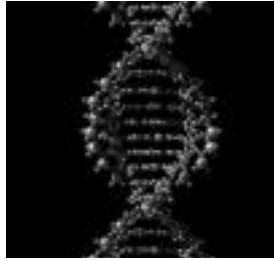




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Clinical Chemistry and Immunodiagnosics Markets

NEW PRODUCT DEVELOPMENT OPPORTUNITES
AND BUSINESS EXPANSION STRATEGIES
FOR INSTRUMENT AND REAGENT SUPPLIERS

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Rationale

During the next decade, the clinical chemistry and immunodiagnosics markets will undergo significant transformation. These changes will be caused by the convergence of new and more stringent regulations; advances in diagnostic technologies, system engineering, automation, and IT; and intensifying competition. Some segments, like routine chemistry, will start resembling commodity markets, where product positioning and cost per test are more critical than underlying technology. This evolving marketplace will create exciting opportunities for a variety of new instruments, reagent systems, and auxiliary products, such as specimen preparation devices, controls, calibrators and others.

"The Clinical Chemistry and Immunodiagnosics Markets" is a unique worldwide market intelligence and technology assessment study designed to help current suppliers and potential market entrants identify and evaluate emerging opportunities and develop effective strategic responses. The study explores future trends in the U.S., Europe and Japan; provides estimates of the specimen and test volumes, instrument placements, as well as major suppliers sales and market shares; compares features of leading analyzers; profiles key competitors; and identifies specific product and marketing opportunities facing suppliers during the next ten years.

Study Content

Geographic Coverage

The report presents detailed analyses of the chemistry and immunodiagnosics markets in the following seven countries:

- France
- Germany
- Italy
- Japan
- Spain
- U.K.
- U.S.A.

In addition to seven country assessments, a comprehensive 500-page worldwide market and technology overview is provided. The analysis of each country includes the following information:

Business Environment

Key issues of current chemistry and immunodiagnostic laboratory practice, as well as major technological, regulatory, economic, demographic, and social trends with significant market impact during the next ten years are explored for each of the seven countries.

Major Market Segments

- Hospitals
- Commercial/Private Labs
- Physician Offices
- Other Decentralized Locations

The hospital market is further segmented by bed size; the commercial laboratory market by sample volume; and the physician office market by practice size and specialty.

Specimen Volume Forecasts

For each market segment, the report provides five- and ten-year volume forecasts for the following specimens:

- Serum
- Whole Blood
- Plasma
- CSF
- Urine
- Others

Test Volume and Sales Projections

The study forecasts both volume and reagent sales for over 100 individual tests, as well as controls, calibrators and consumables within the following assay categories:

- Routine Chemistries
- Endocrine Function
- Immunoproteins
- TDM
- Tumor Markers
- Special Chemistries
- Drugs of Abuse

Instrumentation Review

Operating characteristics, features and selling prices are reviewed for over 100 chemistry, immunodiagnostic and immunoprotein analyzers, both currently marketed and those in development.

Market Share Analysis

The study provides sales and market share estimates for major suppliers of chemistry, immunodiagnostic and immunoprotein instruments, reagents, and consumables.

Technological Assessment

In this section, the report presents a detailed review of the following technologies and their market applications:

- Automation
- Biosensors
- Chemometrics
- Dry Chemistry
- Immunoassays
- IT
- Molecular Diagnostics
- Monoclonal and Polyclonal Antibodies
- Robotics

Market Needs and Opportunities

The study identifies the major opportunities facing chemistry and immunodiagnostic product suppliers during the next ten years, and proposes 'ideal' product models with tentative operating characteristics.

Competitive Analysis

Leading suppliers and recent market entrants are profiled in terms of their revenue, market shares, product portfolios, sales tactics, technological know-how, new products in R&D, collaborative arrangements and business strategies.

