

ITALIAN CHEMISTRY AND IMMUNODIAGNOSTICS MARKETS

Table of Contents

Introduction

Worldwide Market and Technology Overview

A. Major Routine Chemistry Tests

1. Albumin
2. Alkaline Phosphatase
3. ALT/SGPT
4. Ammonia
5. Amylase
6. AST/SGOT
7. Bilirubin, Total
8. Blood Gases
9. Blood Urea Nitrogen (BUN)
10. Calcium
11. Cardio CRP
12. Cholesterol
13. Cholinesterase
14. CRP
15. Creatinine
16. Electrolytes
 - a. Carbon Dioxide/Bicarbonate
 - b. Chloride
 - c. Potassium
 - d. Sodium
17. Ferritin
18. Fructosamine
19. Gamma-Glutamyl Transpeptidase (GGT)
20. Glucose
21. High Density Lipoprotein (HDL)
22. Homocysteine
23. Iron
24. Lactate Dehydrogenase (LDH)
25. Magnesium
26. Phosphorus
27. Protein
28. Triglycerides
29. Uric Acid
30. Troponin

Table of Contents (Continued)

B. Therapeutic Drug Monitoring (TDM)

1. Overview
2. Carbamazepine
3. Cyclosporin
4. Digoxin
5. Everolimus
6. Gentamicin
7. Lamotrigine/Lamictal
8. Levetiracetam
9. Lidocaine
10. Lithium
11. NAPA/Procainamide
12. Phenytoin
13. Quinidine
14. Sirolimus
15. Tacrolimus
16. Theophylline
17. Topiramate
18. Valproic Acid

C. Endocrine Function Tests

1. Cortisol
2. Follicle-Stimulating Hormone (FSH)
3. Gastrin
4. Growth Hormone/IGF-1
5. Human Chorionic Gonadotropin (HCG)
6. LH
7. PTH/IO PTH
8. Prolactin
9. T3
10. T3 Free
11. T3 Uptake
12. T4 (Thyroxine)
13. T4 Free
14. TBG
15. Thyroglobulin Ab
16. TPO Ab
17. TSH

Table of Contents (Continued)

D. Tumor Markers And Special Chemistry Tests

1. AFP
2. CA 15-3
3. CA 19-9
4. CA 27-29
5. Carcinoembryonic Antigen (CEA)
6. Folate/Folic Acid
7. HCG
8. 25-Hydroxy Vitamin D2 and D3
9. Occult Blood
10. Prostate-Specific Antigen (PSA)
11. Thyroglobulin
12. Vitamin B-12

E. Immunoprotein Tests

1. Complement
 - a. C3
 - b. C4
2. Free Light Chains
3. Immunofixation
4. Immunoglobulins (IgA, IgE, IgG, IgM)
5. Haptoglobin
6. Prealbumin
7. Protein Electrophoresis

F. Drugs of Abuse

1. Overview
2. Test Methodologies
3. Amphetamines
4. Barbiturates
5. Benzodiazepines
6. Cannabinoids/Marijuana
7. Cocaine
8. Lysergic Acid Diethylamide (LSD)
9. Methadone
10. Methaqualone
11. Opiates
12. Phencyclidine
13. Tricyclic Antidepressants

Table of Contents (Continued)

G. Instrumentation Review: Operating Characteristics and Features of High-, Medium-, and Low- Volume/POC Analyzers Manufactured By:

- Abaxis
- Abbott
- Alere/Inverness
- Alfa Wassermann
- AMS
- Awareness Technologies
- Beckman Coulter/Olympus
- Binding Site
- bioMerieux
- Carolina Chemistries
- DiaSorin
- Grifols
- Horiba
- Medica
- Nova Biomedical
- Ortho-Clinical Diagnostics
- Polymedco
- Randox
- Roche
- Siemens
- Tosoh
- Vital Diagnostics

H. Major In Vitro Diagnostic Technologies And Their Potential Applications

1. Monoclonal and Polyclonal Antibodies
2. Immunoassays
 - a. Technological Principle
 - d. Chemiluminescence
 - c. Enzyme Immunoassays (EIA)
 - Overview
 - ELISA
 - EMIT
 - Electrochemical

Table of Contents (Continued)

- d. Radioimmunoassays (RIA)
- e. Immunoprecipitation
- f. Affinity Chromatography

- 3. Tandem Mass Spec
- 4. IT and Automation
- 5. Dry Chemistry
- 6. Biosensors

Italy

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

Major Product Development Opportunities

Design Criteria for Decentralized Testing Products

Alternative Market Penetration Strategies

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

Table of Contents (Continued)

