

Global Plasma p-Tau217 Assays for Alzheimer's Disease Market Growth 2026-2032

<https://marketpublishers.com/r/GD6F303535CFEN.html>

Date: October 2026

Pages: 137

Price: US\$ 3,660.00 (Single User License)

ID: GD6F303535CFEN

Abstracts

The global Plasma p-Tau217 Assays for Alzheimer's Disease market size is predicted to grow from US\$ 27.39 million in 2025 to US\$ 195 million in 2032; it is expected to grow at a CAGR of 27.7% from 2026 to 2032.

Plasma p-Tau217 Assays for Alzheimer's Disease are in vitro diagnostic and research-use reagents designed to quantitatively detect tau protein phosphorylated at threonine 217 in human plasma, primarily supporting the assessment of Alzheimer's disease-related amyloid pathology, patient stratification, clinical research and biomarker development. Commercial products are mainly implemented on automated chemiluminescence, electrochemiluminescence and ultrasensitive single-molecule immunoassay platforms, with standalone p-Tau217 quantitative assays representing the mainstream product form, while selected systems combine p-Tau217 with another biomarker to generate a clinically interpretable ratio. Key product parameters include analytical sensitivity, reportable range, sample volume, assay throughput and tests per reagent kit. The market is transitioning from research-focused ultrasensitive assays toward standardized clinical IVD products capable of deployment on high-throughput laboratory analyzers, allowing p-Tau217 measurement to move from specialized biomarker research into routine evaluation pathways for patients with cognitive impairment.

Key Findings

Clinical IVD adoption is shifting the market from specialty research laboratories toward routine automated immunoassay workflows

The competitive landscape combines global IVD platform leaders with rapidly expanding

Chinese clinical assay manufacturers

Market Trends

Plasma p-Tau217 Assays for Alzheimer's Disease are moving rapidly from specialized research applications toward standardized blood-based clinical testing. Product development is increasingly centered on automated, high-throughput immunoassay platforms that can be integrated into existing clinical laboratory workflows rather than dedicated research-only instruments. At the same time, assay sensitivity continues to improve through electrochemiluminescence, chemiluminescent enzyme immunoassay and single-molecule digital technologies. Another important direction is the shift from highly specialized memory-center testing toward broader cognitive assessment pathways, while manufacturers are also developing assay formats that can support patient triage, amyloid pathology assessment and pharmaceutical clinical trials. Increasing competition among large platform companies is expected to drive greater assay standardization and gradual declines in reagent pricing per test.

Market Dynamics

Drivers

Growth is primarily supported by increasing demand for less invasive Alzheimer's disease evaluation, the limitations of PET imaging and cerebrospinal fluid testing in large-scale clinical use, and accumulating clinical evidence supporting plasma p-Tau217 as a high-performing marker of amyloid-related pathology. Regulatory approvals since 2025 have accelerated the transition from research assays to clinical IVD products, while the expansion of disease-modifying anti-amyloid therapies is increasing the need for scalable patient identification and diagnostic workup. Existing installed bases of automated immunoassay analyzers also allow new p-Tau217 assays to be introduced without requiring laboratories to purchase entirely new diagnostic infrastructure.

Restraints

The market remains constrained by differences in assay calibration, antibodies, analytical platforms, clinical cutoffs and reporting methods across manufacturers. Reimbursement coverage and clinical adoption remain uneven among regions, while many physicians still rely on established diagnostic pathways involving specialist assessment, imaging and cerebrospinal fluid biomarkers. Clinical interpretation must

also consider age, renal function and other biological factors that may influence circulating biomarker concentrations. These factors limit immediate universal adoption despite strong analytical performance.

Opportunities

The largest medium-term opportunity lies in extending p-Tau217 testing from specialty memory clinics and clinical research centers into broader neurology and primary-care-supported cognitive assessment pathways. Additional opportunities are emerging in clinical trial prescreening, enrichment of amyloid-positive study populations and longitudinal biomarker research. China represents a particularly active supply-side opportunity because multiple domestic manufacturers have entered the clinical registration market across chemiluminescence, light-initiated chemiluminescence and single-molecule immunoassay technologies, creating conditions for lower testing costs and broader domestic adoption.

Challenges

Long-term commercialization depends on harmonizing results across platforms and establishing clinically accepted thresholds that remain robust across patient populations and care settings. Competition is likely to intensify as major IVD manufacturers leverage large installed analyzer bases, increasing pressure on smaller single-molecule and specialty assay companies. Manufacturers must also demonstrate that blood-based testing can be incorporated into clinical decision pathways without generating excessive false-positive referrals or unnecessary confirmatory procedures. Regulatory requirements for intended use, clinical performance and population validation will therefore remain significant barriers to widespread market entry.

