

# The 2025-2030 World Outlook for Biomarkers

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## Abstracts

This study covers the world outlook for biomarkers across more than 190 countries. For each year reported, estimates are given for the latent demand, or potential industry earnings (P.I.E.), for the country in question (in millions of U.S. dollars), the percent share the country is of the region, and of the globe. These comparative benchmarks allow the reader to quickly gauge a country vis-à-vis others. Using econometric models which project fundamental economic dynamics within each country and across countries, latent demand estimates are created. This report does not discuss the specific players in the market serving the latent demand, nor specific details at the product level. The study also does not consider short-term cyclicalities that might affect realized sales. The study, therefore, is strategic in nature, taking an aggregate and long-run view, irrespective of the players or products involved.

In this report we define the sales of biomarkers as including all commonly understood products falling within this broad category, irrespective of product packaging, formulation, size, or form. Companies participating in this industry include 454 Life Sciences, AB SCIEX, Abcodia, ABT Molecular Imaging, ACS Biomarker, Advanced Cell Diagnostics (ACD), Advion Bioanalytical Labs (part of Quintiles), Affymetrix, Agendia, Agilent, Alacris Theranostics, Alere, Amaranthus Biosciences, Amgen, Applied Biosystems (part of Life Technologies), Aptiv Solutions, Arctic Partners, Ariad Pharmaceuticals, Ariana Pharma, Arizona State University, Arrayit, ARUP Laboratories, AstraZeneca, Athena Diagnostics (a subsidiary of Quest Diagnostics), Atherotech Diagnostics Lab, Aushon BioSystem Inc. (U.S.), Axela, Inc., Axon Medchem, Bayer, Belfer Institute for Applied Cancer Science [US], Berkeley HeartLab (a subsidiary of Quest Diagnostics), BG Medicine, Biofortis, Bio-Rad, BioSims Technologies, Biosoft, BioVision, BRAHMS (part of Thermo Fisher Scientific), Brigham and Women's Hospital, Bristol-Myers Squibb, Bruker, Cancer Research Technology, Caprion Proteomics, CareDx, CBC (Comprehensive Biomarker Centre GMBH), Celera (part of Quest Diagnostics), Celgene, Cell Signaling Technology, CENTOGENE, Cephalon (part of

Teva), Charles River Laboratories, Chronix Biomedical, Chugai Pharmaceutical, CIPHERGEN Biosystems, Cisbio Bioassays, Clariant Diagnostic Services, Cleveland HeartLab, Clinigene International, Comprehensive Biomarker Center (formerly Febit), Covance, Crelux, Critical Diagnostics, CTI Biotech, Daiichi Sankyo, Dako (now part of Agilent), Dana-Farber Cancer Institute [US], Danaher, DaVita Labs, DiaGenic, Durin Technologies, DxS (now part of QIAGEN), Eisai Company, EKF Diagnostics Holdings, EKO Diagnostic, Eli Lilly, Enzo Biochem, Epic Sciences, Epigenomics, Epistem, EQT, Evotec, Exact Sciences, Exiqon, Exonhit, Ezose Sciences (part of Shionogi), F. Hoffmann-La Roche, FEI Company, F-Hoffman La Roche, Financila Performance, Foundation Medicine, Fujirebio Diagnostics, G.E. Healthcare Inc. (U.K), GE Healthcare, Genetic Technologies, Geneva Bioinformatics (GeneBio), Genomic Health, GenWay Biotech, GlaxoSmithKline, Great Point Partners, GSK, HD Biosciences, Health Diagnostic Laboratory, Helicos Biosciences, Hewlett-Packard, HTG Molecular Diagnostics, ICON, Illumina, Immunld, Insight Genetics, Institute of Pathology Heidelberg (IPH), Integrated Diagnostics, Ipsen, Ipsogen (a subsidiary of QIAGEN), Isogen Life Science, Johnson & Johnson, KU Leuven (University of Leuven), LabCorp, Life Diagnostics, LightArray Biotech, M2Gen, Mayo Clinic [US], MDxHealth, Medical Research Council [UK], MediMedia Pharma Solutions, Memorial Sloan-Kettering Cancer Center [US], Merck, Meso Scale Diagnostics, METABOLON, Michael J Fox Foundation, Myriad Genetics, National Academy of Sciences (NAS) [US], Nephromics, Nexus-Dx., Novartis, NovioGendix, Oncoimmune, Oncomedics, OpGen, OPKO Health, Orion Genomics, Oxford Cancer Biomarkers, Pacific Biomarkers, Panomics (now part of Affymetrix), Parexel, Patheon, Pathwork Diagnostics, PerkinElmer, Personal Genome Diagnostics, Pfizer, Pierre Fabre, PLUS Diagnostics, PMDA, Power3 Medical Products, PPD, Predictive Biosciences, Prometheus Laboratories, ProtagenAG, Proteome Sciences, Qiagen, QLIDA Diagnostics, Quanterix, Quanticel Pharmaceuticals, Quest Diagnostics, Quintiles, Randox Laboratories, Roche, SABiosciences (now part of QIAGEN), Sandor Proteomic, Sanger Institute, Sanofi, Santaris Pharma, Servier, Shionogi, Siemens, Signosis, Singulex, Sino Biological, Sividion Diagnostics, SMA Foundation [US], Stemina Biomarker Discovery, Sysmex, Technology Strategy Board (TSB) [UK], Teva Pharmaceutical Industries, Thallion Pharmaceuticals, The Biomarkers Consortium, Transgene, Trans-Hit Biomarkers, Tufts Center for the Study of Drug Development, Ventana Medical Systems, Vertex Pharmaceuticals, WaferGen, Warnex, Worldwide Clinical Trials, WuXi AppTec, and Xcovery. In addition to the sources indicated, additional information available to the public via news and/or press releases published by players in the industry was considered in defining and calibrating this category. All figures are in a common currency (U.S. dollars, millions) and are not adjusted for inflation (i.e., they are current values). Exchange rates used to convert to U.S. dollars are averages for the year in question. Future exchange rates are assumed

to be constant in the future at the current level (the average of the year of this publication's release in 2024).

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