#### Future of Molecular Diagnostics: Innovative Technologies Driving Market Opportunities

#### **Introduction**

The report analyzes current and potential world molecular diagnostics markets and advances in the field. The report forecasts future growth to 2015, and segments the market by test and geography. Also included are profiles of companies marketing key products, and analyses of key drivers.

#### **Scope**

- Explains how molecular diagnostics represents a business opportunity for the IVD industry.
- Evaluates drivers and trends behind the growth of molecular diagnostics.
- Reviews key challenges facing molecular diagnostic manufacturers and companies seeking to enter the market.
- Analyzes markets by key types of testing, product, and country, and reviews top products and opportunities.
- Profiles key players, including established companies and growing firms with innovative technologies.

#### **Research and Analysis Highlights**

Two important growth drivers in the clinical setting for molecular diagnostics include the need for new biomarker assays as well as for techniques that lower the cost per test, and which improve ease of use, data quality and turnaround time.

By far, most of the established market for molecular diagnostics lies in the North American region. The market is building in Europe, but is still at relatively an early stage in the rest of the world. Geographically, the US and European markets are the most advanced in terms of adoption of molecular testing and make up the majority of the market.

In the current market for HPV, only about 20% of women over the age of 30 are screened for HPV using DNA-based tests in conjunction with a standard Pap smear, which leaves a lot of room for market growth.

#### Key Reasons to Purchase this Research

- Understand each market in terms of size as well as its future potential.
- Understand which key products are already in the market place for each market segment analyzed.
- Evaluates which segment future opportunities may lie for companies.
- Understand key issues & challenges facing molecular diagnostics makers & their component suppliers thus helping potential entrants review the issues
- Learn about possible products from recent market developments mentioned in the report.

# **Table of Contents**

## Advances in molecular diagnostics

### **Executive summary 12**

Introduction 12 **Trends and drivers 13** Market developments 14 Markets 15 **Chapter 1 Introduction 18 Summary 18 Perspective 19 Perspective 19** An emerging science 19 Understanding the human genome 21 Molecular level analysis 22 Personalized care 22 Individualized response 23 Early-stage diagnosis 25 Infectious disease 26 Viruses 27 Oncology 28 **Diagnostics business opportunity 30** A growing role in diagnostics 30 Companion diagnostics and therapies 31 Diagnostics allowing early detection and treatment 32 Increased efficiency 33 Optimizing drug therapy 33 Significant regulatory concerns 34 Strengthening oversight 34 Improving patient outcomes 36 Optimizing instrumentation and chemistries 38 Advances in sample preparation needed 39 Automation 41

### **Chapter 2 Trends and drivers 48**

Summary 48 Integral to traditional labs 49 Improved assay/test efficiencies 50 Targeting antibiotic resistance 52 Next generation ultrasensitive molecular diagnostics 54 Platform variety 55 PCR 56 Microfluidics 58 Biochips/microarrays 59 Others 60 Challenges and issues 62 Re-emergence of infectious diseases and other threats 64 Establishing accepted regulatory processes 66 Reimbursement 68 Medicare coverage 69

## **Chapter 3 Market developments 7**

#### Summary 72

Extracting microRNAs from tissue 73 Cystic fibrosis genetic screening 74 PET scanning 75 Expanded medicare coverage 76 Ionian Technologies-Roche collaboration 77 Leukemia diagnostic kit cleared 77 New lung cancer test 78 AMD diagnostic 79 Key biomarker gene 80 Point of care instrumentation 81 Genotyping test launch 82 Innovative colon cancer diagnostic 83 Innovative pancreatic cancer diagnostic 84 Brain cancer companion diagnostic 85 Rapid thermocycling 86 Acquisition of AcroMetrix 87 Real-time PCR 87 APiX detection kit 88

Biomarker analysis 88 Genetic dermatology 89 Genome sequencing agreement 90

## Chapter 4 Markets 92

Summary 92 Overview 93 Growth drivers 94 Future opportunities 95 World market forecasts 99 Geographical segmentation 101 Type of testing 103 Blood screening 103 HPV testing 105 Hospital acquired infections 108 HIV/HCV testing 110 Genetic testing 113 Oncology 116 STD testing 118