Industry Chain Analysis

The upstream segment of the Plasma p-Tau217 Assays for Alzheimer's Disease industry consists primarily of highly specific monoclonal antibodies, recombinant antigens, magnetic microparticles, enzyme or chemiluminescent labels, calibrators, control materials and specialty assay consumables. Antibody specificity to the phosphorylated threonine-217 epitope and analytical sensitivity at very low plasma concentrations are critical determinants of assay performance and therefore represent high-value elements within the upstream supply chain.

The midstream segment consists of IVD reagent manufacturers and immunoassay platform providers that integrate antibodies, signal amplification chemistry, calibrators

and assay software into standardized commercial tests. Value creation increasingly depends on the ability to combine high analytical sensitivity with reproducible mass production and compatibility with installed automated analyzers. Downstream users include hospital laboratories, neurology and memory clinics, reference laboratories, clinical trial laboratories and pharmaceutical research organizations. As testing shifts from research to clinical workflows, downstream value is increasingly linked to laboratory accessibility, reimbursement, diagnostic algorithms and integration with confirmatory PET or cerebrospinal fluid testing.

Segment Insights

Standalone p-Tau217 quantitative assays currently represent the principal product format because they can be integrated directly into automated immunoassay platforms and provide a standardized concentration result. p-Tau217-based ratio assays form a smaller but clinically important segment, particularly where the combined biomarker result is used to improve amyloid pathology assessment. From a technology perspective, automated chemiluminescence and electrochemiluminescence methods are positioned for broader clinical deployment because of their compatibility with established high-throughput laboratory systems, while single-molecule digital immunoassays remain particularly important in ultrasensitive research, biomarker validation and selected clinical applications.

The competitive direction is therefore shifting from maximum analytical sensitivity alone toward a combined requirement for sensitivity, throughput, standardization and laboratory scalability. Products that can achieve clinically acceptable performance on widely installed analyzers are positioned to capture a growing share of routine diagnostic demand, while specialized digital platforms are likely to retain important roles in research and high-sensitivity applications.

Downstream Market Opportunities

The most immediate downstream opportunity is the evaluation of patients with objective cognitive impairment or persistent cognitive symptoms who require assessment of Alzheimer's disease-related amyloid pathology. Clinical trial screening is another important demand source because blood-based p-Tau217 can reduce dependence on PET or cerebrospinal fluid procedures during early-stage participant selection. Longer-term opportunities include longitudinal disease research and assessment of biomarker changes during disease-modifying treatment, although routine treatment-response monitoring remains less standardized than diagnostic use. Expansion into broader

cognitive-care pathways could substantially increase testing volumes if reimbursement, physician education and clinical guidelines continue to develop.

Regional Insights

North America is at the forefront of clinical commercialization, supported by FDA-cleared p-Tau217 blood-testing products, large reference laboratory networks and growing integration of blood biomarkers into Alzheimer's disease diagnostic pathways. Europe has a strong base of global IVD manufacturers and CE-marked products, while Japan benefits from established neurodegenerative biomarker platforms and major domestic suppliers. These developed markets are characterized by high laboratory automation and greater access to specialist neurological care.

China is emerging as one of the most active markets in terms of new product registrations and supplier expansion. A growing group of domestic manufacturers has introduced p-Tau217 assays using conventional chemiluminescence, light-initiated chemiluminescence and single-molecule technologies, increasing local supply depth and potential pricing competition. South Korea and China Taiwan have smaller but technologically relevant supplier bases, whereas Southeast Asia and India currently remain more dependent on imported platforms and laboratory service adoption.

Competitive Landscape Analysis

The competitive landscape is evolving from a research-led market toward a platform-driven clinical IVD market. Roche, Fujirebio and Beckman Coulter have established important positions in clinical commercialization, supported by installed automated analyzer bases and regulatory progress. Siemens Healthineers, Sysmex and Mindray represent major platform companies with the manufacturing scale and channel reach to accelerate future adoption, while Quanterix retains a strong position in ultrasensitive p-Tau217 research and biomarker development. In China, multiple domestic IVD manufacturers have secured clinical registrations, creating a more fragmented supplier structure than in the United States or Europe. Competition is increasingly determined by clinical validation, analyzer installed base, reagent manufacturing consistency, cost per test, regulatory coverage and the ability to integrate p-Tau217 into routine laboratory workflows rather than analytical sensitivity alone.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the "Plasma p-Tau217 Assays for

Alzheimer's Disease Industry Forecast" looks at past sales and reviews total world Plasma p-Tau217 Assays for Alzheimer's Disease sales in 2025, providing a comprehensive analysis by region and market sector of projected Plasma p-Tau217 Assays for Alzheimer's Disease sales for 2026 through 2032. With Plasma p-Tau217 Assays for Alzheimer's Disease sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Plasma p-Tau217 Assays for Alzheimer's Disease industry.

