

# 2014 Opportunities in the US Cancer Diagnostics Market

## Table of Contents

### **I. Introduction**

### **II. Major Product Development Opportunities**

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

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

### **IV. 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

### **V. 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

## Table of Contents

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

#### A. Cancer Statistics and Etiology

1. Breast 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. Carcinoembryonic 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

## Table of Contents

- 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

## Table of Contents

- 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

## Table of Contents

- 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
- Opioid Peptides
- P-glycoprotein
- Pancreatic Oncofetal Antigen (POA)
- Placental Lactogen
- PR92

## Table of Contents

- 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

### D. Current and Emerging Technologies

1. 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

## Table of Contents

3. Molecular Diagnostics
  - a. Technology Overview
  - b. Amplification Methods
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

## **VII. U.S.A.**

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

## **VIII. Competitive Profiles**

- Abbott
- AdnaGen
- Agilent Technologies
- Applied Gene Technologies
- Arca/Nuvelo
- Beckman Coulter/Danaher
- Becton Dickinson
- Biomedical Diagnostics

## Table of Contents

- bioMerieux
- Bio-Rad
- CellSearch
- Cepheid
- Correlogic Systems/Vermillion
- Decode
- Diadexus
- Diagnocure
- Diasorin
- Eiken Chemical
- Epigenomics
- Enterix
- Enzo Biochem
- Exact Sciences
- Fujirebio/Innogenetics
- Guided Therapeutics
- Hologic/Gen-Probe
- Kreatech
- Kyowa Medex
- Life Technologies
- Mackay Life Sciences
- Myriad Genetics
- Nanogen Elitech
- OncoLab
- Ortho-Clinical Diagnostics
- Panacea Pharmaceuticals
- Polartech
- Polymedco
- PreMD
- Qiagen/Ipsogen
- Quest Diagnostics
- Radient Pharmaceuticals
- Roche
- Scienion
- Sequenom
- Siemens Healthcare
- Takara Bio
- Targeted Diagnostics & Therapeutics
- Tosoh
- Veridex
- Wako Pure Chemicals
- Wallac/PE
- Zila



## **Table of Contents**

**IX. Appendixes: Appendix I:** Major Universities and Research Centers Developing Cancer Diagnostic Technology and Applications

**Appendix II:** Assumed Currency Exchange Rates

## **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

## **List of Tables**

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

## **List of Tables**

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

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

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

U.S., Total Tumor Marker Test Volume  
Forecast by Market Segment

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

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

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 Test

## **List of Tables**

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

## **List of Tables**

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

## **List of Tables**

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

## **List of Tables**

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

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

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

U.S., Total Tumor Marker Sales  
By Major Supplier

U.S., ACTH Testing Market Diagnostics  
Sales by Major Supplier

U.S., AFP Testing Market Diagnostics  
Sales by Major Supplier

U.S., Beta-2 Microglobulin Testing Market Diagnostics Sales  
by Major Supplier

U.S., CA 15-3/27.29 Testing Market  
Diagnostics Sales by Major Supplier

U.S., CA 19-9 Testing Market Diagnostics  
Sales by Major Supplier

U.S., CA 125 Testing Market Diagnostics  
Sales by Major Supplier

U.S., CEA Testing Market Diagnostics  
Sales by Major Supplier



## **List of Tables**

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., Parathyroid Hormone Testing Market  
Diagnostics Sales by Major Supplier

U.S., PAP Testing Market Diagnostics  
Sales by Major Supplier

U.S., Progesterone Receptor Testing Market  
Diagnostics Sales by Major Supplier

U.S., PSA Testing Market Diagnostics  
Sales by Major Supplier