

# **2014 World In Vitro Diagnostics Industry: Market Shares and Country Forecasts for 400 Assays, 20 Market Segments and 14 Test Locations--Emerging Opportunities and Business Expansion Strategies for Suppliers**

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## **Abstracts**

To prepare diagnostics industry executives for radically different operating climates and reduce surprises, Venture Planning Group has published a series of 10 global market research surveys, "2014 World In Vitro Diagnostics Industry:Market Shares and Country Forecasts." The series is designed to provide industry decision-makers with strategically significant competitor information, analyses and insight crucial to the development and implementation of effective business, marketing and R&D programs. The report examines future trends in the U.S., Europe and Asia; reviews over 400 current and emerging assays; analyzes potential applications of innovative technologies; provides supplier shares and sales forecasts by assay, method, market segment, and country; profiles leading players and potential market entrants; and suggests alternative market expansion strategies for instrument and reagent suppliers. The series is based on the following studies:

Future Scenarios of the In Vitro Diagnostics Market: Technological Breakthroughs, Economic Austerity, Business-as-Usual

2014 Opportunities in the Global Clinical Chemistry and Immunodiagnostics: Spot Fast-Growing Market Segments Therapeutic Drug Monitoring (TDM), Endocrine Function, Tumor Markers, Special Chemistry, Immunoproteins, Drugs of Abuse

2014 Analysis of the Global Molecular Diagnostics Market Integrating New

Technology Planning with Business and Corporate Strategies- Emerging Tests, Market Forecasts, Competitive Intelligence

2014 Automated Microbiology Market Molecular Diagnostics, Microbial Identification, Antibiotic Susceptibility, Blood Culture, Urine Screening, Immunodiagnosics

Infectious Disease Testing: A Rapidly Growing and Challenging Market Technological Breakthroughs, Emerging Tests, Market Forecasts, Competitive Intelligence

2014 Market Segmentation Analysis of the Global Cancer Diagnostics Industry: Oncogenes, Biochemical Markers, Lymphokines, GFs, CSFs, Hormones, Immunohistochemical Stains--Hospitals, Commercial Labs, POC Locations

2014 Analysis of the Global Hematology and Flow Cytometry Markets: France, Germany, Italy, Japan, Spain, UK, USA Sales Forecasts, Supplier Shares, Competitive Strategies

2014 Molecular Blood Typing, Grouping and Infectious Disease NAT Market: France, Germany, Italy, Japan, Spain, UK, US--Emerging Technologies, Sales Forecasts, Supplier Shares, Competitive Strategies

New Frontiers in Coagulation Testing: Global Challenges, Emerging Technologies, Competitive Landscape

2014 Analysis of the Global Point-of-Care Diagnostic Testing Market Country Segment Forecasts, Market Shares, Emerging Technologies, Competitive Strategies, Growth Opportunities

## **Report Highlights**

### Worldwide Market Overview

Facilities performing diagnostic tests by country.

Test volume and sales projections by country.

## Market Segmentation Analysis

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

Test volume and sales forecasts for over 400 diagnostic procedures.

Market segments analyzed in the report include:

## Clinical Chemistry

### Immunodiagnostics

TDM

Endocrine Function

Special Chemistry

Immunoproteins

Drugs of Abuse

### Molecular Diagnostics

Infectious Diseases

Cancer

Genetic Testing

Forensic Testing

Paternity Testing/HLA Typing

### Microbiology

Microbial Identification

Antibiotic Susceptibility

Urine Screening

Blood Culture

Cancer Diagnostic

Hematology

Flow Cytometry

Blood Typing, Grouping, and Screening

Coagulation Testing

Centralized Testing Locations

Hospitals

Commercial/Private Laboratories

Public Health Laboratories

Blood Banks

POC/Decentralized Testing Locations

Home/Personal Testing

Physician Offices/Group Practices

Emergency Rooms

Operating/Recovery Suites

ICUs/CCUs

Cancer Clinics

Ambulatory Care Centers

Surgery Centers

Nursing Homes

Birth Centers

## Emerging Tests and Instrumentation

Analysis of current and emerging tests.

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

## Technology Review

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

Worldwide listings of companies developing or marketing new technologies and products by test.

