

# World Nucleic Acid Testing Market 2014: Innovative Technologies and Emerging Business Opportunities

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# Abstracts

This unique seven-country report, 1,050-page report is designed to help current suppliers and potential market entrants identify and evaluate major business opportunities emerging in the NAT market during this decade.

# Highlights

Business and technological trends in seven major markets

Five- and ten-year test volume and sales forecasts

Market shares of leading competitors

Feature comparison of major analyzers

Profiles of market players and start-up firms developing innovative technologies and products

Specific product and business opportunities for instrument and consumable suppliers.

# Rationale

The NAT market is unquestionably the most rapidly growing segment of the in vitro diagnostics industry. The next ten years will witness significant developments in reagent systems and automation, as well as introduction of a wide range of new products that



will require innovative marketing approaches. The rate of market penetration into routine clinical laboratories, however, will depend on the introduction of costeffective and automated systems with amplification methods.

In order to successfully capitalize on the opportunities presented by the NAT market, many companies are already exploiting new molecular technologies as corporate strategic assets, managed in support of business and marketing strategies. Integrating new technology planning with business and corporate strategies will be one of the most challenging tasks for diagnostic companies during the next five years.

#### **Geographic Coverage**

France Germany Italy Japan Spain UK USA

#### Worldwide Market Overview

Laboratories performing DNA sequencing and NAT by country and market segment.

Ten-year test volume and sales projections by country.

#### Market Segmentation Analysis

Sales and market shares of major suppliers of NAT reagent kits and components.



# Five-year test volume and sales forecasts for major applications, including: Infectious Diseases

**Forensic Testing** 

Cancer

Paternity Testing/HLA Typing

Genetic Diseases

Others

Ten-year test volume and sales projections for over 30 NAT assays.

A comprehensive analysis of the sequencing market, by country and laboratory segment, including:

Industrial

Academic

Government

Commercial

Detailed market segmentation analysis, including review of the market dynamics, trends, structure, size, growth and major suppliers, by country.

# Product/Technology Review

Comparison of leading NAT analyzers from Abbott, Beckman Coulter, BD, Bio-Rad, Gen-Probe, Roche, Tecan and other suppliers.

Extensive review of NAT technologies, test formats, detection methodologies, trends in testing automation and over 30 target/signal amplification methods,



includir	ng: PCR
	bDNA
	SDA
	NASBA
	ТМА
	SSSR, and others
	LCR

Worldwide listings of companies, universities and research centers developing new NAT technologies and products.

# **Competitive Assessments**

Extensive strategic assessments of major suppliers and emerging market entrants, including their sales, product portfolios, marketing tactics, collaborative arrangements and new technologies/products in R&D.

Comprehensive listings of companies developing and marketing NAT products, by test and application.

#### **Opportunities and Strategic Recommendations**

Specific new product development opportunities with potentially significant market appeal during the next ten years.

Design criteria for new products.

Alternative market penetration strategies.



Potential market entry barriers and risks.

Business planning issues and concerns.

#### Methodology

This report is based on a combination of primary and secondary information sources, including interviews with laboratory directors and executives of leading diagnostic companies and start-up firms developing innovative technologies and products in the U.S., five major European countries and Japan.

In addition to primary sources of information, a comprehensive review of the most recent technical and business publications, manufacturer product and financial literature, as well as Venture Planning Group's proprietary data base was conducted.

Contains 1050 pages and 96 tables



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**DAP-PCR** Strand Displacement Activation TMA Ligase Chain Reaction **Branched DNA** Hybridization Protection Assay Nucleic-Acid Sequence-Based Amplification Self-Sustained Sequence Replicase Others Ampliprobe CAR CAS CPT Dendritic Polymer Technology ISO-CR LAT **Probe Networks** RAMP **Repair Chain Reaction Rolling Circles** Sequence Independent Gene Amplification Sequence Initiation Reaction SISPA Solid Phase Amplification C. Detection Technologies 1. Radioactive Methods a. Overview b. Major Isotopes P-32 S-35 H-3 I-125 2. Non-Isotopic Methods a. Enzymatic Labels b. Chemical Labeling Indirect Chemical Labeling **Direct Chemical Labeling** 

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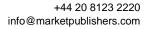


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Abbott Affymetrix Agilent Applied Gene Technologies Arca Beckman Coulter/Danaher



**Becton Dickinson Biokit BioMerieux Bio-Rad Biotest** Caliper Cepheid Decode Diadexus Eiken Enzo **Exact Sciences** Fujirebio Gen-Probe Hologic Illumina Innogenetics/Solvay **Kreatech** Li-Cor Biosciences Life Technologies **Monogram Biosciences** Myriad Genetics Nanogen/Elitech Novartis **Orchid CellMark Ortho-Clinical Diagnostics Proteome Sciences** Qiagen Roche Scienion Sequenom Shimadzu Siemens Sierra Molecular Takara Bio **Tecan Group** 

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U.S.A., NAT Market by Major Supplier

U.S.A., HIV/Hepatitis C NAT Market Reagent Sales By Major Supplier

U.S.A., West Nile Virus NAT Market Reagent Sales By Major Supplier



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