### **Chapter 5 Corporate profiles 124**

Abbott Molecular 124 Company description 124 AcroMetrix 125 Company description 125 Adnavance Technologies Inc. 126 Company description 126 Affymetrix 127 Company description 127 Asuragen Inc. 128 Company description 128 AutoGenomics Inc. 129 Company description 129 **Beckman Coulter Inc. 130** Company description 130 **Becton Dickinson 131** Company description 131

**Biocartis SA 132** Company description 132 **BioHelix 133** Company description 133 bioMérieux SA 134 Company description 134 **Bio-Rad Laboratories Inc. 135** Company description 135 Celera 136 Company description 136 Cepheid 137 Company description 137 CombiMatrix Corp. 138 Company description 138 Cytocell Ltd. 139 Company description 139 DiagnoCure Inc. 140 Company description 140 Diasorin SpA 141 Company description 141 Dx Assays 142 Company description 142 EliTech Group 143 Company description 143 Enzo Biochem 144 Company description 144 **EraGen Biosciences 145** Company description 145 **Fujirebio Diagnostics Inc. 146** Company description 146 Gen-Probe Inc. 147 Company description 147 Gene Express Inc. 148 Company description 148 **GE Healthcare 149** Company description 149 Genomic Health Inc. 150

Company description 150 **IBT Laboratories 151** Company description 151 Illumina Inc. 152 Company description 152 IntelligentMDx 153 Company description 153 InVivoScribe Technologies Inc. 154 Company description 154 **IRIS International Inc. 155** Company description 155 **Kreatech Diagnostics 156** Company description 156 Luminex Molecular Diagnostics Inc. 157 Company description 157 **Myriad Genetics Inc. 158** Company description 158 Nanosphere Inc. 159 Company description 159 Norgen Biotek 160 Company description 160 **Novartis International AG 161** Company description 161 **OncoVista Inc. 162** Company description 162 Pall Gene Systems 163 Company description 163 Pathwork Diagnostics 164 Company description 164 PrimeraDx 165 Company description 165 **Orion Genomics 166** Company description 166 **Osmetech Molecular Diagnostics 167** Company description 167 Qiagen NV 168 Company description 168

**RedPath Integrated Pathology Inc. 169** Company description 169 **Roche Diagnostics 170** Company description 170 **Rosetta Genomics Ltd. 171** Company description 171 Seegene 172 Company description 172 Siemens Healthcare 173 Company description 173 Singulex 174 Company description 174 viii **Thorne Diagnostics Inc. 175** Company description 175 TrovaGene Inc. 176 Company description 176 Veridex LLC 177 Company description 177 Vita Genomics Inc. 178 Company description 178

## Chapter 6 Appendix 180

Methodology 180 Glossary 181 Endnotes 184 Index 191

# List of Figures

Figure 1.1: Molecular diagnostics: predicting response, early treatment of disease 25
Figure 2.2: Molecular Diagnostics 29
Figure 2.3: Integrating molecular diagnostics with therapeutics 32
Figure 2.4: Changing treatment protocols in clinical practice 42
Figure 3.5: Clinical potential of molecular diagnostics 49
Figure 3.6: Molecular diagnostics: challenges for developers 64
Figure 5.7: World Market for molecular diagnostics by geography, 2010 103
Figure 5.8: World Market for molecular diagnostics by application, 2010 103

Figure 5.9: Molecular diagnostics diagnosing cancer 117

## List of Tables

Table 5.1: Key players in molecular diagnostics 100

Table 5.2: World market for molecular diagnostics, 2009-2015, (\$m) 101

Table 5.3: World Market for molecular diagnostics by geography, 2010, (\$m) 102

Table 5.4: World Market for molecular diagnostics by application, 2010, (\$m) 102

Table 5.5: Molecular diagnostics blood screening market, breakup by competition, (\$m) 105

Table 5.6: Molecular diagnostics HPV testing market, breakup by competition, (\$m) 108

Table 5.7: Molecular diagnostics hospital acquired infections testing market, breakup by competition, (\$m) 109

Table 5.8: Molecular diagnostics HIV/HCV testing market, breakup by competition, (\$m) 112

Table 5.9: Molecular diagnostics genetic testing market, breakup by competition, (\$m) 116

Table 5.10: Molecular diagnostics oncology testing market, breakup by competition, (\$m) 118

Table 5.11: Molecular diagnostics STD testing market, breakup by company, (\$m) 122