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 Assessments

- Abbott Laboratories
- AdnaGen
- Beckman Coulter/Danaher
- Biomedical Diagnostics
- BioMerieux
- Bio-Rad
- Dako
- DiaSorin
- Eiken
- Fujirebio
- Instrumentation Laboratory
- Kyowa Medex
- Matritech
- Ortho-Clinical Diagnostics
- Roche
- Siemens
- Sysmex
- Thermo Fisher
- Tosoh
- Wako
- Wallac/PE

List of Tables

Major Companies Developing or Marketing
Albumin Tests

Major Companies Developing or Marketing
Alkaline Phosphatase Tests

Major Companies Developing or Marketing
ALT/SGPT Tests

Major Companies Developing or Marketing
Amylase Tests

Major Companies Developing or Marketing
AST/SGOT Tests

Major Companies Developing or Marketing
Bilirubin Tests

Major Companies Developing or Marketing
Blood Gas Analyzers

Major Companies Developing or Marketing
BUN Tests

Major Companies Developing or Marketing
Calcium Tests

Major Companies Developing or Marketing
Cholesterol Tests

Major Companies Developing or Marketing
Creatinine Tests

Major Companies Developing or Marketing
Electrolyte Tests

List of Tables (continued)

Major Companies Developing or Marketing
GGT Tests

Major Companies Developing or Marketing
Glucose Tests

Major Companies Developing or Marketing
HDL Tests

Major Companies Developing or Marketing
Iron Tests

Major Companies Developing or Marketing
LDH Tests

Major Companies Developing or Marketing
Magnesium Tests

Major Companies Developing or Marketing
Phosphorus Tests

Major Companies Developing or Marketing
Protein Tests

Major Companies Developing or Marketing
Triglycerides Tests

Major Companies Developing or Marketing
Uric Acid Tests

Major Companies Developing or Marketing
TDM Tests

Major Companies Developing or Marketing
Digoxin Tests

Major Companies Developing or Marketing
Lithium Tests

Major Companies Developing or Marketing
Phenytoin/Dilantin Tests

List of Tables (continued)

Major Companies Developing or Marketing
Theophylline Tests

Major Companies Developing or Marketing
Valproic Acid Tests

Major Companies Developing or Marketing
FSH Tests

Major Companies Developing or Marketing
HCG Tests

Major Companies Developing or Marketing
LH Tests

Major Companies Developing or Marketing
Prolactin Tests

Major Companies Developing or Marketing
T3 Tests

Major Companies Developing or Marketing
T4 Tests

Major Companies Developing or Marketing
TSH Tests

Major Companies Developing or Marketing
AFP Tests

Major Companies Developing or Marketing
CEA Tests

Major Companies Developing or Marketing
Ferritin Tests

Major Companies Developing or Marketing
Occult Blood Tests

Major Companies Developing or Marketing
Prostatic Acid Phosphatase Tests

List of Tables (continued)

Major Companies Developing or Marketing
PSA Tests

Major Companies Developing or Marketing
Vitamin B-12/Folate Tests

Major Companies Developing or Marketing
CRP Tests

Major Companies Developing or Marketing
Drugs of Abuse Tests

Major Companies Developing or Marketing
Biosensors for Clinical Chemistry Testing

Executive Summary Table: Italy, Clinical
Chemistry and Immunoassay Test Volume and
Diagnostics Sales Forecast By Test Category

Italy, Laboratories Performing Chemistry
and Immunoassay Tests By Market Segment

Italy, Hospital Laboratories Performing
Chemistry and Immunoassay Tests
By Bed Size

Italy, Commercial/Private Laboratories
Performing Chemistry and Immunoassay
Tests By Annual Test Volume

Italy, Total Chemistry and Immunoassay
Specimen Volume Forecast

Italy, All Market Segments, Specimen
Volume Forecast By Test Category

Italy, Total Clinical Chemistry and Immunoassay
Test Volume Forecast By Test Category

Italy, Routine Chemistry Test Volume
Forecast By Market Segment

List of Tables (continued)

Italy, Endocrine Function Test Volume
Forecast By Market Segment

Italy, Tumor Markers and Special Chemistry
Test Volume Forecast By Market Segment

Italy, Immunoprotein Test Volume
Forecast By Market Segment

Italy, TDM Test Volume Forecast
By Market Segment

Italy, Drugs of Abuse Test Volume
Forecast By Market Segment

Italy, All Market Segments, Profiles,
Panels and Individual Tests Forecast

Italy, Hospital Laboratories, Profiles,
Panels and Individual Tests Forecast

Italy, Commercial/Private Laboratories,
Profiles, Panels and Individual Tests Forecast

