

# **Future Horizons and Growth Strategies in the German Clinical Chemistry and Immunodiagnosics Market 2015: Supplier Shares and Country Forecasts**

<https://marketpublishers.com/r/22EC5F388C8EN.html>

Date: June 2015

Pages: 578

Price: US\$ 4,880.00 (Single User License)

ID: 22EC5F388C8EN

## **Abstracts**

Complete report \$6,100. DataPack (test volumes, sales forecasts, supplier shares) \$3,950.

'Future Horizons and Growth Strategies in the German Clinical Chemistry and Immunodiagnosics Market 2015' is a new strategic analysis of major business opportunities emerging in the German clinical chemistry and immunodiagnostic markets during the next five years. The report explores future trends in the German market; provides estimates of the specimen, test and sales volumes, as well as major suppliers' sales and market shares; compares features of leading analyzers; profiles key competitors; and identifies specific product and marketing opportunities emerging during the next five years.

The report provides five-year volume and sales forecasts for over 100 clinical chemistry, TDM, endocrine, cancer, immunoprotein and abused drug assays performed in hospitals, commercial laboratories, physician offices, and ambulatory care centers, including controls, calibrators and consumables.

## **RATIONALE**

The clinical chemistry and immunodiagnostic markets are undergoing significant transformation, caused by convergence of new and more stringent regulations; advances in diagnostic technologies, system engineering, automation, and IT; and intensifying competition. Some segments, like routine chemistry, are already resembling commodity markets, where product positioning and cost per test are more critical than underlying technology. This evolving marketplace creates exciting opportunities for a

variety of new instruments, reagent systems, and auxiliary products, such as specimen preparation devices, controls, and calibrators.

## **STRATEGIC RECOMMENDATIONS**

New product development opportunities with significant market appeal.

Alternative market penetration strategies.

Potential market entry barriers and risks.

## **COMPETITIVE ASSESSMENTS**

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

The companies analyzed in the report include

Abbott, AdnaGen, Agilent, Bayer, Beckman Coulter/Danaher, Biomedical Diagnostics, bioMerieux, Bio-Rad, DiaSorin, Eiken, Fujirebio, Grifols IL, Kyowa Medex, Matritech/Alere Ortho-Clinical Diagnostics, Quest Diagnostics, Roche, Siemens, Sysmex, Thermo Fisher, Tosoh, Wako, Wallac/PE.

Tests Analyzed in the Report:

### **Routine Clinical Chemistry**

Albumin, Alkaline Phosphatase, ALT/SGPT, Ammonia, Amylase, AST/SGOT, Bilirubin, Total, BUN (Blood Urea Nitrogen), Calcium, Cardio CRP, Carbon Dioxide/Bicarbonate, Chloride, Cholesterol, Creatine Kinase (CK), CK-MB, Creatinine, CRP, Ferritin, GGT, Glucose, HDL Cholesterol, Homocysteine, Iron, LDH, LDL Cholesterol, Magnesium, Phosphorus, Potassium, Protein, Total, Sodium, Triglycerides, Troponin, Uric Acid.

### **Therapeutic Drug Monitoring (TDM)**

Amikacin, Carbamazepine, Cyclosporin, Digoxin, Everolimus, Gentamicin, Levetiracetam, Lithium, Methotrexate, NAPA/Procainamide, Phenobarbital, Phenytoin,

Quinidine, Sirolimus, Tacrolimus, Theophylline, Tobramycin, Topiramate, Valproic Acid, Vancomycin.

#### Endocrine Function

Cortisol, Estradiol, FSH, HCG, Gastrin, LH, Progesterone, PTH/IO PTH, Prolactin, T3, T3 Uptake, Free T3, T4, Free T4, TBG, Testosterone, Thyroglobulin Ab, TPO Ab, TSH.

#### Tumor Markers and Special Chemistry

AFP, CA 15-3/27-29, CA 19-9, CEA, Ferritin, Folate (Folic Acid), Glycosylated Hemoglobin, HCG, 25-Hydroxy Vitamin D2 and D3, Occult Blood, PAP, PSA, Thyroglobulin, Vitamin B-12.

#### Immunoproteins

C3, C4, Free Light Chains, Haptoglobin, IgA, IgE Specific, IgE Total, IgG, IgM, Immunofixation, Prealbumin, Protein Electrophoresis.

