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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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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.

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**

ASIA/PACIFIC

China: IVD Product Demand

Total IVD product demand in China will increase in 2015. The improving availability of diagnostic services will underlie the rapid demand. China's hospital admission rates will rise as the health system continues to dominate, including IVD testing, in China. The country lacks a network of outpatient facilities and physicians' offices. Patients must usually go to the hospital to receive diagnosis.

Due to persisting imbalances in the distribution of resources, China's per capita consumption of IVD products will remain below the Asia/Pacific average through 2015. Moreover, demand remains 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 IVD shipments or \$4.5 billion, lagging only the United States and having a trade surplus of \$870 million.

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TABLE VI-6

**CHINA: IVD PRODUCT DEMAND
 (million dollars)**

Item	2000	2005	2010	2015	2020
IVD Tests (million)	2,000	2,500	3,000	3,500	4,000
\$ products/test	10	12	15	18	20
IVD Product Demand	20,000	30,000	45,000	63,000	80,000
By Technology:					
Clinical Chemistry	10,000	15,000	20,000	25,000	30,000
Immunoassay	5,000	7,000	9,000	11,000	13,000
Diabetes Testing	1,000	1,500	2,000	2,500	3,000
Blood Testing	1,000	1,500	2,000	2,500	3,000
Molecular Diagnostics	1,000	1,500	2,000	2,500	3,000
Pathology	1,000	1,500	2,000	2,500	3,000
Cellular Analysis	1,000	1,500	2,000	2,500	3,000
Microbiology	1,000	1,500	2,000	2,500	3,000
By Type:					
Reagents & Consumables	15,000	22,500	33,750	47,250	60,000
Instruments & Systems	5,000	7,500	11,250	15,750	20,000
net exports	0	0	0	0	0
IVD Product Shipments	20,000	30,000	45,000	63,000	80,000

**SAMPLE
 TEXT**

**SAMPLE
 TABLE**

CHART VIII-1

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



**SAMPLE
 CHART**

Sample Profile, Table & Forecast

COMPANY PROFILES

Affymetrix Incorporated

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

Revenues
 Geograph \$ 57
 26%, Japa
 Employm

Key Prod
 applicatio

**SAMPLE
PROFILE**

Affymetrix is a leading provider of genomics technology, analyzing and managing complex genetic information for biomedical research and clinical health care applications. The Company'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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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**

"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

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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