

# 2012 Germany Cancer Diagnostics Market Outlook: Growth Opportunities and Strategies

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## **Abstracts**

This report presents a comprehensive analysis of the German cancer diagnostics market, including:

Major issues pertaining to the German laboratory practice, as well as key economic, regulatory, demographic, social and technological trends with significant market impact during the next ten years.

Mortality statistics and scientific views on the etiology of major types of cancer, e.g., lung, colorectal, breast, prostatic, pancreatic, leukemia, lymphoma, gastrointestinal, bladder, liver, ovarian, testicular, oral, skin and others.

Ten-year test volume and sales forecasts for 40 cancer diagnostic procedures performed in German hospitals, commercial laboratories and physician offices.

Placements and installed base of automated and semiautomated analyzers used for cancer testing.

Current instrumentation technologies and feature comparison of leading analyzers.

Sales and market shares of leading suppliers.

Emerging diagnostic technologies and their potential market applications.

Product development opportunities.



Profiles of current and emerging suppliers, including their sales, market shares, product portfolios, marketing tactics, technological know-how, new products in R&D, collaborative arrangements and business strategies.

Business opportunities and strategic recommendations for suppliers.

Contains 585 pages and 95 tables.



## **Contents**

#### INTRODUCTION

#### WORLDWIDE MARKET AND TECHNOLOGY OVERVIEW

#### A. CANCER STATISTICS AND ETIOLOGY

- 1. Brest Cancer
- 2. Lung Cancer
- 3. Colon and Rectum Cancer
- 4. Prostate Cancer
- 5. Stomach Cancer
- 6. Leukemia
- 7. Lymphoma
- 8. Oral Cancer
- 9. Skin Cancer
- 10. Uterine Cancer
- 11. Ovarian Cancer
- 12. Bladder Cancer

#### B. MAJOR CURRENT AND EMERGING CANCER DIAGNOSTIC TESTS

- 1. Introduction
- 2. Tumor Marker Classification
- 3. ACTH
- 4. Alpha-Fetoprotein (AFP)
- 5. Beta-2 Microglobulin
- 6. CA 15-3/27.29
- 7. CA 19-9
- 8. CA-125
- 9. Calcitonin
- 10. Carcinoembrionic Antigen (CEA)
- 11. Estrogen and Progesterone Receptors
- 12. Ferritin
- 13. Gastrin
- 14. Human Chorionic Gonadotropin (HCG)
- 15. Insulin
- 16. NSE



- 17. Occult Blood
- 18. PAP Smear/HPV
- 19. Prostatic Acid Phosphatase (PAP)
- 20. Prostate-Specific Antigen (PSA)
- 21. Squamous Cell Carcinoma Antigen (SCC)
- 22. T and B Lymphocytes
- 23. TdT
- 24. Thyroglobulin
- 25. Tissue Polypeptide Antigen (TPA)
- 26. Biochemical Tumor Markers

**ADA** 

**B-Protein** 

**PNP** 

5'-Nucleotidase

27. Oncogenes

Abl/abl-bcr

AIB1

BCL-2

BRCA1

**CD44** 

C-fos

C-myb

C-myc

CYP-17

Erb-B

HPC1

N-myc

P40

P51

P53

PIK3CA

PTI-1

Ras

Reg

Sis

Src

28. Polypeptide Growth Factors

Basic Fibroblast Growth Factor

Beta-TGF



Cachectin (TNT)

Calmodulin

**ECFR** 

Nerve Growth Factor (NGF)

Epidermal Growth Factor (EGF)

Ornithine Decarboxylase

Transferrin

Transforming Growth Factor-Alpha

- 29. Ectopic Hormones
- 30. Colony Stimulating Factors
- 31. Lymphokines

Alpha-Interferon

**B Cell Growth Factors** 

B Cell Growth Factor (BCGF)

Gamma-Interferon

Interleukin-1 (IL-1)