## 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 diagnostic product manufactures 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

ADI/America Diagnostica

AdnaGen

Affymetrix

Agilent Technologies

Applied Gene Technologies

Arca/Nuvelo

Axis-Shield

Alere/Biosite/Inverness

Bayer Healthcare

Beckman Coulter/Danaher

Becton Dickinson

Bio/Data

Biokit

Biomedical Diagnostics

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Biotest

Caliper

Cellavision

Cepheid

Chrono-Log

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Lonza

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Matritech/Alere



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SeraCare

Shimadzu

Siemens

Sienco

Sierra Molecular

Sysmex

Takara Bio

Targeted Diagnostics & Therapeutics

Tecan Group

Thermo Fisher/Life Technologies

Tosoh

Trinity Biotech

Veridex

Wako

Wallac/PE

Zycare/Alere

Zyla

## **Methodology**

The report is based on a combination of primary and secondary information sources, including questionnaire responses, as well as interviews with laboratory directors and executives of leading diagnostic companies and start-up firms developing innovative technologies and products in the U.S., Europe and Asia. In addition to primary sources of information, a comprehensive review of Venture Planning Groups proprietary database, and the most recent technical, business, manufacturer, and financial publications was conducted.

Contains approximately 9,700 pages and 3,200 tables

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Matriech/Alere

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Lonza  
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Myriad Genetics  
Nanogen/Elitech  
Novartis Diagnostics/Grifols  
Orchid CellMark  
Ortho-Clinical Diagnostics  
Proteome Sciences  
Qiagen  
Roche  
Scienion  
Sequenom  
SeraCare  
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1. HEMATOLOGY ANALYZERS
2. FLOW CYTOMETERS
3. PLATELET AGGREGOMETERS
4. SEDIMENTATION RATE ANALYZERS

#### D. Current Market Needs and Future Demand For Hematology Analyzers

#### E. Reagents and Controls

#### F. Current and Emerging Technologies

#### G. Worldwide Market Overview

1. BUSINESS ENVIRONMENT
2. MARKET STRUCTURE
3. MARKET SIZE AND GROWTH

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#### A. Executive Summary

#### B. Business Environment

#### C. Market Structure

#### D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base, Sales and Market Shares

### **IV. Germany**

#### A. Executive Summary

#### B. Business Environment

#### C. Market Structure

#### D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base, Sales and Market Shares

## **V. Italy**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base, Sales and Market Shares

## **VI. Japan**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base, Sales and Market Shares

## **VII. Spain**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base, Sales and Market Shares

## **VIII. U.K.**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base, Sales and Market Shares

## **IX. U.S.**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers' Instrument Placements, Installed Base,

Sales and Market Shares

## **X. Major Product Development Opportunities**

## **XI. Design Criteria for Decentralized Testing Products**

## **XII. Alternative Market Penetration Strategies**

## **XIII. Potential Market Entry Barriers and Risks**

## **XIV. COMPETITIVE ASSESSMENTS**

Abbott

Agilent Technologies

Beckman Coulter/Danaher

Becton Dickinson

Bio-Rad

CellaVision

Horiba

Iris

Nihon Kohden

Ortho-Clinical Diagnostics

Roche

Siemens

Sysmex

## **XV. Appendix**

### **2014 Molecular Blood Typing, Grouping and Infectious Disease NAT Market: France, Germany, Italy, Japan, Spain, UK, USA-Emerging Technologies, Sales Forecasts, Supplier Shares, Competitive Strategies**

#### **I. Introduction**

#### **II. Worldwide Technology and Market Overview**

##### **A. Major Blood Typing, Grouping and Infectious Disease Screening Tests**

###### **a. Blood Typing and Grouping Tests**

###### **b. Blood Group Genotyping**

- c. Infectious Disease Screening Tests
- d. Pathogen Reduction
- e. Leukocyte Reduction

B. Instrumentation Review: Operating Characteristics, Features and Selling Prices of Leading Automated And Semiautomated Analyzers

C. Major in Vitro Diagnostic Technologies And Their Potential Applications

D. Worldwide Market Overview

1. BUSINESS ENVIRONMENT
2. MARKET STRUCTURE
3. MARKET SIZE AND GROWTH

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A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping and Infectious Disease Screening Tests

### **IV. Germany**

A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping and Infectious Disease Screening Tests

### **V. Italy**

A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping and Infectious Disease Screening Tests

### **VI. Japan**

A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping and Infectious Disease Screening Tests

## **VII. Spain**

A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping and Infectious Disease Screening Tests

## **VIII. U.K.**

A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping

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B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Supplier Sales and Market Shares for Blood Typing, Grouping And Infectious Disease Screening Tests

## **X. Major Product Development Opportunities**

## **XI. Alternative Market Penetration Strategies**

## **XII. Potential Market Entry Barriers and Risks**

## **XIII. COMPETITIVE ASSESSMENTS**

Abbott

Beckman Coulter/Danaher

Becton Dickinson

Biokit  
BioMerieux  
Bio-Rad  
Diagast  
DiaSorin  
Fujirebio/Innogenetics  
Grifols/Novartis  
Hologic/Gen-Probe  
Immucor  
Orchid CellMark  
Ortho-Clinical Diagnostic  
Proteome Sciences  
Quest  
Quidel  
Roche  
Siemens  
Tecan  
Thermo Fisher/Life Technologies

