INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

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World *In Vitro* Diagnostic Products

Industry Study with Forecasts for **2015 & 2020**

Study #2724 | March 2011 | $6100 | 438 pages

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WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

Based on the advanced nature of medical delivery systems and the widespread health insurance coverage of residents, developed countries will claim about three-fourths of world demand.

World demand to rise 7.1% annually through 2015

World demand for in vitro diagnostic (IVD) products will increase 7.1 percent annually through 2015. Based on the advanced nature of medical delivery systems and the widespread health insurance coverage of residents, the developed countries combined will absorb about three-fourths of the total. The US will remain the largest market for IVD products, based on aging demographic patterns, a high health care spending intensity, the favorable receptiveness of medical providers to new reagents and instruments, and overall trends promoting the use of patient tests to detect diseases in early, more treatable stages.

World IVD Product Demand
($43.8 billion, 2010)

Developing world demand for IVD products will rise much faster than developed world demand as countries upgrade and expand health care systems. These improvements will boost the volume of patient tests, especially in China and other emerging economies. Nonetheless, IVD product demand in developing areas will remain largely in low cost reagents and instruments for basic health screening.

Molecular diagnostics, pathology products to lead gains

Increasing use in patient health screening, coupled with advances in integrated and point-of-care systems with greater productivity, will boost world demand for clinical chemistry products through 2015. Over the same period, the global market for immunoassay products will rise at a faster annual rate. Expansion of test menus for therapeutic drug monitoring, infectious disease detection, and cancer and heart condition testing, along with advances in chemiluminescent systems, will promote gains.

World demand for diabetes testing products will expand at an above-average rate through 2015. An increasing base of diagnosed patients, ongoing efforts by medical groups to encourage regular self-testing by diabetes patients, and advances in the ease-of-use properties of test strips and monitors will account for growth. Blood testing products will be the slowest growing segment, with gains fostered by uses in basic patient screening, cancer testing and coagulation monitoring.

Molecular diagnostic products will post the fastest growth in global demand among all IVD products based on throughput, accuracy and speed advantages, especially in the detection of infectious diseases and cancer markers. Pathology and cellular analysis products will also realize strong global growth opportunities, the former from expanding uses in tumor detection and autopsies; the latter from increasing applications in ovarian and breast cancer testing and HIV monitoring.

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Sample Text, Table & Chart

TABLE VI-6

CHINA: IVD PRODUCT DEMAND
(million dollars)

Item	2000	2005	2010	2015	2020
IVD Tests (million)					
$ products/test					
IVD Product Demand					
By Technology:					
Clinical Chemistry					
Immunoassay					
Diabetes Testing					
Blood Testing					
Molecular Diagnostics					
Pathology					
Cellular Analysis					
Microbiology					
By Type:					
Reagents & Consumables					
Instruments & Systems					
net exports					
IVD Product Shipments					

SAMPLE TABLE

ASIA/PACIFIC

China: IVD Product Demand

Total IVD product demand in China will increase ... in 2015. The improving availa... ...re services will underlie the ra... ...mand. China's hospital admiss... ...sting rates will rise as the healt... ...pitals will continue to dominat... ...ncluding IVD testing, in China... ...ost doctors. The country lacks... network of outpatient facilities and physicians' offices. ... dents must usually go to the hospital to receive diagnos...

SAMPLE TEXT

Due to persisting imbalances in the distribution of ... resources, China's per capita consumption of IVD prod... below the Asia/Pacific average through 2015. Moreove... remain concentrated in commodity-based reagents and ... only a small percentage of residents have access to advanced testing procedures. The country's demand for higher value-added IVD products, such as molecular diagnostic assays and systems, will remain small, at least in the near term.

China is emerging as a leading worldwide producer of IVD products. Most major industry competitors, including Beckman Coulter, Becton Dickinson, Johnson & Johnson, Roche and Siemens Healthcare Diagnostics, conduct manufacturing operations in the country through subsidiaries, joint ventures and/or outsourcing agreements... China will account for the second-largest global value of I... shipments or $4.5 billion, lagging only the United States a... ing a trade surplus of $870 million.

