

2014 Analysis of the Tumor Markers: US, Europe, Japan - Emerging Opportunities and Business Expansion Strategies for Suppliers

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Abstracts

Complete report \$28,500. DataPack (test volumes, sales forecasts, supplier shares) \$9,800.

Highlights

Identifies and evaluates major business opportunities emerging in the tumor marker market during the next ten years

Examines trends in the U.S., Europe and Japan

Reviews current and emerging tumor markers

Analyzes applications of emerging diagnostic technologies

Forecasts sales of major tumor markers by country and market segment

Profiles leading market players and potential entrants

Suggests alternative business expansion strategies for suppliers.

Rationale

The cancer diagnostics market is on the verge of explosion, as the researchers approach major technological breakthroughs in tumor diagnosis and therapy, discover



new specific antigens, and unlock the mystery of the genetic basis of the disease. During the next ten years, the worldwide cancer diagnostics market is promising to be an exciting, dynamic and rapidly expanding field. Anticipated technological breakthroughs will create numerous opportunities for determining genetic predisposition, detecting specific tumors, and monitoring biological response to cancer therapy. The rise in geriatric population will further compound the growing demand for malignancy assays and the rapid market expansion worldwide.

Geographic Coverage

France
Germany
Italy
Japan
Spain
UK
USA

Market Segmentation Analysis

Sales and market shares of major suppliers, by individual tumor marker and country.

Ten-year test volume and sales forecasts for major tumor markers by country and market segment, including:

Hospitals

Commercial/Private Laboratories

Physician Offices/Group Practices

Cancer Clinics



Ambulatory Care Centers

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

Cancer statistics, etiology and recent developments in the U.S., Japan and five major European countries.

Current and Emerging Products

Review of over 200 current and emerging tumor markers, including: Biochemical Markers

Oncogenes

Growth Factors

Hormones

Colony Stimulating Factors

Lymphokines

Immunohistochemical Stains, and others.

Analysis of major immunoassay analyzers used for tumor marker testing, including their operating characteristics, features and selling prices.

Technology Review

Assessment of monoclonal antibodies, immunoassays, DNA probes, biochips/microarrays, chromosome analysis, IT, artificial intelligence, flow cytometry, biosensors, and their potential applications for tumor marker testing.



Review of competing/complementing technologies, including CT, MRI, NMR, PET and photonics spectroscopy.

Extensive listings of over 500 companies, universities and research centers developing new tumor markers and detection technologies.

Competitive Assessments

Extensive strategic assessments of major suppliers and start-up firms developing innovative technologies and products, including their sales, product portfolios, marketing tactics, collaborative arrangements and new products in R&D.

Worldwide Market Overview

Estimated universe of laboratories performing tumor marker testing by country.

Ten-year test volume and sales projections by country.

Business 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.

Methodology

This report is based on interviews with clinical pathologists, laboratory directors, executives from leading diagnostic companies and start-up firms developing innovative products, university scientists, as well as experts from industry associations, venture capital firms and the investment banking community in the U.S., five major European countries and Japan.



The market projections are also based on questionnaire responses received from hospitals, commercial/private laboratories, physician offices/group practices, cancer clinics and ambulatory care centers in seven countries.

In addition to primary sources of information, a comprehensive review of the most recent technical and business publications, manufacturer product literature, patents, trade association surveys, government studies, marketing and technical meeting presentations, industry analyst reports, and VPG's proprietary data files was conducted.

Contains 1,200 pages and 450 tables



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- HER-2/neu
- HPC1 HSTF





L-myc MET MSH NEU N-myc N-telopeptide PCA3 PIK3CA PTI-1 P10 P40 P51 P53 Ras Reg RET sFas 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 Fa ctor-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)

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Macrophage Activating Factor 32. Immunohistochemical Stains 33. Emerging Tumor Markers N-Acetylglucosamine Actin Alpha-Actin Angiogenin Angiostatin **Antineuronal Antibodies** 7B2 B72.3 **B-Protein** Bax BCD-F9 BLCA-4 Blood Group Antigens A,B,H BTA CA CA 72-4/TAG-72 CA CA-242 CA-549 Cadherin CAM CAR-3 CD105 Cathepsin-D Chromogranin A and B Cluster 1 Antigen Cluster-5/5A Antigen **COX** Antigen CTA **CU18** Cyclin **DR-70** DU-PAN-2 Endometrial Bleeding Associated Factor Endostatin **Epithelial Membrane Antigen** FDP Feulgen Hydrolysis