#### Drugs of Abuse

Amphetamines, Barbiturates, Benzodiazepines, Cannabinoids/Marijuana, Cocaine, LSD, Methadone, Methaqualone, Opiates, Phencyclidine (PCP), Propoxyphene, Tricyclic Antidepressants.

### **MARKET SEGMENTATION ANALYSIS**

Comprehensive review of the market dynamics, trends, structure, size, growth, and key suppliers.

Test volume and sales forecasts for over 100 clinical chemistry, TDM, endocrine, cancer, immunoprotein and abused drug assays, by market segment:

Hospitals

Commercial/Private Laboratories

Physician Offices/Group Practices

## **CURRENT AND EMERGING PRODUCTS**

Analysis of current and emerging clinical chemistry and immunodiagnostic tests.

Review of current instrumentation technologies, and feature comparison of high-, medium-, and low-volume/POC analyzers.

## **TECHNOLOGY REVIEW**

Assessment of current and emerging technologies, and their potential market applications.

Comprehensive lists of companies developing or marketing new technologies and products by test.

Contains 578 pages and 119 tables

## Contents

### **I. INTRODUCTION**

### **II. WORLDWIDE MARKET OVERVIEW**

1. Business Environment
2. Market Structure
3. Market Size and Growth

### **III. MAJOR PRODUCT DEVELOPMENT OPPORTUNITIES**

### **IV. DESIGN CRITERIA FOR DECENTRALIZED TESTING PRODUCTS**

### **V. ALTERNATIVE MARKET PENETRATION STRATEGIES**

- A. Internal Development
- B. Collaborative Arrangements
- C. University Contracts
- D. Distribution Strategies for Decentralized Testing Markets

### **VI. POTENTIAL MARKET ENTRY BARRIERS AND RISKS**

- A. Market Maturity
- B. Cost Containment
- C. Competition
- D. Technological Edge and Limitations
- E. Patent Protection
- F. Regulatory Constraints
- G. Decentralized Testing Market Challenges

### **VII. WORLDWIDE MARKET AND TECHNOLOGY OVERVIEW**

- A. Major Routine Chemistry Tests
  1. Albumin
  2. Alkaline Phosphatase
  3. ALT/SGPT
  4. Ammonia
  5. Amylase

6. AST/SGOT
  7. Bilirubin, Total
  8. Blood Gases
  9. Blood Urea Nitrogen (BUN)
  10. Calcium
  11. Cardio CRP
  12. Cholesterol
  13. Cholinesterase
  14. CRP
  15. Creatinine
  16. Electrolytes
    - a. Carbon Dioxide/Bicarbonate
    - b. Chloride
    - c. Potassium
    - d. Sodium
  17. Ferritin
  18. Fructosamine
  19. Gamma-Glutamyl Transpeptidase (GGT)
  20. Glucose
  21. High Density Lipoprotein (HDL)
  22. Homocysteine
  23. Iron
  24. Lactate Dehydrogenase (LDH)
  25. Magnesium
  26. Phosphorus
  27. Protein
  28. Triglycerides
  29. Uric Acid
  30. Troponin
- B. Therapeutic Drug Monitoring (TDM)**
1. Overview
  2. Carbamazepine
  3. Cyclosporin
  4. Digoxin
  5. Everolimus
  6. Gentamicin
  7. Lamotrigine/Lamictal
  8. Levetiracetam
  9. Lidocaine

10. Lithium
11. NAPA/Procainamide
12. Phenytoin
13. idine
14. Sirolimus
15. Tacrolimus
16. Theophylline
17. Topirimate
18. Valproic Acid

#### C. Endocrine Function Tests

1. Cortisol
2. Estradiol
3. Follicle-Stimulating Hormone (FSH)
4. Gastrin
5. Growth Hormone/IGF-1
6. Human Chorionic Gonadotropin (HCG)
7. LH
8. Progesterone
9. PTH/IO PTH
10. Prolactin
11. T3
12. T3 Free
13. T3 Uptake
14. T4 (Thyroxine)
15. T4 Free
16. TBG
17. Testosterone
18. Thyroglobulin Ab
19. TPO Ab
20. TSH