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CHART VIII-1

WORLD IVD PRODUCTS MARKET SHARE BY COMPANY
($43.8 billion, 2010)

SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-5

CHINA: HEALTH CARE INDICATORS

Item	2000	2005	2010	2015	2020
Population (million)	1265	1303	1337	1374	1406
% 65 years & older	6.8	7.6	8.2	9.5	11.7
Population 65 Years & Older (million)					
per capita GDP					
Gross Domestic Product (bil 2009$)					
per capita health expenditures					
Health Expenditures (bil $)					
beds/000 capita					
Acute Care Hospital Beds (000)					
physicians/000 capita					
Practicing Physicians (000)					
admissions/000 capita					
Acute Care Hospital Admission (000)					
surgical procedures/000 capita					
Surgical Procedures (000)					
outpatient consultations/capita					
Outpatient Consultations (million)					
IVD tests/capita					
IVD Tests (million)					

SAMPLE TABLE

COMPANY PROFILES

Affymetrix Incorporated
3420 Central Expressway
Santa Clara, CA 95051
408-731-5000
http://www.affymetrix.com

Revenues
Geograph ... S 57
26%, Japa
Employm

Key Produ ... gnos
applicatio

SAMPLE PROFILE

Affym ... nolog
ing, analyzing and managing complex genetic informatio
biomedical research and clinical health care applications
ny's products and services are used by pharmaceutical, biotechnology, agrochemical, diagnostics and consumer products companies, as well as academic research centers, government research laboratories, private foundations and clinical reference laboratories in North America, Europe and the Asia/Pacific region.

Affymetrix participates in the world in vitro diagnostic industry through the production of microarray systems for molecular diagnostic applications. The Company's microarray systems, which are marketed primarily under the GENECHIP brand name, are used for gene expression and genotyping analysis for diagnostic and other applications. These systems are composed of disposable DNA probe arrays, reagents for use with the probe arrays, a scanner and other instruments for processing the probe arrays, and related software for analyzing and managing genomic and genetic information.

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"China will continue to experience rapid growth in health care spending over the long term as the population ages and government reforms improve the availability of basic and medical treatment. Through 2015, total health expenditures will increase over eleven percent annually to $970 billion, or over $700 per capita. Beyond growth, outlays for medical products and services will be allocated more efficiently and effectively than in the past."
--Section VI, pg. 225

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Other Studies

Excipients

This study analyzes the US excipients industry. It presents historical demand data (2000, 2005, 2010) and forecasts for 2015 and 2020 by product (e.g., gelatin, cellulose derivatives, synthetic polymers, minerals, starch compounds, sugars, polyols, sterile and purified waters, surfactants) and application (e.g., fillers/diluents, capsules, binders, drug delivery agents, suspension/viscosity agents, coatings). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry players.

#2736 .... April 2011 .... $4800

Enzymes

US demand for enzymes will rise 4.8 percent annually through 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the $2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 .... September 2010................ $4900

World Disposable Medical Supplies

Global demand for disposable medical supplies will increase 5.6 percent annually through 2014, with developed countries accounting for nearly three-fourths of the market. Wound management supplies will remain the top-selling group while diagnostic and laboratory disposables grow the fastest. This study analyzes the $125 billion world disposable medical supply industry, with forecasts for 2014 and 2019 by product, world region and for 14 countries. It also evaluates company market share and profiles industry competitors.

#2691 .... December 2010 .... $5900

Vaccines

US demand for vaccines will advance 5.6 percent annually through 2014, driven by the development of new vaccines to treat complex human diseases, such as cancer. Public health recommendations for adult and adolescent immunization will produce continued strong sales in this segment, which has reached the level of pediatric vaccines sales. This study analyzes the $10.8 billion US vaccines industry, with forecasts for 2014 and 2019 by product. It also evaluates company market share and profiles US industry competitors.

#2667 .... August 2010.................. $4700

Nanotechnology in Health Care

US demand for nanosized medical products will grow 17.1 percent yearly through 2014. Cancer and central nervous system disorders will be the fastest growing applications. Nanomedicines will provide the best opportunities, while nanotech medical supplies and devices grow the fastest from a small base. This study analyzes the $34.2 billion US nanotechnology medical product industry, with forecasts for 2014 and 2019 by product and application. It also evaluates company market share and profiles industry participants.

#2622 .... June 2010 .... $4800

About The Freedonia Group

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