Fibronectin FSH (1->3)-L-fucosyltransferase Gastrin-Releasing Peptide (GRP) GDCFP-15 Glucagon Glycoamines H23 HAAH hk3 HPA HSP27 Human Carcinoma Antigen **ICAM** Intermediate Filaments Cytokeratins/CK18/Cyfra 21-1 Desmin **Gliofibrillary Acid Protein Neurofilaments** Vimentin KA Kallikrein **Kinases KP16D3** LAI Leukocyte Common Antigen Lewis Antigens Lysophosphatidic Acid (LPA) Ma 695/Ma MABDF3 MAG ME1 Minactivin MN/CA9 MSA Mucin Cancer Antigen (MCA) Multiple Tumor Suppressor Myosin **NEA-130**



NMP22 Nucleolar OA-519 **Opiod Peptides** P-glycoprotein Pancreatic Oncofetal Antigen (POA) Parathyrcoid Hormone **Placental Lactogen PR92** Proliferative Index, Ki-67 Px **RB** Inactivation/Deletion Ret S-100 Protein SCCL Selectin Serotonin Sialic Acid Sialyl SSEA-1/SLX **SN10** Somatostatin **TA-90** TABA Tachykinin TAG TPS Troponin Tubulin VCAM VEGF Villen White Blood Cell Markers C. Instrumentation Review And Market Needs 1. Abbott AxSYM 2. Abbott IMx

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DAP-PCR

Immuno-PCR





CAR

DNA

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- LCR
- NASBA
- QBR
- SDA
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DESIGN CRITERIA FOR DECENTRALIZED TESTING PRODUCTS

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Diagnocure

Diasorin

Eiken Chemical

Enterix

Enzo Biochem

Epigenomics

Exact Sciences

Fujirebio

Gen-Probe

Guided Therapeutics

Hologic

Ipsogen

J&J Diagnostics

Kreatech

Kyowa Medex

Mackay Life Sciences

Matritech

Myriad Genetics

OncoLab

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PreMD

Qiagen

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Wallac

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Japan, PAP Test Volume and Diagnostics Sales Forecast by Market Segment Japan, PSA Test Volume and Diagnostics Sales Forecast by Market Segment Japan, S-100 Protein Test Volume and Diagnostics Sales Forecast by Market Segment Japan, Serotonin Test Volume and Diagnostics Sales Forecast by Market Segment Japan, Sialic Acid Test Volume and Diagnostics Sales Forecast by Market Segment Japan, Squamous Cell Carcinoma Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

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

Japan, Thyroglobulin Test Volume and Diagnostics Sales Forecast by Market Segment Japan, TPA, Test Volume and Diagnostics Sales Forecast by Market Segment Japan, Total Tumor Marker Sales by Major Supplier

Japan, AFP Testing Market Diagnostics Sales by Major Supplier



Segment

Japan, CA 15-3/27.29 Testing Market Diagnostics Sales by Major Supplier Japan, CA 19-9 Testing Market Diagnostics Sales by Major Supplier Japan, CA 125 Testing Market Diagnostics Sales by Major Supplier Japan, Calcitonin Testing Market Diagnostics Sales by Major Supplier Japan, CEA Testing Market Diagnostics Sales by Major Supplier Japan, NSE Testing Market Diagnostics Sales by Major Supplier Japan, PAP Testing Market Diagnostics Sales by Major Supplier Japan, PSA Testing Market Diagnostics Sales by Major Supplier Japan, Tumor Marker Testing Instrumentation, Major System Estimated Placements and Installed Base By Supplier and Model Executive Summary Table: Spain, Total Tumor Marker Test Volume and Sales Forecast by Market Segment Spain, Estimated Cancer Death Rates Per 100,000 Population Spain, Laboratories Performing Tumor Marker Tests by Market Segment Spain, Hospital Laboratories Performing Tumor Marker Tests by Bed Size Spain, Commercial/Private Laboratories Performing Tumor Markers by Annual Test Volume Spain, Total Tumor Marker Test Volume Forecast by Market Segment Spain, All Market Segment Major Cancer Diagnostic Test Volume Forecast Spain, Hospital Laboratories Major Cancer Diagnostic Test Volume Forecast by Test Spain, Commercial/Private Laboratories Major Tumor Marker Test Volume Forecast Spain, Total Tumor Marker Sales Forecast by Market Segment Spain, All Market Segments Major Tumor Marker Sales Forecast by Test Spain, Hospital Laboratories Major Tumor Marker Sales Forecast by Test Spain, Commercial/Private Laboratories Major Tumor Marker Sales Forecast by Test Spain, AFP Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Beta-2 Microglobulin Test Volume and Diagnostics Sales Forecast by Market Segment Spain, CA 15-3 Test Volume and Diagnostics Sales Forecast by Market Segment Spain, CA 19-9 Test Volume and Diagnostics Sales Forecast by Market Segment Spain, CA-125 Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Calcitonin Test Volume and Diagnostics Sales Forecast by Market Segment Spain, CEA Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Colon-Specific Antigen Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Estrogen Receptor Test Volume and Diagnostics Sales Forecast by Market

