

# The 2025-2030 World Outlook for Precision Medicines

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## Abstracts

This study covers the world outlook for precision medicines 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 precision medicines 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 23andMe, Ab-Biotics Sa, Abbott, Abcodia, ACS Biomarker, Actelion Pharmaceuticals, Advanced Biological Laboratories, Advaxis, Affymetrix, Agendia, Agenus, Alacer Corporation, Alberta Cancer Research Biobank, Alios BioPharma, Inc., Almac, Amgen, Apple, Archimedes, Aspen, Astellas Pharma, AstraZeneca, Astute Medical, Asuragen, AT&T, Athenahealth, Aurora, Auspex Pharmaceuticals, Avon Longitudinal Study of Parents and Children, Bayer, BGI Tech Solutions Company, Ltd., Biocrates Life Sciences, BioFortis, BioGene, Biomerieux, bioMérieux, BioNTech, Bioven International Sdn Bhd, Bode Technology group, Inc., Bristol-Myers Squibb, CareWell Urgent Care, Caris, Celera Diagnostics, Cell & Co Biorepository, Celtics Healthcare, Cepheid, Cetics Healthcare Technologies GmbH, CFR Pharmaceuticals, Ciba-Geigy, Clariant Diagnostic Services, Inc., Cognizant, Cooperative Human Tissue Network, Copan, Covance, Cubist Pharmaceuticals, CureVac, Daiichi Sankyo Company, Dako, Dell, Diabeter, Eagle Genomics, Ltd., Eli Lilly, Estonian Genome Project, F. Hoffmann-La Roche,

Ferrer InCode, Ferring Pharmaceuticals, Fisher BioServices, Flakka, Foundation Medicine, GE Healthcare, Genome Medicine, Genomic Health, GenoSpace, Gen-Probe, GlaxoSmithKline, Glooko, Google, Gritstone Oncology, Hologic, Human Tissue Resource Network, HUNT Biobank, IBM, Idera Pharmaceuticals, Illumina, Immatics Biotechnologies, Immuneering Corporation, Immunovative Therapies, Infectio Diagnostic, Inc., Institutional Biobank of Lausanne, Intel, Intomics, Janssen Biotech, Japan Post Group, Johnson & Johnson, Kaiser Permanente, Lab-Ally, Laboratory Corporation of America, LG, Life Technologies, Illumina, Luminex Molecular Diagnostics, Inc., Lutron Electronics, Mayo Clinic, Medpace, Medtronic, Merck, Moderna, Modul-Bio, Molecular Health, Monogram Bioscience, Myriad Genetic Laboratories, Nanosphere, NanoString, NantKwest, Neon Therapeutics, NextWave, Novartis, Omnyx, LLC, OncoMed Pharmaceuticals, Oncotype DX, OneMedNet Corporation, Oracle Healthcare, Panasonic Healthcare, PATH Biobank, Personalis, Pfizer, Philips Healthcare, ProMedDx, Q2 Solutions, Qiagen, Qualcomm, Quest Diagnostics, Randox Laboratories, Reddy Laboratories, Roche, Royal Philips, Samsung, Sandoz, Sanofi Aventis, Siemens Clinical Lab, Signature Diagnostics AG, St. Jude Medical (SJM), Sterand, PLC, Syapse, Sysmex, Takeda Pharmaceutical Company, Tepnel Pharma Services, Teva Pharmaceutical Industries, Therascreen, Thermo Fisher Scientific, Topera, Trofile, U.K. Biobank, UMass Cancer Center Tissue and Tumor Bank, Ventana Medical Systems, Veropharm, Vysis, and Zinfandel Pharmaceuticals. 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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