## **New Frontiers in Coagulation Testing: Global Challenges, Emerging Technologies, Competitive Landscape**

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- A. Major Routine and Special Coagulation Tests
- B. Instrumentation Review
- C. Major in Vitro Diagnostic Technologies and Their Potential Applications
- D. Worldwide Market Overview
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  - 2. MARKET STRUCTURE
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- A. Executive Summary
- B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Instrument And Reagent Suppliers' Sales and Market Shares

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A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Instrument And Reagent Suppliers' Sales and Market Shares

#### **V. Italy**

A. Executive Summary

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D. Market Size, Growth and Major Instrument And Reagent Suppliers' Sales and Market Shares

#### **VI. Japan**

A. Executive Summary

B. Business Environment

C. Market Structure

D. Market Size, Growth and Major Instrument And Reagent Suppliers' Sales and Market Shares

#### **VII. Spain**

A. Executive Summary

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D. Market Size, Growth and Major Instrument And Reagent Suppliers' Sales and Market Shares

#### **VIII. UK**

A. Executive Summary

- B. Business Environment
- C. Market Structure
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## **IX. USA**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth And Major Instrument And Reagent Suppliers' Sales and Market Shares

## **X. Major Product Development Opportunities**

## **XI. Design Criteria For Decentralized Testing Products**

## **XII. Alternative Market Penetration Strategies**

## **XIII. Potential Market Entry Barriers and Risks**

## **XIV. COMPETITIVE ASSESSMENTS**

Abbott  
ADI/American Diagnostic  
Axis-Shield  
Alere/Biosite/Inverness Beckman Coulter/Danaher  
Becton Dickinson  
Bio/Data  
Chrono-Log  
Corgenix Medical  
Diagnostica Stago/Trinity Biotech  
Grifols  
Helena Laboratories  
HYPEN BioMed  
Instrumentation Laboratory  
ITC/Nexus Dx  
Roche  
Siemens



Sienco  
Sysmex  
Thermo Fischer/Life Technologies  
ZyCare/Alere

## **2014 Analysis of the Global Point-of-Care Diagnostic Testing Market: Country Challenges, Emerging Technologies, Competitive Landscape**

### **I. Introduction**

### **II. Executive Summary**

A. Rationale for Testing Decentralization

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- K. Instrumentation
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- L. Current and Emerging Technologies
- M. Worldwide Business Environment

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- Non-Invasive Testing
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- 3. OCCULT BLOOD TESTS
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    - a. Market Summary
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  - 3. TEST VOLUME AND SALES FORECASTS
- F. Ambulatory Care Centers
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  - 3. MARKET STRUCTURE
  - 4. TEST VOLUME AND SALES FORECASTS
- G. Surgery Centers
  - 1. INTRODUCTION
  - 2. MARKET SUMMARY
  - 3. MARKET STRUCTURE
  - 4. TEST VOLUME AND SALES FORECASTS
- H. Nursing Homes
  - 1. INTRODUCTION

- 2. MARKET SUMMARY
- 3. MARKET STRUCTURE
- 4. TEST VOLUME AND SALES FORECASTS
- I. BIRTH CENTERS
  - 1. INTRODUCTION
  - 2. MARKET SUMMARY
  - 3. MARKET STRUCTURE
  - 4. TEST VOLUME AND SALES FORECASTS
- J. Major Supplier Instrument Placements, Installed Base, Consumables Sales and Market Shares

## **V. Germany**

- A. Market Overview
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

## **VI. Spain**

- A. Business Environment
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

## **VII. Major Product Development Opportunities**

## **VIII. Design Criteria for Decentralized Testing Products**

## **IX. Alternative Market Penetration Strategies**

## **X. Potential Market Entry Barriers and Risks**

## **XI. Company Profiles**

Abbott  
ADI/America Diagnostica  
Agilent Technologies  
Axis-Shield  
Beckman Coulter/Danaher  
Becton Dickinson  
Bio/Data  
Biomerieux  
Bio-RadBiosite/Inverness/Alere  
Cepheid  
Chrono-Log  
Corgenix  
Decode  
Diadexus  
Diagnocure  
Diagnostica Stago/Trinity Biotech  
Diamedix  
Diasorin  
Eiken Chemical  
EKF Diagnostics  
Fujirebio/Innogenetics  
Grifols  
Helena Laboratories  
Hologic/Gen-Probe  
Horiba  
Instrumentation Laboratory  
International Technidyne/Nexus DX  
Kreatech  
Kyowa Medex  
Lonza  
Mackay Life Sciences  
Matritech  
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