

**2013 Analysis of the European HIV/AIDS Diagnostics Market:
Hospitals, Blood Banks, Public Health Labs,
Commercial Labs--Supplier Shares and Sales Forecasts
For Immunodiagnostic and NAT Procedures**

TABLE OF CONTENTS

I. Introduction

II. AIDS/HIV Worldwide Market and Technology Overview

- A. Background
- B. Diagnostic Tests: HIV-1/2, HIV Ag, NAT, Western Blot
- C. Vaccines and Drugs
- D. Instrumentation Review and Market Needs
- E. Emerging Diagnostic Technologies

**III. France: Market Size, Growth and Major Suppliers'
Sales and Market Shares**

**IV. Germany: Market Size, Growth and Major Suppliers'
Sales and Market Shares**

**V. Italy: Market Size, Growth and Major Suppliers'
Sales and Market Shares**

**VI. Spain: Market Size, Growth and Major Suppliers'
Sales and Market Shares**

**VII. UK: Market Size, Growth and Major Suppliers'
Sales and Market Shares**

VIII. 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

IX. 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

X. Competitive Assessments

- Abbott
- Affymetrix
- Beckman Coulter/Danaher
- Becton Dickinson
- bioMerieux
- Bio-Rad
- Cepheid
- Diamedix
- DiaSorin
- Eiken Chemical
- Enzo Biochem
- Fujirebio/Innogenetics
- Hologic/Gen-Probe
- ID Biomedical/GSK
- Kreatech
- Life Technology
- Lonza
- Nanogen/Elitech
- Novartis Diagnostics
- Ortho-Clinical Diagnostics
- Qiagen
- Roche
- Scienion
- Sequenom
- SeraCare
- Siemens
- Takara Bio
- Thermo Fisher
- Wallac/PE
- Wako

LIST OF TABLES

Major Companies Developing or Marketing AIDS Tests

France: HIV or HIV-1/2 Test Volume and Sales Forecasts
By Market Segment

France: HIV Ag Test Volume and Sales Forecasts
By Market Segment

France: HIV NAT Blood Screening Test Volume and Diagnostics Sales

France: Western Blot/Other Confirmatory Tests Volume
and Sales Forecasts by Market Segment

France: AIDS Diagnostics Market by Major Supplier

France: HIV Blood Screening NAT Sales and Market Shares of Major Suppliers

Germany: HIV or HIV-1/2 Test Volume and Sales Forecasts
By Market Segment

Germany: HIV Ag Test Volume and Sales Forecasts
By Market Segment

Germany: HIV NAT Blood Screening Test Volume and Diagnostics Sales

Germany: Western Blot/Other Confirmatory Tests Volume
And Sales Forecasts by Market Segment

Germany: AIDS Diagnostics Market by Major Supplier

Germany: HIV Blood Screening NAT Sales and Market Shares
Of Major Suppliers

Italy: HIV or HIV-1/2 Test Volume and Sales Forecasts
By Market Segment

Italy: HIV Ag Test Volume and Sales Forecasts
By Market Segment

Italy: HIV NAT Blood Screening Test Volume and Diagnostics Sales

Italy: Western Blot/Other Confirmatory Tests Volume
And Sales Forecasts by Market Segment

Italy: AIDS Diagnostics Market by Major Supplier

Italy: HIV Blood Screening NAT Sales and Market Shares of Major Suppliers

Spain: HIV or HIV -1/2 Test Volume and Sales Forecasts
By Market Segment

Spain: HIV Ag Test Volume and Sales Forecasts
By Market Segment

Spain: HIV NAT Blood Screening Test Volume and Diagnostics Sales

Spain: Western Blot/Other Confirmatory Tests Volume
And Sales Forecasts by Market Segment

Spain: AIDS Diagnostics Market by Major Supplier

Spain: HIV Blood Screening NAT Sales and Market Shares of Major Suppliers

UK: HIV or HIV -1/2 Test Volume and Sales Forecasts
By Market Segment

UK: HIV Ag Test Volume and Sales Forecasts
By Market Segment

UK: HIV NAT Blood Screening Test Volume and Diagnostics Sales

UK: Western Blot/Other Confirmatory Tests Volume
And Sales Forecasts by Market Segment

UK: AIDS Diagnostics Market by Major Supplier

UK: HIV Blood Screening NAT Sales and Market Shares of Major Suppliers