This Insight Report provides a comprehensive analysis of the global Plasma p-Tau217 Assays for Alzheimer's Disease landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Plasma p-Tau217 Assays for Alzheimer's Disease portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Plasma p-Tau217 Assays for Alzheimer's Disease market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Plasma p-Tau217 Assays for Alzheimer's Disease and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Plasma p-Tau217 Assays for Alzheimer's Disease.

This report presents a comprehensive overview, market shares, and growth opportunities of Plasma p-Tau217 Assays for Alzheimer's Disease market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Standalone p-Tau217 Quantitative Assays

p-Tau217-Based Ratio Assays

Other

Segmentation by Detection Technology:

Electrochemiluminescence Immunoassays

Chemiluminescent Enzyme Immunoassays

Acridinium Ester Chemiluminescence Immunoassays

Light-Initiated Chemiluminescence Immunoassays

Single-Molecule Digital Immunoassays

Other

Segmentation by Application:

Amyloid Pathology Assessment in Symptomatic Patients

Clinical Trial Screening and Patient Stratification

Longitudinal Disease and Therapeutic Response Research

Biomarker and Diagnostic Development Research

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Roche Diagnostics GmbH

Fujirebio Holdings, Inc.

Beckman Coulter, Inc.

Siemens Healthineers AG

Sysmex Corporation

Quanterix Corporation

Shenzhen Mindray Bio-Medical Electronics Co., Ltd.

Nanjing Vazyme Medical Technology Co., Ltd.

Beyond Biotech Shanghai Co., Ltd.

Innovita Biological Technology Co., Ltd.

Tellgen Corporation

iomics Biotech Co., Ltd.

Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi

Suzhou Yuce Biotechnology Co., Ltd.

Hunan Chaoji Testing Technology Co., Ltd.

Hunan Yonghe Sun Biotechnology Co., Ltd.

Beijing Kaixiang Hongkang Biotechnology Co., Ltd.

Guangdong Wesail Biotech Co., Ltd.

Shanghai Bojie Medical Technology Co., Ltd.

Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi

Key Questions Addressed in this Report

What is the 10-year outlook for the global Plasma p-Tau217 Assays for Alzheimer's Disease market?

What factors are driving Plasma p-Tau217 Assays for Alzheimer's Disease market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Plasma p-Tau217 Assays for Alzheimer's Disease market opportunities vary by end market size?

How does Plasma p-Tau217 Assays for Alzheimer's Disease break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

2.1.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for Plasma p-Tau217 Assays for Alzheimer's Disease by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for Plasma p-Tau217 Assays for Alzheimer's Disease by Country/Region, 2021, 2025 & 2032

2.2 Plasma p-Tau217 Assays for Alzheimer's Disease Segment by Type

2.2.1 Standalone p-Tau217 Quantitative Assays

2.2.2 p-Tau217-Based Ratio Assays

2.2.3 Other

2.2.4 Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type

2.2.4.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type (2021-2026)

2.2.4.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue and Market Share by Type (2021-2026)

2.2.4.3 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Type (2021-2026)

2.3 Plasma p-Tau217 Assays for Alzheimer's Disease Segment by Detection Technology

2.3.1 Electrochemiluminescence Immunoassays

2.3.2 Chemiluminescent Enzyme Immunoassays

2.3.3 Acridinium Ester Chemiluminescence Immunoassays

2.3.4 Light-Initiated Chemiluminescence Immunoassays

2.3.5 Single-Molecule Digital Immunoassays

2.3.6 Other

2.3.7 Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Detection Technology

2.3.7.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Detection Technology (2021-2026)

2.3.7.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue and Market Share by Detection Technology (2021-2026)

2.3.7.3 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Detection Technology (2021-2026)

2.4 Plasma p-Tau217 Assays for Alzheimer's Disease Segment by Application

2.4.1 Amyloid Pathology Assessment in Symptomatic Patients

2.4.2 Clinical Trial Screening and Patient Stratification

2.4.3 Longitudinal Disease and Therapeutic Response Research

2.4.4 Biomarker and Diagnostic Development Research

2.4.5 Other

2.4.6 Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application

2.4.6.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Market Share by Application (2021-2026)

2.4.6.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue and Market Share by Application (2021-2026)

2.4.6.3 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Breakdown Data by Company

3.1.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Sales by Company (2021-2026)

3.1.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Company (2021-2026)

3.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Revenue by Company (2021-2026)

3.2.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Company (2021-2026)

3.2.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Company (2021-2026)

3.3 Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Company

3.4 Key Manufacturers Plasma p-Tau217 Assays for Alzheimer's Disease Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Plasma p-Tau217 Assays for Alzheimer's Disease Product Location Distribution

3.4.2 Players Plasma p-Tau217 Assays for Alzheimer's Disease Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR PLASMA P-TAU217 ASSAYS FOR ALZHEIMER'S DISEASE BY GEOGRAPHIC REGION