Italy, All Market Segments, Routine
Chemistry Test Volume Forecast
by Assay

Italy, Hospital Laboratories, Routine
Chemistry Test Volume Forecast
by Assay

Italy, Commercial/Private Laboratories,
Routine Chemistry Test Volume Forecast
by Assay

Italy, All Market Segments, Endocrine
Function Test Volume Forecast
by Assay

List of Tables (continued)

Italy, Hospital Laboratories, Endocrine
Function Test Volume Forecast
by Assay

Italy, Commercial/Private Laboratories,
Endocrine Function Test Volume Forecast
by Assay

Italy, All Market Segments, Tumor Markers
and Special Chemistry Test Volume Forecast by Assay

Italy, Hospital Laboratories, Tumor Markers
and Special Chemistry Test Volume Forecast by Assay

Italy, Commercial/Private Laboratories, Tumor
Markers and Special Chemistry Test Volume
Forecast by Assay

Italy, All Market Segments,
Immunoprotein Test Volume Forecast
by Assay

Italy, Hospital Laboratories,
Immunoprotein Test Volume Forecast
by Assay

Italy, Commercial/Private Laboratories,
Immunoprotein Test Volume Forecast
by Assay

Italy, All Market Segments, TDM
Test Volume Forecast by Assay

Italy, Hospital Laboratories, TDM
Test Volume Forecast by Assay

Italy, Commercial/Private Laboratories,
TDM Test Volume Forecast by Assay

Italy, All Market Segments, Drugs
of Abuse Test Volume Forecast by Assay

List of Tables (continued)

Italy, Hospital Laboratories, Drugs of Abuse Test Volume Forecast by Assay

Italy, Commercial/Private Laboratories, Drugs of Abuse Test Volume Forecast by Assay

Italy, Total Clinical Chemistry and Immunoassay Reagent Market Forecast By Test Category

Italy, Clinical Chemistry and Immunoassay Calibrator and Control Market Forecast By Test Category

Italy, Routine Chemistry Reagent Market Forecast By Market Segment

Italy, Endocrine Function Reagent Market Forecast By Market Segment

Italy, Tumor Markers and Special Chemistry Reagent Market Forecast By Market Segment

Italy, TDM Reagent Market Forecast By Market Segment

Italy, Immunoprotein Reagent Market Forecast By Market Segment

Italy, Drugs of Abuse Reagent Market Forecast By Market Segment

Italy, All Market Segments, Routine Chemistry Reagent Market Forecast by Assay

Italy, Hospital Laboratories, Routine Chemistry Reagent Market Forecast by Assay

List of Tables (continued)

Italy, Commercial/Private Laboratories,
Routine Chemistry Reagent Market Forecast
by Assay

Italy, All Market Segments, Endocrine
Function Reagent Market Forecast
by Assay

Italy, Hospital Laboratories, Endocrine
Function Reagent Market Forecast
by Assay

Italy, Commercial/Private Laboratories,
Endocrine Function Reagent Market Forecast
by Assay

Italy, All Market Segments, Tumor Markers
and Special Chemistry Reagent Market Forecast
by Assay

Italy, Hospital Laboratories, Tumor Markers
and Special Chemistry Reagent Market Forecast by Assay

Italy, Commercial/Private Laboratories,
Tumor Markers and Special Chemistry Reagent
Market Forecast by Assay by Assay

Italy, All Market Segments,
Immunoprotein Reagent Market Forecast
by Assay

Italy, Hospital Laboratories,
Immunoprotein Reagent Market Forecast
by Assay

Italy, Commercial/Private Laboratories,
Immunoprotein Reagent Market Forecast
by Assay

Italy, All Market Segments, TDM
Reagent Market Forecast by Assay

List of Tables (continued)

Italy, Hospital Laboratories, TDM
Reagent Market Forecast by Assay

Italy, Commercial/Private Laboratories,
TDM Reagent Market Forecast by Assay

Italy, All Market Segments, Drugs of
Abuse Reagent Market Forecast by Assay

Italy, Hospital Laboratories, Drugs of
Abuse Reagent Market Forecast by Assay

Italy, Commercial/Private Laboratories,
Drugs of Abuse Reagent Market Forecast
by Assay

Italy, Clinical Chemistry and Immunoassay
Instrument Market Forecast By Analyzer Type

Italy, Major Suppliers of Clinical
Chemistry Diagnostics Products, Estimated Sales
and Market Shares

Italy, Major Suppliers of Immunoassay
Diagnostic Products, Estimated Sales
and Market Shares