Macrophage Activating Factor

- 32. Immunohistochemical Stains
- 33. Emerging Tumor Markers

N-Acetylglucosamine

Actin

Alpha-Actin

**Antineuronal Antibodies** 

7B2

B72.3

Bax

BCD-F9

BLCA-4

Blood Group Antigens A,B,H

CA 50

CA 72-4/TAG-72

CA 195

CA-242

CA-549

**CAM 26** 

CAR-3

Cathepsin-D

Chromogranin A and B

Cluster 1 Antigen



Cluster-5/5A Antigen

**CTA** 

**CU18** 

**DR-70** 

DU-PAN-2

**Endometrial Bleeding Associated Factor** 

Endostatin

Epithelial Membrane Antigen

Feulgen Hydrolysis

Fibronectin

**FSH** 

(1->3)-L-fucosyltransferase

Gastrin-Releasing Peptide (GRP)

GDCFP-15

Glucagon

Glycoamines

H23

Her-2

Human Carcinoma Antigen

**HPA** 

HSP27

Intermediate Filaments

Cytokeratins/CK18/Cyfra 21-1

Desmin

Gliofibrillary Acid Protein

Neurofilaments

Vimentin

**KA 93** 

Kinases

**KP16D3** 

LAI

Leukocyte Common Antigen

Lewis Antigens

Lysophosphatidic Acid (LPA)

Ma 695/Ma 552

MABDF3

MAG

ME1

Minactivin



MN/CA9

**MSA** 

Mucin Cancer Antigen (MCA)

Multiple Tumor Suppressor 1

Myosin

**NEA-130** 

NMP22

OA-519

**Opiod Peptides** 

P-glycoprotein

Pancreatic Oncofetal Antigen (POA)

Placental Lactogen

PR92

Proliferative Index, Ki-67

Px

RB Inactivation/Deletion

Ret

**SCCL 175** 

Selectin

Sialic Acid

Sialyl SSEA-1/SLX

SN10

Somatostatin

TA-90

**TABA** 

Tachykinin

**TAG 12** 

**TPS** 

**Troponin** 

**Tubulin** 

**VCAM** 

**VEGF** 

Villen

## C. INSTRUMENTATION REVIEW AND MARKET NEEDS

- 1. Abbott AxSYM
- 2. Abbott Architect c4000
- 3. Abbott Architect i2000 Series



- 4. Abbott Architect ci8200 System
- 5. Beckman Coulter UniCel Series
- 6. Beckman Coulter Access
- 7. Binding Site ESP600
- 8. bioMerieux Mini Vidas
- 9. Carolina Chemistries BioLis 24i
- 10. DiaSorin Liaison
- 11. Horiba ABX Pentra 400
- 12. Inverness DS2
- 13. J&J Vitros ECi/ECiQ
- 14. J&J Vitros 3600
- 15. J&J Vitros 5600
- 16. Olympus AU5400
- 17. Olympus AU3000i
- 18. Olympus AU2700
- 19. Roche Modular Analytics
- 20. Roche Cobas Integra 400
- 21. Roche Cobas Integra 400 Plus
- 22. Roche Elecsys
- 23. Roche Cobas c311
- 24. Siemens ADVIA Centaur
- 25. Siemens Dimension
- 26. Siemens Dimension RxL Max
- 27. Siemens Dimension Vista 500
- 28. Siemens Immulite
- 29. Siemens Stratus
- 30. Tosoh AIA-Series
- 31. Vital Diagnostics ATAC 8000
- 32. Vital Diagnostics Envoy 500

## D. CURRENT AND EMERGING TECHNOLOGIES

- Monoclonal and Polyclonal Antibodies
- 2. Immunoassays
  - a. Technological Principle
  - b. Radioimmunoassay (RIA)
  - c. Enzyme Immunoassays (EIA)

Overview

**ELISA** 



#### **Immunofiltration**

Particle-Membrane Capture Immunoassay

**Enzyme Amplification** 

- d. Fluorescent Immunoassays
- e. Luminescence

Chemiluminescence

Bioluminescence

- f. Latex Agglutination
- g. Immunoprecipitation
- h. Affinity Chromatographu
- e. Liposome Flow-Injection Immunoassay
- 3. Molecular Diagnostics
  - a. Technology Overview
  - b. Amplification Methods