4.1 World Historic Plasma p-Tau217 Assays for Alzheimer's Disease Market Size by Geographic Region (2021-2026)

4.1.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Plasma p-Tau217 Assays for Alzheimer's Disease Market Size by Country/Region (2021-2026)

4.2.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Sales by Country/Region (2021-2026)

4.2.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Revenue by Country/Region (2021-2026)

4.3 Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales Growth

4.4 APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales Growth

4.5 Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales Growth

4.6 Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales Growth

5 AMERICAS

5.1 Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country

5.1.1 Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country (2021-2026)

5.1.2 Americas Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Country (2021-2026)

5.2 Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type
(2021-2026)

5.3 Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application
(2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Region

6.1.1 APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Region
(2021-2026)

6.1.2 APAC Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Region
(2021-2026)

6.2 APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type
(2021-2026)

6.3 APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application
(2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Plasma p-Tau217 Assays for Alzheimer's Disease by Country

7.1.1 Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country
(2021-2026)

7.1.2 Europe Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Country
(2021-2026)

7.2 Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type
(2021-2026)

7.3 Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application
(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease by Country

8.1.1 Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country (2021-2026)

8.1.2 Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Country (2021-2026)

8.2 Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type (2021-2026)

8.3 Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Plasma p-Tau217 Assays for Alzheimer's Disease

10.3 Manufacturing Process Analysis of Plasma p-Tau217 Assays for Alzheimer's Disease

10.4 Industry Chain Structure of Plasma p-Tau217 Assays for Alzheimer's Disease

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Plasma p-Tau217 Assays for Alzheimer's Disease Distributors

11.3 Plasma p-Tau217 Assays for Alzheimer's Disease Customer

12 WORLD FORECAST REVIEW FOR PLASMA P-TAU217 ASSAYS FOR ALZHEIMER'S DISEASE BY GEOGRAPHIC REGION

12.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Market Size Forecast by Region

12.1.1 Global Plasma p-Tau217 Assays for Alzheimer's Disease Forecast by Region (2027-2032)

12.1.2 Global Plasma p-Tau217 Assays for Alzheimer's Disease Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Plasma p-Tau217 Assays for Alzheimer's Disease Forecast by Type (2027-2032)

12.7 Global Plasma p-Tau217 Assays for Alzheimer's Disease Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Roche Diagnostics GmbH

13.1.1 Roche Diagnostics GmbH Company Information

13.1.2 Roche Diagnostics GmbH Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.1.3 Roche Diagnostics GmbH Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Roche Diagnostics GmbH Main Business Overview

13.1.5 Roche Diagnostics GmbH Latest Developments

13.2 Fujirebio Holdings, Inc.

13.2.1 Fujirebio Holdings, Inc. Company Information

13.2.2 Fujirebio Holdings, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

- 13.2.3 Fujirebio Holdings, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 Fujirebio Holdings, Inc. Main Business Overview
- 13.2.5 Fujirebio Holdings, Inc. Latest Developments
- 13.3 Beckman Coulter, Inc.
 - 13.3.1 Beckman Coulter, Inc. Company Information
 - 13.3.2 Beckman Coulter, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
 - 13.3.3 Beckman Coulter, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Beckman Coulter, Inc. Main Business Overview
 - 13.3.5 Beckman Coulter, Inc. Latest Developments
- 13.4 Siemens Healthineers AG
 - 13.4.1 Siemens Healthineers AG Company Information
 - 13.4.2 Siemens Healthineers AG Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
 - 13.4.3 Siemens Healthineers AG Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Siemens Healthineers AG Main Business Overview
 - 13.4.5 Siemens Healthineers AG Latest Developments
- 13.5 Sysmex Corporation
 - 13.5.1 Sysmex Corporation Company Information
 - 13.5.2 Sysmex Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
 - 13.5.3 Sysmex Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Sysmex Corporation Main Business Overview
 - 13.5.5 Sysmex Corporation Latest Developments
- 13.6 Quanterix Corporation
 - 13.6.1 Quanterix Corporation Company Information
 - 13.6.2 Quanterix Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
 - 13.6.3 Quanterix Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Quanterix Corporation Main Business Overview
 - 13.6.5 Quanterix Corporation Latest Developments
- 13.7 Shenzhen Mindray Bio-Medical Electronics Co., Ltd.
 - 13.7.1 Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Company Information
 - 13.7.2 Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Plasma p-Tau217 Assays

for Alzheimer's Disease Product Portfolios and Specifications

13.7.3 Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Main Business Overview

13.7.5 Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Latest Developments

13.8 Nanjing Vazyme Medical Technology Co., Ltd.

13.8.1 Nanjing Vazyme Medical Technology Co., Ltd. Company Information

13.8.2 Nanjing Vazyme Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.8.3 Nanjing Vazyme Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Nanjing Vazyme Medical Technology Co., Ltd. Main Business Overview