Abbott	Diasorin	Thermo Fisher
AdnaGen	Eiken	Trinity Biotech
Ambrilia	Fujirebio	Tosoh
AMDL	IL	Wako
Beckman Coulter	J&J	Wallac
Biomedical Diagnostics	Kyowa Medex	
bioMerieux	Matritech	
Bio-Rad	Roche	
Canag Diagnostics	Siemens	
Dako	Sysmex	

Business Opportunities and Strategic Recommendations

Based on the results of the study, the report proposes:

- Specific product development and business opportunities
- Alternative market penetration strategies
- Potential market entry barriers and risks
- Business planning issues and concerns

Methodology

The study is based on a combination of primary and secondary information sources, including comprehensive worldwide survey of technical and business periodicals, manufacturer product and financial literature, and industry analyst reports. Additional information was retrieved from VENTURE PLANNING GROUP's proprietary data files, developed during the firm's over 100 syndicated studies and numerous single-client assignments. This database contains current information on various healthcare and biotechnology markets, technologies, companies, products and executives worldwide.

Partial List of Tables

Following is a partial list of tables from Section IX: U.S.A. Other six country assessments contain similar tables. A complete list of all 600 tables is available on request.

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*Clinical Chemistry and Immunodiagnosics Markets: US, Europe, Japan
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Immunoprotein Reagent Market Forecast by Assay*

*U.K., All Market Segments, TDM
Reagent Market Forecast by Assay*

*U.K., Hospital Laboratories, TDM
Reagent Market Forecast by Assay*

*U.K., Commercial/Private Laboratories,
TDM Reagent Market Forecast by Assay*

*U.K., All Market Segments, Tumor Markers
and Special Chemistry Reagent Market Forecast by Assay*

*U.K., Hospital Laboratories, Tumor Markers
and Special Chemistry Reagent Market Forecast by Assay*

*U.K., Commercial/Private Laboratories,
Tumor Markers and Special Chemistry Reagent
Market Forecast by Assay*

*U.K., All Market Segments, Drugs of
Abuse Reagent Market Forecast by Assay*

*U.K., Hospital Laboratories, Drugs of
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*U.K., Clinical Chemistry and Immunoassay
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*U.K., Major Suppliers of Clinical Chemistry
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*Executive Summary Table: U.S.A., Clinical
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*U.S.A., Hospital Laboratories Performing
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*U.S.A., Commercial/Private Laboratories
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By Annual Test Volume*

*U.S.A., Total Chemistry and Immunoassay
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*U.S.A., All Market Segments, Specimen Volume
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*U.S.A., Total Clinical Chemistry and Immunoassay
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*U.S.A., Routine Chemistry Test Volume
Forecast By Market Segment*

U.S.A., TDM Test Volume Forecast By Market Segment

*U.S.A., Endocrine Function Test Volume
Forecast By Market Segment*

*U.S.A., Drugs of Abuse Test Volume
Forecast By Market Segment*

*U.S.A., Tumor Markers and Special Chemistry
Test Volume Forecast By Market Segment*

*U.S.A., Immunoprotein Test Volume
Forecast By Market Segment*

*U.S.A., All Market Segments, Profiles,
Panels and Individual Tests Forecast*

*U.S.A., Hospital Laboratories, Profiles,
Panels and Individual Tests Forecast*

*U.S.A., Commercial/Private Laboratories,
Profiles, Panels and Individual Tests Forecast*

*U.S.A., Physician Offices/Group Practices,
Profiles, Panels and Individual Tests Forecast*

*U.S.A., All Market Segments, Routine
Chemistry Test Volume Forecast by Assay*

*U.S.A., Hospital Laboratories, Routine
Chemistry Test Volume Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Routine Chemistry Test Volume Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Routine Chemistry Test Volume Forecast by Assay*

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*U.S.A., All Market Segments, TDM
Test Volume Forecast by Assay*

*U.S.A., Hospital Laboratories, TDM
Test Volume Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
TDM Test Volume Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
TDM Test Volume Forecast by Assay*

*U.S.A., All Market Segments, Endocrine
Function Test Volume Forecast by Assay*

*U.S.A., Hospital Laboratories, Endocrine
Function Test Volume Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Endocrine Function Test Volume Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Endocrine Function Test Volume Forecast by Assay*

