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Immunoassay Market [Technology (Enzyme, Fluorescent, Chemiluminescence, Radioimmunoassay), Analyzers & Reagents, Applications (Infectious Diseases, Cancer, Endocrinology, Cardiology), End Users (Hospitals, Laboratory, Academics)] – Global Forecast to 2018

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Abstracts

Immunoassay have evolved as an integral part of the modern medical care practice owing to the continuous technological advancements in this field, the increase in healthcare awareness among people, and the increasing use of immunoassay tests in diagnosis and monitoring.

This research report categorizes the global on the basis of technology, application, product (analyzers and reagents), and end user. On the basis of technology, the enzyme immunoassay segment accounted for the largest share of the global market in 2012. Long-term presence in the market, high sensitivity for infectious/viral disease testing, and the huge demand from developing countries due to the lower costs of enzyme immunoassay in comparison to chemiluminescence immunoassay (CLIA) are all factors that are responsible for its growing share in the market. On the basis of product, the reagents market accounted for the largest share of this market in 2012. The accessibility of a wide range of reagents and the need for reliable, specific, and faster detection of chronic diseases at early stages are factors that are expected to drive the immunoassay reagents market.

The infectious diseases segment in the market is a high-volume, high-growth rate market. Major players such as Roche Diagnostics, Ortho Clinical Diagnostics (J&J), and bioMerieux are continuously launching new product models in order to gain a

competitive edge in the infectious diseases segment, primarily because of the high immunoassay penetration rate in this segment.

Geographically, the Americas commanded the largest market share of the global market, followed by Europe. The factors driving the growth of the market in these geographies are the well-established diagnostic infrastructure, aging population, and rising acceptance of personalized medicine. However, on the other hand, the economic downturn and cuts in healthcare budgets are hampering the growth of the market. Countries like China, India, Australia, and Brazil will be major contributors of the growth of the market in the future. This market in China is poised to grow at a CAGR of 15.6% from 2013 to 2018. Increasing investments by leading companies in these immature markets, rising public awareness about personal health, and improving healthcare infrastructure in these regions are driving the growth of the market.

The deviations and the overlap of revenues between the various segments, especially in applications quoted in a number of sources was the major challenge faced while estimating the market size. This challenge was overcome by validating the data through a large number of industry experts and key opinion leaders.

From an insight perspective, this research report focuses on the qualitative data, market size, share, and growth of various segments and sub-segments, competitive landscape, and company profiles. The qualitative data covers various levels of industry analysis, such as market dynamics (drivers, restraints, opportunities, and threats), value chain, PESTEL analysis, porters five forces analysis, regulations, and reimbursement challenges. The report also offers market shares, sizes, and related growth of various segments of the industry. It also focuses on the emerging and high-growth segments of immunoassay (enzyme and chemiluminescence immunoassay), emerging technologies, high-growth regions, countries, and the initiatives of their respective governments.

The competitive landscape covers the growth strategies adapted by the industry players in the last three years. The company profiles comprise of the basic views on the key players in the market and the product portfolios, developments, and strategies adopted to maintain and grow their market shares in the near future. The above mentioned market research data, current market size, and forecast of future trends will help the key players and new entrants to make the necessary decisions regarding product offerings, geographic focus, change in strategic approach, R&D investments for innovation in the products and technologies, and levels of output in order to remain successful.

Scope of the report

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This research report categorizes the global market on the basis of technology, application, product (analyzers and reagents), and end user. These markets are broken down into segments and sub-segments, providing exhaustive value analysis for 2011, 2012, and 2013 as well as forecasts up to 2018. Each segment of the market is comprehensively analyzed at a granular level, by geography (Americas, Europe, APAC, and the Rest of the World), to provide in-depth information on the global scenario.

The global immunoassay market is segmented as follows:

By Technology:

- Enzyme Immunoassay (EIA)
- Fluorescent Immunoassay
- Chemiluminescence Immunoassay (CLIA)
- Radioimmunoassays (RIA)
- Others (Nephelometric Immunoassay, Turbidimetric Immunoassay, and Counting Immunoassay (CIA))

By Application:

- Oncology
- Infectious Diseases
- Cardiology
- Bone and Mineral
- Endocrinology
- Autoimmunity
- Toxicology

- Hematology (Anemia)
- Neonatal Screening
- Others

By Product:

- Analyzers
  - High-throughput
  - Medium-throughput
  - Low-throughput
- Reagents

By End User:

- Hospitals (Private and Public)
- Laboratories (Private and Public)
- Academics
- Pharmaceutical Industry, CROs, and Biotechs
- Others

By Geography:

- Americas
  - U.S.
  - Canada
  - Brazil

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- Mexico
- RoA (Rest of Americas)

Europe

- Germany
- France
- U.K.
- Spain
- Italy
- RoE (Rest of Europe)

Asia-Pacific

- Japan
- China
- India
- South Korea
- RoAP (Rest of Asia-Pacific)

RoW (Rest of World) (Middle East and Africa)

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About

The major factors influencing the immunoassays market are increasing chronic diseases, increasing geriatric population, advancements in technology, the rise in the demand of portable point-of-care testing devices, and increasing healthcare spending from emerging countries.

The enzyme immunoassays segment accounted for the largest share of the global immunoassays market in 2012. This segment is expected to reach $XX million by 2018, at a CAGR of XX% from 2013 to 2018. This large share of enzyme immunoassays is attributed to their long-term market presence, high sensitivity in infectious/viral disease testing, and due to the huge demand from developing countries as they are manually operated and hence are available at lower costs than chemiluminescence immunoassays. However, the chemiluminescence immunoassays market will see the highest growth (CAGR of XX%) in the next five years as this market comprises of automated systems that offer the highest sensitivity.

The reagents segment accounted for the largest share of XX% of the immunoassays market in 2012. The accessibility of a wide range of reagents and the need for reliable, specific, and faster detection of chronic diseases at early stages are factors that are expected to drive the immunoassay reagents market.

Due to the economic slowdown and the Eurozone crisis, the economic situation worldwide is grim. Hence, it is predicted that analyzers and equipment buying will be delayed, at least for two years. However, automation and advancements in analyzers with high-throughput capacities are the major factors responsible for the growth of this market.

The key factors driving the growth of this segment include the rise in the development of drug dependent diagnostics and treatments, increasing need for drug content screening, and the large number of illicit drug users across the world. According to the National Survey on Drug Use and Health report, in 2011, XX million Americans aged 12 or above were illicit drug users. This represents XX% of the total population aged 12 or above.

The toxicology segment is expected to grow at a CAGR of XX% from 2013 to 2018 to reach $XX million by 2018. Roche Diagnostics Limited (Switzerland), Siemens Healthcare (Germany), Danaher Corporation (U.S.), Alere, Inc. (U.S.), and Ortho

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Clinical Diagnostics, Inc. (U.S.) are the key players involved in the manufacturing and marketing of drug testing devices, consumables, assays, and reagents.

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