13.8.5 Nanjing Vazyme Medical Technology Co., Ltd. Latest Developments

13.9 Beyond Biotech Shanghai Co., Ltd.

13.9.1 Beyond Biotech Shanghai Co., Ltd. Company Information

13.9.2 Beyond Biotech Shanghai Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.9.3 Beyond Biotech Shanghai Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Beyond Biotech Shanghai Co., Ltd. Main Business Overview

13.9.5 Beyond Biotech Shanghai Co., Ltd. Latest Developments

13.10 Innovita Biological Technology Co., Ltd.

13.10.1 Innovita Biological Technology Co., Ltd. Company Information

13.10.2 Innovita Biological Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.10.3 Innovita Biological Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Innovita Biological Technology Co., Ltd. Main Business Overview

13.10.5 Innovita Biological Technology Co., Ltd. Latest Developments

13.11 Tellgen Corporation

13.11.1 Tellgen Corporation Company Information

13.11.2 Tellgen Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.11.3 Tellgen Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Tellgen Corporation Main Business Overview

13.11.5 Tellgen Corporation Latest Developments

13.12 iomics Biotech Co., Ltd.

13.12.1 iomics Biotech Co., Ltd. Company Information

13.12.2 iomics Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.12.3 iomics Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 iomics Biotech Co., Ltd. Main Business Overview

13.12.5 iomics Biotech Co., Ltd. Latest Developments

13.13 Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi

13.13.1 Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Company Information

13.13.2 Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.13.3 Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Main Business Overview

13.13.5 Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Latest Developments

13.14 Suzhou Yuce Biotechnology Co., Ltd.

13.14.1 Suzhou Yuce Biotechnology Co., Ltd. Company Information

13.14.2 Suzhou Yuce Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.14.3 Suzhou Yuce Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Suzhou Yuce Biotechnology Co., Ltd. Main Business Overview

13.14.5 Suzhou Yuce Biotechnology Co., Ltd. Latest Developments

13.15 Hunan Chaoji Testing Technology Co., Ltd.

13.15.1 Hunan Chaoji Testing Technology Co., Ltd. Company Information

13.15.2 Hunan Chaoji Testing Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.15.3 Hunan Chaoji Testing Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Hunan Chaoji Testing Technology Co., Ltd. Main Business Overview

13.15.5 Hunan Chaoji Testing Technology Co., Ltd. Latest Developments

13.16 Hunan Yonghe Sun Biotechnology Co., Ltd.

13.16.1 Hunan Yonghe Sun Biotechnology Co., Ltd. Company Information

13.16.2 Hunan Yonghe Sun Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

13.16.3 Hunan Yonghe Sun Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Hunan Yonghe Sun Biotechnology Co., Ltd. Main Business Overview

13.16.5 Hunan Yonghe Sun Biotechnology Co., Ltd. Latest Developments

13.17 Beijing Kaixiang Hongkang Biotechnology Co., Ltd.

- 13.17.1 Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Company Information
- 13.17.2 Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
- 13.17.3 Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.17.4 Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Main Business Overview
- 13.17.5 Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Latest Developments
- 13.18 Guangdong Wesail Biotech Co., Ltd.
- 13.18.1 Guangdong Wesail Biotech Co., Ltd. Company Information
- 13.18.2 Guangdong Wesail Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
- 13.18.3 Guangdong Wesail Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.18.4 Guangdong Wesail Biotech Co., Ltd. Main Business Overview
- 13.18.5 Guangdong Wesail Biotech Co., Ltd. Latest Developments
- 13.19 Shanghai Bojie Medical Technology Co., Ltd.
- 13.19.1 Shanghai Bojie Medical Technology Co., Ltd. Company Information
- 13.19.2 Shanghai Bojie Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
- 13.19.3 Shanghai Bojie Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.19.4 Shanghai Bojie Medical Technology Co., Ltd. Main Business Overview
- 13.19.5 Shanghai Bojie Medical Technology Co., Ltd. Latest Developments
- 13.20 Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi
- 13.20.1 Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi Company Information
- 13.20.2 Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications
- 13.20.3 Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi Plasma p-Tau217 Assays for Alzheimer's Disease Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.20.4 Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi Main Business Overview
- 13.20.5 Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsi Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Plasma p-Tau217 Assays for Alzheimer's Disease Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Plasma p-Tau217 Assays for Alzheimer's Disease Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Standalone p-Tau217 Quantitative Assays

Table 4. Major Players of p-Tau217-Based Ratio Assays

Table 5. Major Players of Other

Table 6. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type (2021-2026) & (Units)

Table 7. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type (2021-2026)

Table 8. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Type (2021-2026) & (\$ million)

Table 9. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Type (2021-2026)

Table 10. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Type (2021-2026) & (US\$/Unit)

Table 11. Major Players of Electrochemiluminescence Immunoassays

Table 12. Major Players of Chemiluminescent Enzyme Immunoassays

Table 13. Major Players of Acridinium Ester Chemiluminescence Immunoassays

Table 14. Major Players of Light-Initiated Chemiluminescence Immunoassays

Table 15. Major Players of Single-Molecule Digital Immunoassays

Table 16. Major Players of Other

Table 17. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Detection Technology (2021-2026) & (Units)