#### D. Tumor Markers and Special Chemistry Tests

1. AFP
2. CA 15-3
3. CA 19-9
4. CA 27-29
5. Carcinoembryonic Antigen (CEA)
6. Folate/Folic Acid
7. HCG
8. 25-Hydroxy Vitamin D2 and D3

9. Occult Blood
  10. Prostate-Specific Antigen (PSA)
  11. Thyroglobulin
  12. Vitamin B-12
- E. Immunoprotein Tests
1. Complement
    - a. C3
    - b. C4
  2. Free Light Chains
  3. Immunofixation
  4. Immunoglobulins (IgA, IgE, IgG, IgM)
  5. Haptoglobin
  6. Prealbumin
  7. Protein Electrophoresis
- F. Drugs of Abuse
1. Overview
  2. Test Methodologies
  3. Amphetamines
  4. Barbiturates
  5. Benzodiazepines
  6. Cannabinoids/Marijuana
  7. Cocaine
  8. Lysergic Acid Diethylamide (LSD)
  9. Methadone
  10. Methaqualone
  11. Opiates
  12. Phencyclidine
  13. Tricyclic Antidepressants
- G. Clinical Chemistry and Immunodiagnostic Instrumentation Review: operating characteristics and features of high-, medium-, and low-volume/POC analyzers
- H. Major Clinical Chemistry and Immunodiagnostic Technologies and Their Potential Applications
1. Monoclonal and Polyclonal Antibodies
  2. Immunoassays
  3. Tandem Mass Spec
  4. IT and Automation
  5. Dry Chemistry
  6. Biosensors



## **VIII. GERMANY CLINICAL CHEMISTRY AND IMMUNODIAGNOSTICS MARKET**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Test Volume and Sales Forecasts by Market Segment, Major Supplier Instrument, Reagent Sales and Market Shares

## **IX. COMPETITIVE ASSESSMENTS**

Abbott Laboratories  
AdnaGen  
Agilent Technologies  
Bayer Healthcare  
Beckman Coulter/Danaher  
Biomedical Diagnostics  
BioMerieux  
Bio-Rad  
DiaSorin  
Eiken  
Fujirebio/Innogenetics  
Grifols  
Instrumentation Laboratory  
Kyowa Medex  
Matriech/Alere  
Ortho-Clinical Diagnostics  
Quest Diagnostics  
Roche  
Siemens  
Sysmex  
Thermo Fisher  
Tosoh  
Wako  
Wallac/PE

## List Of Tables

### LIST OF TABLES

Major Companies Developing or Marketing Albumin Tests  
Major Companies Developing or Marketing Alkaline Phosphatase Tests  
Major Companies Developing or Marketing ALT/SGPT Tests  
Major Companies Developing or Marketing Amylase Tests  
Major Companies Developing or Marketing AST/SGOT Tests  
Major Companies Developing or Marketing Bilirubin Tests  
Major Companies Developing or Marketing Blood Gas Analyzers  
Major Companies Developing or Marketing BUN Tests  
Major Companies Developing or Marketing Calcium Tests  
Major Companies Developing or Marketing Cholesterol Tests  
Major Companies Developing or Marketing Creatinine Tests  
Major Companies Developing or Marketing Electrolyte Tests  
Major Companies Developing or Marketing GGT Tests  
Major Companies Developing or Marketing Glucose Tests  
Major Companies Developing or Marketing HDL Tests  
Major Companies Developing or Marketing Iron Tests  
Major Companies Developing or Marketing LDH Tests  
Major Companies Developing or Marketing Magnesium Tests  
Major Companies Developing or Marketing Phosphorus Tests  
Major Companies Developing or Marketing Protein Tests  
Major Companies Developing or Marketing Triglycerides Tests  
Major Companies Developing or Marketing Uric Acid Tests  
Major Companies Developing or Marketing TDM Tests  
Major Companies Developing or Marketing Digoxin Tests  
Major Companies Developing or Marketing Lithium Tests  
Major Companies Developing or Marketing Phenytoin/Dilantin Tests  
Major Companies Developing or Marketing Theophylline Tests  
Major Companies Developing or Marketing Valproic Acid Tests  
Major Companies Developing or Marketing FSH Tests  
Major Companies Developing or Marketing HCG Tests  
Major Companies Developing or Marketing LH Tests  
Major Companies Developing or Marketing Prolactin Tests  
Major Companies Developing or Marketing T3 Tests  
Major Companies Developing or Marketing T4 Tests  
Major Companies Developing or Marketing TSH Tests

