
- Oxford Nanopore Technologies Ltd.
- Agilent Technologies, Inc.
- BGI Group
- PerkinElmer, Inc.
- Bio-Rad Laboratories, Inc.

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