Table 18. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Detection Technology (2021-2026)

Table 19. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Detection Technology (2021-2026) & (\$ million)

Table 20. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Detection Technology (2021-2026)

Table 21. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Detection Technology (2021-2026) & (US\$/Unit)

Table 22. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale by Application (2021-2026) & (Units)

Table 23. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Market Share by Application (2021-2026)

Table 24. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Application (2021-2026) & (\$ million)

Table 25. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Application (2021-2026)

Table 26. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Application (2021-2026) & (US\$/Unit)

Table 27. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Company (2021-2026) & (Units)

Table 28. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Company (2021-2026)

Table 29. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Company (2021-2026) & (\$ millions)

Table 30. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Company (2021-2026)

Table 31. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Price by Company (2021-2026) & (US\$/Unit)

Table 32. Key Manufacturers Plasma p-Tau217 Assays for Alzheimer's Disease Producing Area Distribution and Sales Area

Table 33. Players Plasma p-Tau217 Assays for Alzheimer's Disease Products Offered

Table 34. Plasma p-Tau217 Assays for Alzheimer's Disease Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 35. New Products and Potential Entrants

Table 36. Market M&A Activity & Strategy

Table 37. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Geographic Region (2021-2026) & (Units)

Table 38. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share Geographic Region (2021-2026)

Table 39. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 40. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Geographic Region (2021-2026)

Table 41. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country/Region (2021-2026) & (Units)

Table 42. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country/Region (2021-2026)

Table 43. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Country/Region (2021-2026) & (\$ millions)

Table 44. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Country/Region (2021-2026)

Table 45. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country (2021-2026) & (Units)

Table 46. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country (2021-2026)

Table 47. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Country (2021-2026) & (\$ millions)

Table 48. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type (2021-2026) & (Units)

Table 49. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application (2021-2026) & (Units)

Table 50. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Region (2021-2026) & (Units)

Table 51. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Region (2021-2026)

Table 52. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Region (2021-2026) & (\$ millions)

Table 53. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type (2021-2026) & (Units)

Table 54. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application (2021-2026) & (Units)

Table 55. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country (2021-2026) & (Units)

Table 56. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Country (2021-2026) & (\$ millions)

Table 57. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type (2021-2026) & (Units)

Table 58. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application (2021-2026) & (Units)

Table 59. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Country (2021-2026) & (Units)

Table 60. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Country (2021-2026)

Table 61. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Type (2021-2026) & (Units)

Table 62. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Application (2021-2026) & (Units)

Table 63. Key Market Drivers & Growth Opportunities of Plasma p-Tau217 Assays for

Alzheimer's Disease

Table 64. Key Market Challenges & Risks of Plasma p-Tau217 Assays for Alzheimer's Disease

Table 65. Key Industry Trends of Plasma p-Tau217 Assays for Alzheimer's Disease

Table 66. Plasma p-Tau217 Assays for Alzheimer's Disease Raw Material

Table 67. Key Suppliers of Raw Materials

Table 68. Plasma p-Tau217 Assays for Alzheimer's Disease Distributors List

Table 69. Plasma p-Tau217 Assays for Alzheimer's Disease Customer List

Table 70. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Region (2027-2032) & (Units)

Table 71. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 72. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Country (2027-2032) & (Units)

Table 73. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 74. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Region (2027-2032) & (Units)

Table 75. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 76. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Country (2027-2032) & (Units)

Table 77. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 78. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Country (2027-2032) & (Units)

Table 79. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 80. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Type (2027-2032) & (Units)

Table 81. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 82. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Forecast by Application (2027-2032) & (Units)

Table 83. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 84. Roche Diagnostics GmbH Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 85. Roche Diagnostics GmbH Plasma p-Tau217 Assays for Alzheimer's Disease

Product Portfolios and Specifications

Table 86. Roche Diagnostics GmbH Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 87. Roche Diagnostics GmbH Main Business

Table 88. Roche Diagnostics GmbH Latest Developments

Table 89. Fujirebio Holdings, Inc. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 90. Fujirebio Holdings, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 91. Fujirebio Holdings, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 92. Fujirebio Holdings, Inc. Main Business

Table 93. Fujirebio Holdings, Inc. Latest Developments

Table 94. Beckman Coulter, Inc. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 95. Beckman Coulter, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 96. Beckman Coulter, Inc. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 97. Beckman Coulter, Inc. Main Business

Table 98. Beckman Coulter, Inc. Latest Developments

Table 99. Siemens Healthineers AG Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 100. Siemens Healthineers AG Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 101. Siemens Healthineers AG Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 102. Siemens Healthineers AG Main Business