Major Companies Developing or Marketing AFP Tests  
Major Companies Developing or Marketing CEA Tests  
Major Companies Developing or Marketing Ferritin Tests  
Major Companies Developing or Marketing Occult Blood Tests  
Major Companies Developing or Marketing Prostatic Acid Phosphatase Tests  
Major Companies Developing or Marketing PSA Tests  
Major Companies Developing or Marketing Vitamin B-12/Folate Tests  
Major Companies Developing or Marketing CRP Tests  
Major Companies Developing or Marketing Drugs of Abuse Tests  
Major Companies Developing or Marketing Biosensors for Immunological Testing  
Executive Summary Table: Germany, Clinical Chemistry and Immunoassay Test  
Volume and Diagnostics Sales Forecast By Test Category  
Germany, Laboratories Performing Chemistry and Immunoassay Tests By Market  
Segment  
Germany, Hospital Laboratories Performing Chemistry and Immunoassay Tests By Bed  
Size  
Germany, Commercial/Private Laboratories Performing Chemistry and Immunoassay  
Tests By Annual Test Volume  
Germany, Total Chemistry and Immunoassay Specimen Volume Forecast  
Germany, All Market Segments, Specimen Volume Forecast By Test Category  
Germany, Total Clinical Chemistry and Immunoassay Test Volume Forecast By Test  
Category  
Germany, Routine Chemistry Test Volume Forecast By Market Segment  
Germany, Endocrine Function Test Volume Forecast By Market Segment  
Germany, Tumor Markers and Special Chemistry Test Volume Forecast By Market  
Segment  
Germany, Immunoprotein Test Volume Forecast By Market Segment  
Germany, TDM Test Volume Forecast By Market Segment  
Germany, Drugs of Abuse Test Volume Forecast By Market Segment  
Germany, All Market Segments, Profiles, Panels and Individual Tests Forecast  
Germany, Hospital Laboratories, Profiles, Panels and Individual Tests Forecast  
Germany, Commercial/Private Laboratories, Profiles, Panels and Individual Tests  
Forecast  
Germany, Physician Offices/Group Practices, Profiles, Panels and Individual Tests  
Forecast  
Germany, All Market Segments, Routine Chemistry Test Volume Forecast by Assay  
Germany, Hospital Laboratories, Routine Chemistry Test Volume Forecast by Assay  
Germany, Commercial/Private Laboratories, Routine Chemistry Test Volume Forecast  
by Assay

Germany, Physician Offices/Group Practices, Routine Chemistry Test Volume Forecast by Assay

Germany, All Market Segments, Endocrine Function Test Volume Forecast by Assay

Germany, Hospital Laboratories, Endocrine Function Test Volume Forecast by Assay

Germany, Commercial/Private Laboratories, Endocrine Function Test Volume Forecast by Assay

Germany, Physician Offices/Group Practices, Endocrine Function Test Volume Forecast by Assay

Germany, All Market Segments, Tumor Markers and Special Chemistry Test Volume Forecast by Assay

Germany, Hospital Laboratories, Tumor Markers and Special Chemistry Test Volume Forecast by Assay

Germany, Commercial/Private Laboratories, Tumor Markers and Special Chemistry Test Volume Forecast by Assay

Germany, Physician Offices/Group Practices, Tumor Markers and Special Chemistry Test Volume Forecast by Assay

Germany, All Market Segments, Immunoprotein Test Volume Forecast by Assay

Germany, Hospital Laboratories, Immunoprotein Test Volume Forecast by Assay

Germany, Commercial/Private Laboratories, Immunoprotein Test Volume Forecast by Assay

Germany, Physician Offices/Group Practices, Immunoprotein Test Volume Forecast by Assay

Germany, All Market Segments, TDM Test Volume Forecast by Assay

Germany, Hospital Laboratories, TDM Test Volume Forecast

Germany, Commercial/Private Laboratories, TDM Test Volume Forecast by Assay

Germany, Physician Offices/Group Practices, TDM Test Volume Forecast by Assay

Germany, All Market Segments, Drugs of Abuse Test Volume Forecast by Assay

Germany, Hospital Laboratories, Drugs of Abuse Test Volume Forecast by Assay

Germany, Commercial/Private Laboratories, Drugs of Abuse Test Volume Forecast by Assay