Spain, Ferritin Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Gastrin Test Volume and Diagnostics Sales Forecast by Market Segment



Spain, HCG Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Insulin Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Lymphocyte Subtyping Test Volume and Diagnostics Sales Forecast by Market Segment

Spain, NSE Test Volume and Diagnostics Sales Forecast by Market Segment

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

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

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

Spain, PAP Smear Test Volume and Diagnostics Sales Forecast by Market Segment Spain, Parathyroid Hormone Test Volume And Diagnostics Sales Forecast by Market Segment

Spain, Progesterone Receptor Test Volume and Diagnostics Sales Forecast by Market Segment

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

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

Spain, S-100 Protein Test Volume And Diagnostics Sales Forecast by Market Segment

Spain, Serotonin Test Volume and Diagnostics Sales Forecast by Market Segment

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

Spain, Squamous Cell Carcinoma Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

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

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

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

Spain, Total Tumor Marker Sales by Major Supplier

Spain, AFP Testing Market Diagnostics Sales by Major Supplier

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

Spain, 19-9 Testing Market Diagnostics Sales by Major Supplier

Spain, CA 125 Testing Market Diagnostics Sales by Major Supplier

Spain, CEA Testing Market Diagnostics Sales by Major Supplier

Spain, PSA Testing Market Diagnostics Sales by Major Supplier

Spain, Tumor Marker Testing Instrumentation

Major Systems Estimated Placements and Installed Base by Supplier and Model

Executive Summary Table: U.K., Total Tumor Marker Test Volume and Sales Forecast by Market Segment

U.K., Estimated Cancer Death Rates Per 100,000 Population

U.K., Laboratories Performing Tumor Marker Tests by Market Segment



U.K., Hospital Laboratories Performing Tumor Marker Tests by Bed Size

U.K., Commercial/Private Laboratories Performing Tumor Marker Tests by Annual Test Volume

U.K., Total Tumor Marker Testing Volume Forecast by Market Segment

U.K., All Market Segments Major Tumor Marker Test Volume Forecast

U.K., Hospital Laboratories Major Tumor Marker Test Volume Forecast by Assay

U.K., Commercial/Private Laboratories Major Tumor Marker Test Volume Forecast

U.K., Total Tumor Marker Sales Forecast by Market Segment

U.K., All Market Segments Major Tumor Marker Sales Forecast by Test

U.K., Hospital Laboratories Major Tumor Marker Sales Forecast by Test

U.K., Commercial/Private Laboratories Major Tumor Marker Sales Forecast by Test

U.K., ACTH Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., AFP Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Beta-2 Microglobulin Test Volume and Diagnostics Sales Forecast by Market Segment

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

U.K., CA 19-9 Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., CA-125 Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Calcitonin Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., CEA Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Colon-Specific Antigen Test Volume And Diagnostics Sales by Market Segment

U.K., Cytokeratins Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Estrogen Receptor Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Ferritin Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Gastrin Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., HCG Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Insulin Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Lymphocyte Subtyping Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., NSE Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Occult Blood Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Oncogenes Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Pancreatic Oncofetal Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., PAP Smear Test Volume and Diagnostics Sales Forecast by Market Segment U.K., Parathyroid Hormone Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Progesterone Receptor Test Volume and Diagnostics Sales Forecast by Market