Table 103. Siemens Healthineers AG Latest Developments

Table 104. Sysmex Corporation Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 105. Sysmex Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 106. Sysmex Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 107. Sysmex Corporation Main Business

Table 108. Sysmex Corporation Latest Developments

Table 109. Quanterix Corporation Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 110. Quanterix Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 111. Quanterix Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 112. Quanterix Corporation Main Business

Table 113. Quanterix Corporation Latest Developments

Table 114. Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 115. Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 116. Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 117. Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Main Business

Table 118. Shenzhen Mindray Bio-Medical Electronics Co., Ltd. Latest Developments

Table 119. Nanjing Vazyme Medical Technology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 120. Nanjing Vazyme Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 121. Nanjing Vazyme Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 122. Nanjing Vazyme Medical Technology Co., Ltd. Main Business

Table 123. Nanjing Vazyme Medical Technology Co., Ltd. Latest Developments

Table 124. Beyond Biotech Shanghai Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 125. Beyond Biotech Shanghai Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 126. Beyond Biotech Shanghai Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 127. Beyond Biotech Shanghai Co., Ltd. Main Business

Table 128. Beyond Biotech Shanghai Co., Ltd. Latest Developments

Table 129. Innovita Biological Technology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 130. Innovita Biological Technology Co., Ltd. Plasma p-Tau217 Assays for

Alzheimer's Disease Product Portfolios and Specifications

Table 131. Innovita Biological Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 132. Innovita Biological Technology Co., Ltd. Main Business

Table 133. Innovita Biological Technology Co., Ltd. Latest Developments

Table 134. Tellgen Corporation Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 135. Tellgen Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 136. Tellgen Corporation Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 137. Tellgen Corporation Main Business

Table 138. Tellgen Corporation Latest Developments

Table 139. iomics Biotech Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 140. iomics Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 141. iomics Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 142. iomics Biotech Co., Ltd. Main Business

Table 143. iomics Biotech Co., Ltd. Latest Developments

Table 144. Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 145. Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 146. Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 147. Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Main Business

Table 148. Youdi Shengwu Jishu Shijiazhuang Youxian Gongsi Latest Developments

Table 149. Suzhou Yuce Biotechnology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 150. Suzhou Yuce Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 151. Suzhou Yuce Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 152. Suzhou Yuce Biotechnology Co., Ltd. Main Business

Table 153. Suzhou Yuce Biotechnology Co., Ltd. Latest Developments

Table 154. Hunan Chaoji Testing Technology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 155. Hunan Chaoji Testing Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 156. Hunan Chaoji Testing Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 157. Hunan Chaoji Testing Technology Co., Ltd. Main Business

Table 158. Hunan Chaoji Testing Technology Co., Ltd. Latest Developments

Table 159. Hunan Yonghe Sun Biotechnology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 160. Hunan Yonghe Sun Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 161. Hunan Yonghe Sun Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 162. Hunan Yonghe Sun Biotechnology Co., Ltd. Main Business

Table 163. Hunan Yonghe Sun Biotechnology Co., Ltd. Latest Developments

Table 164. Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 165. Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 166. Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 167. Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Main Business

Table 168. Beijing Kaixiang Hongkang Biotechnology Co., Ltd. Latest Developments

Table 169. Guangdong Wesail Biotech Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 170. Guangdong Wesail Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 171. Guangdong Wesail Biotech Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 172. Guangdong Wesail Biotech Co., Ltd. Main Business

Table 173. Guangdong Wesail Biotech Co., Ltd. Latest Developments

Table 174. Shanghai Bojie Medical Technology Co., Ltd. Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 175. Shanghai Bojie Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 176. Shanghai Bojie Medical Technology Co., Ltd. Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 177. Shanghai Bojie Medical Technology Co., Ltd. Main Business

Table 178. Shanghai Bojie Medical Technology Co., Ltd. Latest Developments

Table 179. Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsì Basic Information, Plasma p-Tau217 Assays for Alzheimer's Disease Manufacturing Base, Sales Area and Its Competitors

Table 180. Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsì Plasma p-Tau217 Assays for Alzheimer's Disease Product Portfolios and Specifications

Table 181. Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsì Plasma p-Tau217 Assays for Alzheimer's Disease Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 182. Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsì Main Business

Table 183. Shenzhen Shi Guang Yu Shengwu Keji Youxian Gongsì Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Plasma p-Tau217 Assays for Alzheimer's Disease
- Figure 2. Plasma p-Tau217 Assays for Alzheimer's Disease Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Growth Rate 2021-2032 (Units)
- Figure 7. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country/Region (2025)
- Figure 10. Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Standalone p-Tau217 Quantitative Assays
- Figure 12. Product Picture of p-Tau217-Based Ratio Assays
- Figure 13. Product Picture of Other
- Figure 14. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type in 2026
- Figure 15. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of Electrochemiluminescence Immunoassays
- Figure 17. Product Picture of Chemiluminescent Enzyme Immunoassays
- Figure 18. Product Picture of Acridinium Ester Chemiluminescence Immunoassays
- Figure 19. Product Picture of Light-Initiated Chemiluminescence Immunoassays
- Figure 20. Product Picture of Single-Molecule Digital Immunoassays
- Figure 21. Product Picture of Other
- Figure 22. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Detection Technology in 2026
- Figure 23. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Detection Technology (2021-2026)
- Figure 24. Plasma p-Tau217 Assays for Alzheimer's Disease Consumed in Amyloid Pathology Assessment in Symptomatic Patients
- Figure 25. Global Plasma p-Tau217 Assays for Alzheimer's Disease Market: Amyloid