**PCR** 

**DAP-PCR** 

Immuno-PCR

QC-PCR

CAR

DNA

**HPA** 

**LCR** 

**NASBA** 

**QBR** 

**SDA** 

- 3 SR, and others
- 4. Chromosome Analysis
  - a. Chronic Myelogenous Leukemia (CML)
  - b. Acute Myeloid Leukemia (AML)
  - c. Acute Lymphoblastic Leukemia (ALL)
  - d. Malignant Lymphomas Lymphoid Malignancies
  - e. Chronic Lymphocytic Leukemia (CLL)
  - f. Solid Cancers
  - g. Chromosomal Translocation and Oncogenes
- 5. Artificial Intelligence
- 6. Flow Cytometry
- 7. Two Dimensional Gel Electrophoresis (2-DGE)
- 8. Biosensors
- 9. Competing/Complementing Technologies



- a. CT
- b. MRI
- c. NMR
- d. PET
- e. Photonics Spectroscopy

#### **E. PERSONAL TESTING**

#### **GERMANY**

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers

#### MAJOR PRODUCT DEVELOPMENT OPPORTUNITIES

- A. Reagent Kits and Test Systems/Panels
- B. Instrumentation
- C. Computers, Software and Automation
- D. Auxiliary Products

#### DESIGN CRITERIA FOR DECENTRALIZED TESTING PRODUCTS

### **ALTERNATIVE MARKET PENETRATION STRATEGIES**

- A. Internal Development
- B. Collaborative Arrangements
- C. University Contracts
- D. Distribution Strategies
  - 1. Marketing Approaches
  - 2. Product Complexity
  - 3. Customer Preference
  - 4. Established Suppliers
  - 5. Emerging Suppliers
  - 6. Major Types of Distributors
  - 7. Market Segmentation Factor

