

# 2014 Opportunities in the U.S. Clinical Chemistry and Immunodiagnostic Market

## Table of Contents

### **I. Introduction**

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

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

### **IV. 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

### **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

### **VI. 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

## Table of Contents (Continued)

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

### 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

## Table of Contents (Continued)

12. Phenytoin
13. Quinidine
14. Sirolimus
15. Tacrolimus
16. Theophylline
17. Topiramate
18. Valproic Acid

### C. Endocrine Function Tests

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

### 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

## **Table of Contents (Continued)**

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

### **G. Instrumentation Review: Operating characteristics and features of high-, medium-, and low-volume/POC analyzers**

### **H. Major In Vitro Diagnostic Technologies And Their Potential Applications**

1. Monoclonal and Polyclonal Antibodies
2. Immunoassays

## **Table of Contents (Continued)**

- a. Technological Principle
- b. Chemiluminescence
- c. Enzyme Immunoassays (EIA)
  - ° Overview
  - ° ELISA
  - ° EMIT
  - ° Electrochemical
- d. Radioimmunoassays (RIA)
- e. Immunoprecipitation
- f. Affinity Chromatography
- 3. Tandem Mass Spec
- 4. IT and Automation
- 5. Dry Chemistry
- 6. Biosensors

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

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

### **XIII. Competitive Assessments**

- Abbott Laboratories
- AdnaGen
- Agilent Technologies
- Beckman Coulter/Danaher
- Biomedical Diagnostics
- BioMerieux
- Bio-Rad
- DiaSorin
- Eiken
- Fujirebio/Innogenetics
- Instrumentation Laboratory
- Kyowa Medex
- Matritech/Alere
- Ortho-Clinical Diagnostics
- Quest Diagnostics

## **Table of Contents (Continued)**

- 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 Immunological Testing

Executive Summary Table: U.S.A., Clinical  
Chemistry and Immunoassay Test Volume  
and Diagnostics Sales Forecast By Test Category

U.S.A., Laboratories Performing Chemistry  
and Immunoassay Testing By Market Segment

U.S.A., Hospital Laboratories Performing  
Chemistry and Immunoassay Tests By Bed Size

U.S.A., Commercial/Private Laboratories  
Performing Chemistry and Immunoassay Tests  
By Annual Test Volume

U.S.A., Total Chemistry and Immunoassay  
Specimen Volume Forecast

U.S.A., All Market Segments, Specimen Volume  
Forecast By Test Category

U.S.A., Total Clinical Chemistry and Immunoassay  
Test Volume Forecast By Test Category

U.S.A., Routine Chemistry Test Volume  
Forecast By Market Segment

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

## **List of Tables (continued)**

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

## **List of Tables (continued)**

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

## **List of Tables (continued)**

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

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

## **List of Tables (continued)**

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

U.S.A., Drugs of Abuse Reagent Market  
Forecast By Market Segment

U.S.A., Tumor Markers and Special Chemistry  
Reagent Market Forecast By Market Segment

U.S.A., Endocrine Function Reagent Market  
Forecast By Market Segment

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

## **List of Tables (continued)**

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

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

U.S.A., Physician Offices/Group Practices, Drugs of Abuse Reagent Market Forecast by Assay

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

## **List of Tables (continued)**

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,  
Immunoprotein Reagent Market Forecast

U.S.A., Physician Offices/Group Practices,  
Immunoprotein Reagent Market Forecast  
by Assay

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 Market Shares

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