Segment

U.K., PAP Test Volume and Diagnostics Sales Forecast by Market Segment

- U.K., PSA Test Volume and Diagnostics Sales Forecast by Market Segment
- U.K., S-100 Protein Test Volume and Diagnostics Sales Forecast by Market Segment
- U.K., Serotonin Test Volume and Diagnostics Sales Forecast by Market Segment
- U.K., Sialic Acid Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Squamous Cell Carcinoma Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., TDT Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Thymidine Kinase Test Volume and Diagnostics Sales Forecast by Market Segment

U.K., Thyroglobulin Test Volume and Diagnostics Sales Forecast by Market Segment

- U.K., TPA Test Volume and Diagnostics Sales Forecast by Market Segment
- U.K., Total Tumor Marker Sales and Market Shares Forecast
- U.K., CEA Testing Market Diagnostics Sales by Major Supplier
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U.K., Tumor Marker Testing Instrumentation Major Systems

Estimated Placements and Installed Base By Supplier and Model

Executive Summary Table: U.S., Total Tumor Marker Test Volume and Sales Forecast by Market Segment

U.S., Estimated New Cancer Cases and Deaths

- U.S., Estimated Cancer Death Rates Per 100,000 Population
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- U.S., Hospital Laboratories Performing Tumor Marker Tests by Bed Size

U.S., Commercial/Private Laboratories Performing Tumor Marker Tests by Annual Test Volume

- U.S., Physician Office Laboratories Performing Tumor Marker Tests by Practice Size
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- U.S., All Market Segments Major Tumor Marker Test Volume Forecast
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- U.S., Commercial/Private Laboratories Major Tumor Marker Test Volume Forecast
- U.S., Physician Offices/Group Practices Major Tumor Marker Test Volume Forecast
- U.S., Cancer Clinics Major Tumor Marker Test Volume Forecast by Assay
- U.S., Total Tumor Marker Sales Forecast by Market Segment
- U.S., All Market Segment Major Tumor Marker Sales Forecast by Test
- U.S., Hospital Laboratories Major Tumor Marker Sales Forecast by Test
- U.S., Commercial/Private Laboratories Major Tumor Marker Sales Forecast by Test
- U.S., Physician Offices/Group Practices Major Tumor Marker Sales Forecast by Test
- U.S., Cancer Clinics Major Tumor Marker Sales Forecast by Test



U.S., ACTH Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., AFP Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Beta-2 Microglobulin Test Volume and Diagnostics Sales Forecast by Market Segment

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

U.S., CA 19-9 Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., CA-125 Test Volume and Diagnostics Sales Forecast by Market Segment

- U.S., Calcitonin Test Volume and Diagnostics Sales Forecast by Market Segment
- U.S., Cathepsin Test Volume and Diagnostics Sales Forecast by Market Segment
- U.S., CEA Test Volume and Diagnostics Sales by Market Segment

U.S., Chromogranin Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Colon-specific Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Cytokeratins Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Estrogen Receptor Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Ferritin Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Gastrin Test Volume and Diagnostics Sales Forecast by Market Segment

- U.S., HCG Test Volume and Diagnostics Sales Forecast by Market Segment
- U.S., Insulin Test Volume and Diagnostics Sales Forecast by Market Segment
- U.S., Interferons Test Volume and Diagnostics Sales Forecast by Market Segment
- U.S., Interleukins Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Lymphocyte Subtyping Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., NSE Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Nucleolar Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Occult Blood Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Oncogenes Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Pancreatic Oncofetal Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., PAP Smear Test Volume and Diagnostics Sales Forecast by Market Segment U.S., Parathyroid Hormone Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Progesterone Receptor Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., PAP Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., PSA Test Volume and Diagnostics Sales Forecast by Market Segment

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

U.S., Serotonin Test Volume and Diagnostics Sales Forecast by Market Segment



U.S., Sialic Acid Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Squamous Cell Carcinoma Antigen Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., TDT Test Volume and Diagnostics Sales Forecast by Market Segment

U.S., Thymidine Kinase Test Volume and Diagnostics Sales Forecast by Market Segment

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- U.S., Ferritin Testing Market Diagnostics Sales by Major Supplier
- U.S., HCG Testing Market Diagnostics Sales by Major Supplier
- U.S., Insulin Testing Market Diagnostics Sales by Major Supplier
- U.S., PAP Testing Market Diagnostics Sales by Major Supplier
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- U.S., Tumor Marker Testing Instrumentation
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