Germany, Physician Offices/Group Practices, Drugs of Abuse Test Volume Forecast by Assay

Germany, Total Clinical Chemistry and Immunoassay Reagent Market Forecast By Test Category

Germany, Clinical Chemistry and Immunoassay Calibrator and Control Market Forecast By Test Category

Germany, Routine Chemistry Reagent Market Forecast By Market Segment

Germany, Endocrine Function Reagent Market Forecast By Market Segment

Germany, Tumor Markers and Special Chemistry Reagent Market Forecast By Market

## Segment

Germany, TDM Reagent Market Forecast By Market Segment

Germany, Immunoprotein Reagent Market Forecast By Market Segment

Germany, Drugs of Abuse Reagent Market Forecast By Market Segment

Germany, All Market Segments, Routine Chemistry Reagent Market Forecast by Assay

Germany, Hospital Laboratories, Routine Chemistry Reagent Market Forecast by Assay

Germany, Commercial/Private Laboratories, Routine Chemistry Reagent Market Forecast by Assay

Germany, Physician Offices/Group Practices, Routine Chemistry Reagent Market Forecast by Assay

Germany, All Market Segments, Endocrine Function Reagent Market Forecast by Assay

Germany, Hospital Laboratories, Endocrine Function Reagent Market Forecast by Assay

Germany, Commercial/Private Laboratories, Endocrine Function Reagent Market Forecast by Assay

Germany, Physician Offices/Group Practices, Endocrine Function Reagent Market Forecast by Assay

Germany, All Market Segments, Tumor Markers and Special Chemistry Reagent Market Forecast by Assay

Germany, Hospital Laboratories, Tumor Markers and Special Chemistry Reagent Market Forecast by Assay

Germany, Commercial/Private Laboratories, Tumor Markers and Special Chemistry Reagent Market Forecast by Assay

Germany, Physician Offices/Group Practices, Tumor Markers and Special Chemistry Reagent Market Forecast by Assay

Germany, All Market Segments, TDM Reagent Market Forecast by Assay

Germany, Hospital Laboratories, TDM Reagent Market Forecast by Assay

Germany, Commercial/Private Laboratories, TDM Reagent Market Forecast by Assay

Germany, Physician Offices/Group Practices, TDM Reagent Market Forecast by Assay

Germany, All Market Segments, Immunoprotein Reagent Market Forecast by Assay

Germany, Hospital Laboratories, Immunoprotein Reagent Market Forecast

Germany, Commercial/Private Laboratories, Immunoprotein Reagent Market Forecast by Assay

Germany, Physician Offices/Group Practices, Immunoprotein Reagent Market Forecast by Assay

Germany, All Market Segments, Drugs of Abuse Reagent Market Forecast by Assay

Germany, Hospital Laboratories, Drugs of Abuse Reagent Market Forecast by Assay

Germany, Commercial/Private Laboratories, Drugs of Abuse Reagent Market Forecast by Assay

Germany, Physician Offices/Group Practices, Drugs of Abuse Reagent Market Forecast by Assay

Germany, Major Suppliers of Clinical Chemistry Reagents, Estimated Sales and Market Shares

Germany, Major Suppliers of Clinical Chemistry Analyzers, Estimated Instrument Sales and Market Shares

Germany, Major Suppliers of Clinical Chemistry Diagnostics Products, Estimated Sales and Market Shares

Germany, Major Suppliers of Immunoassay Reagents, Estimated Sales and Market Shares

Germany, Major Suppliers of Immunoassay Analyzers, Estimated Instrument Sales and Market Shares

Germany, Major Suppliers of Immunoassay Diagnostic Products, Estimated Sales and Market Shares

Germany, Clinical Chemistry and Immunoassay Instrument Market Forecast By Analyzer Type

## I would like to order

Product name: Future Horizons and Growth Strategies in the German Clinical Chemistry and Immunodiagnosics Market 2015: Supplier Shares and Country Forecasts

Product link: <https://marketpublishers.com/r/22EC5F388C8EN.html>

Price: US\$ 4,880.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/22EC5F388C8EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970