Pathology Assessment in Symptomatic Patients (2021-2026) & (Units)

Figure 26. Plasma p-Tau217 Assays for Alzheimer's Disease Consumed in Clinical Trial Screening and Patient Stratification

Figure 27. Global Plasma p-Tau217 Assays for Alzheimer's Disease Market: Clinical Trial Screening and Patient Stratification (2021-2026) & (Units)

Figure 28. Plasma p-Tau217 Assays for Alzheimer's Disease Consumed in Longitudinal Disease and Therapeutic Response Research

Figure 29. Global Plasma p-Tau217 Assays for Alzheimer's Disease Market: Longitudinal Disease and Therapeutic Response Research (2021-2026) & (Units)

Figure 30. Plasma p-Tau217 Assays for Alzheimer's Disease Consumed in Biomarker and Diagnostic Development Research

Figure 31. Global Plasma p-Tau217 Assays for Alzheimer's Disease Market: Biomarker and Diagnostic Development Research (2021-2026) & (Units)

Figure 32. Plasma p-Tau217 Assays for Alzheimer's Disease Consumed in Other

Figure 33. Global Plasma p-Tau217 Assays for Alzheimer's Disease Market: Other (2021-2026) & (Units)

Figure 34. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sale Market Share by Application (2025)

Figure 35. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Application in 2025

Figure 36. Plasma p-Tau217 Assays for Alzheimer's Disease Sales by Company in 2025 (Units)

Figure 37. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Company in 2025

Figure 38. Plasma p-Tau217 Assays for Alzheimer's Disease Revenue by Company in 2025 (\$ millions)

Figure 39. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Company in 2025

Figure 40. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Geographic Region in 2025

Figure 42. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales 2021-2026 (Units)

Figure 43. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Revenue 2021-2026 (\$ millions)

Figure 44. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales 2021-2026 (Units)

Figure 45. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Revenue

2021-2026 (\$ millions)

Figure 46. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales 2021-2026 (Units)

Figure 47. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Revenue 2021-2026 (\$ millions)

Figure 48. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales 2021-2026 (Units)

Figure 49. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Revenue 2021-2026 (\$ millions)

Figure 50. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country in 2025

Figure 51. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Country (2021-2026)

Figure 52. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type (2021-2026)

Figure 53. Americas Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Application (2021-2026)

Figure 54. United States Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 55. Canada Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 56. Mexico Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 57. Brazil Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 58. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Region in 2025

Figure 59. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Region (2021-2026)

Figure 60. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type (2021-2026)

Figure 61. APAC Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Application (2021-2026)

Figure 62. China Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 63. Japan Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 64. South Korea Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 65. Southeast Asia Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 66. India Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 67. Australia Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 68. China Taiwan Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 69. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country in 2025

Figure 70. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share by Country (2021-2026)

Figure 71. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type (2021-2026)

Figure 72. Europe Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Application (2021-2026)

Figure 73. Germany Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 74. France Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 75. UK Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 76. Italy Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 77. Russia Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 78. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Country (2021-2026)

Figure 79. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Type (2021-2026)

Figure 80. Middle East & Africa Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share by Application (2021-2026)

Figure 81. Egypt Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 82. South Africa Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 83. Israel Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 84. Turkey Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth

2021-2026 (\$ millions)

Figure 85. GCC Countries Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Growth 2021-2026 (\$ millions)

Figure 86. Manufacturing Cost Structure Analysis of Plasma p-Tau217 Assays for Alzheimer's Disease in 2026

Figure 87. Manufacturing Process Analysis of Plasma p-Tau217 Assays for Alzheimer's Disease

Figure 88. Industry Chain Structure of Plasma p-Tau217 Assays for Alzheimer's Disease

Figure 89. Channels of Distribution

Figure 90. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Forecast by Region (2027-2032)

Figure 91. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share Forecast by Region (2027-2032)

Figure 92. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share Forecast by Type (2027-2032)

Figure 93. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share Forecast by Type (2027-2032)

Figure 94. Global Plasma p-Tau217 Assays for Alzheimer's Disease Sales Market Share Forecast by Application (2027-2032)

Figure 95. Global Plasma p-Tau217 Assays for Alzheimer's Disease Revenue Market Share Forecast by Application (2027-2032)

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