*U.S.A., All Market Segments, Drugs
of Abuse Test Volume Forecast by Assay*

*U.S.A., Hospital Laboratories, Drugs
of Abuse Test Volume Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Drugs of Abuse Test Volume Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Drugs of Abuse Test Volume Forecast by Assay*

*U.S.A., All Market Segments, Tumor Markers
and Special Chemistry Test Volume
Forecast by Assay*

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*U.S.A., Hospital Laboratories, Tumor Markers
and Special Chemistry Test Volume Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Tumor Markers and Special Chemistry Test
Volume Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Tumor Markers and Special Chemistry Test
Volume Forecast by Assay*

*U.S.A., All Market Segments,
Immunoprotein Test Volume Forecast by Assay*

*U.S.A., Hospital Laboratories,
Immunoprotein Test Volume Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Immunoprotein Test Volume Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Immunoprotein Test Volume Forecast by Assay*

*U.S.A., Total Clinical Chemistry and Immunoassay
Reagent Market Forecast By Test Category*

*U.S.A., Clinical Chemistry and Immunoassay
Calibrator and Control Market Forecast By
Test Category*

*U.S.A., Routine Chemistry Reagent Market
Forecast By Market Segment*

U.S.A., TDM Reagent Market Forecast By Market Segment

*U.S.A., Drugs of Abuse Reagent Market
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*U.S.A., Tumor Markers and Special Chemistry
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*U.S.A., Endocrine Function Reagent Market
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*U.S.A., All Market Segments, Routine
Chemistry Reagent Market Forecast by Assay*

*U.S.A., Hospital Laboratories, Routine
Chemistry Reagent Market Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Routine Chemistry Reagent Market Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Routine Chemistry Reagent Market Forecast by Assay*

*U.S.A., All Market Segments, TDM
Reagent Market Forecast by Assay*

*U.S.A., Hospital Laboratories, TDM
Reagent Market Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
TDM Reagent Market Forecast by Assay*

*U.S.A., Physician Office/Group Practices,
TDM Reagent Market Forecast by Assay*

*U.S.A., All Market Segments, Drugs of
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*U.S.A., Hospital Laboratories, Drugs of
Abuse Reagent Market Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Drugs of Abuse Reagent Market Forecast by Assay*

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*U.S.A., Physician Offices/Group Practices,
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*U.S.A., All Market Segments, Endocrine
Function Reagent Market Forecast by Assay*

*U.S.A., Hospital Laboratories, Endocrine
Function Reagent Market Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Endocrine Function Reagent Market Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Endocrine Function Reagent Market Forecast by Assay*

*U.S.A., All Market Segments, Tumor Markers
and Special Chemistry Reagent Market Forecast by Assay*

*U.S.A., Hospital Laboratories, Tumor Markers
and Special Chemistry Reagent Market Forecast by Assay*

*U.S.A., Commercial/Private Laboratories,
Tumor Markers and Special Chemistry Reagent
Market Forecast by Assay*

*U.S.A., Physician Offices/Group Practices,
Tumor Markers and Special Chemistry Reagent
Market Forecast by Assay*

*U.S.A., All Market Segments,
Immunoprotein Reagent Market Forecast*

*U.S.A., Hospital Laboratories, Immunoprotein
Reagent Market Forecast Immunoprotein*

*U.S.A., Commercial/Private Laboratories,
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*U.S.A., Physician Offices/Group Practices,
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*U.S.A., Major Suppliers of Clinical Chemistry
Reagents, Estimated Sales and Market Shares*

*U.S.A., Major Suppliers of Clinical Chemistry
Analyzers, Estimated Instrument Sales and
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*U.S.A., Major Suppliers of Clinical Chemistry
Diagnostics Products, Estimated Sales and
Market Shares*

*U.S.A., Major Suppliers of Immunoassay
Reagents, Estimated Sales and Market Shares*

*U.S.A., Major Suppliers of Immunoassay
Analyzers, Estimated Instrument Sales and
Market Shares*

*U.S.A., Major Suppliers of Immunoassay
Diagnostics Products, Estimated Sales and
Market Shares*

*U.S.A., Clinical Chemistry and Immunoassay
Instrument Market Forecast By Analyzer Type*