#### 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

## **COMPETITIVE PROFILES**

Abbott

AdnaGen

Applied Gene Technologies

Arca

Beckman Coulter/Danaher

**Becton Dickinson** 

**Biomedical Diagnostics** 

bioMerieux

Bio-Rad

Cepheid

Correlogic Systems

Dako

Decode

Diadexus

Diagnocure

Diasorin

Eiken Chemical

**Enterix** 

Enzo Biochem

**Epigenomics** 

**Exact Sciences** 

Fujirebio

Gen-Probe

**Guided Therapeutics** 

Hologic

Ipsogen

Kreatech

Kyowa Medex



Life Technologies

Mackay Life Sciences

Myriad Genetics

Nanogen Elitech

OncoLab

Otho-Clinical Diagnostics

Panacea Pharmaceuticals

Polartechnics

Polymedco

PreMD

Qiagen

Radient Pharmaceuticals

Roche

Scienion

Sequenom

Siemens Healthcare

Takara Bio

**Targeted Diagnostics & Therapeutics** 

Tosoh

Veridex

Wako Pure Chemicals

Wallac/PE

Zila

#### **APPENDIXES**

Appendix I: Major Universities and Research Centers Developing Cancer Diagnostic

**Technology and Applications** 

Appendix II: Assumed Currency Exchange Rates



## **List Of Tables**

#### LIST OF TABLES

**Tumor Marker Classification** 

Major Companies Developing or Marketing ACTH Tests

Major Companies Developing or Marketing AFP Tests

Major Companies Developing or Marketing Beta-2 Microglobulin Tests

Major Companies Developing or Marketing CA 15-3/27.29 Tests

Major Companies Developing or Marketing CA 19-9 Tests

Major Companies Developing or Marketing CA 125 Tests

Major Companies Developing or Marketing Calcitonin Tests

Major Companies Developing or Marketing CEA Tests

Major Companies Developing or Marketing Estrogen Receptor Tests

Major Companies Developing or Marketing Progesterone Receptor Tests

Major Companies Developing or Marketing Ferritin Tests

Major Companies Developing or Marketing Gastrin Tests

Major Companies Developing or Marketing HCG Tests

Major Companies Developing or Marketing Insulin Tests

Major Companies Developing or Marketing NSE Tests

Major Companies Developing or Marketing Occult Blood Tests

Major Companies Developing or Marketing PAP Smear/HPV Tests

Major Companies Developing or Marketing PAP Tests

Major Companies Developing or Marketing PSA Tests

Major Companies Developing or Marketing Lymphocyte Subclassification Tests

Biochemical Markers Potential Applications In Cancer Diagnosis

Oncogenes Potential Applications In Cancer Diagnosis

Major Companies Developing or Marketing Oncogene Tests

Growth Factors Potential Applications In Cancer Diagnosis

Colony Stimulating Factors Potential Applications in Cancer Diagnosis

Lymphokines Potential Applications In Cancer Diagnosis

Immunohistochemical Stains Potential Applications in Cancer Diagnosis

Executive Summary Table: Germany, Total Tumor Marker Test Volume and Sales

Forecast By Market Segment

Germany, Estimated Cancer Death Rates Per 100,000 Population

Germany, Laboratories Performing Tumor Marker Tests by Market Segment

Germany, Hospital Laboratories Performing Tumor Marker Tests by Bed Size

Germany, Commercial/Private Laboratories Performing Tumor Markers by Annual Test Volume



Germany, Total Tumor Marker Test Volume Forecast by Market Segment

Germany, All Market Segments, Major Tumor Marker Test Volume Forecast

Germany, Hospital Laboratories, Major Tumor Marker Test Volume Forecast by Test

Germany, Commercial/Private Laboratories Major Tumor Marker Test Volume Forecast

Germany, Physician Offices/Group Practices Major Tumor Marker Test Volume Forecast

Germany, Total Tumor Marker Sales Forecast by Market Segment

Germany, All Market Segments Major Tumor Marker Sales Forecast by Test

Germany, Hospital Laboratories, Major Tumor Marker Sales Forecast by Test

Germany, Commercial/Private Laboratories Major Tumor Marker Sales Forecast by Test

Germany, Physician Offices/Group Practices Major Tumor Marker Sales Forecast by Test

Germany, ACTH Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, AFP Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Beta-2 Microglobulin Test Volume And Diagnostics Sales Forecast by Market Segment

Germany, CA-15-3/27.29 Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, CA-19 Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, CA 125 Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Calcitonin Test Volume And Diagnostic Sales Forecast by Market Segment

Germany, Cathepsin Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, CEA Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Chromogranin Test Volume And Diagnostics Sales Forecast by Market Segment

Germany, Colon-Specific Antigen Test Volume And Diagnostics Sales Forecast by Market Segment

Germany, Cytokeratins Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Estrogen Receptor Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Ferritin Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Gastrin Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, HCG, Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Insulin Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Interferons Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Interleukins Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Lymphocyte Subtyping Test Volume and Diagnostics Sales Forecast by



Market Segment

Germany, NSE Test Volume and Diagnostics Sales Forecast by Market Segment Germany, Occult Blood Test Volume and Diagnostics Sales Forecast by Market

Segment

Germany, Oncogenes Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Pancreatic Oncofetal Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Pap Smear Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Parathyroid Hormone Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Progesterone Receptor Test Volume And Diagnostics Sales Forecast by Market Segment

Germany, PAP Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, PSA Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, S-100 Protein Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Serotonin Test Volume and Diagnostics Sales Forecast by Mar Segment

Germany, Sialic Acid Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Squamous Cell Carcinoma Antigen Test Volume and Diagnostics Sales Forecast By Market Segment

Germany, TDT Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Thymidine Kinase Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Thyroglobulin Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, TPA Test Volume and Diagnostics Sales Forecast by Market Segment

Germany, Total Tumor Marker Sales By Major Supplier

Germany, AFP Testing Market Diagnostics Sales by Major Supplier

Germany CA 15-3/27.29 Testing Market Diagnostics Sales by Major Supplier

Germany CA 19-9 Testing Market Diagnostics Sales by Major Supplier

Germany, CA 125 Testing Market Diagnostics Sales by Major Supplier

Germany, CEA Testing Market Diagnostics Sales by Major Supplier

Germany, PSA Testing Market Diagnostics Sales by Major Supplier



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