

IMMUNOASSAY MARKET

[**Technology** (Enzyme, Fluorescent, Chemiluminescence, Radioimmunoassay), **Analyzers & Reagents, Application** (Infectious Diseases, Cancer, Endocrinology, Cardiology), **End-Users** (Hospitals, Laboratory, Academics)]

– **Global Forecast to 2018**



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1 INTRODUCTION

1.1 MARKETS COVERED

This global immunoassays market report mainly covers four segments, namely, by technology, by applications, by products (analyzers and reagents), and end-users. These segments are further segmented as follows:

Global Immunoassays Market, by Technology:

- Enzyme Immunoassays (EIA)
- Fluorescent Immunoassays
- Chemiluminescence Immunoassays (CLIA)
- Radioimmunoassays (RIA)
- Others (Nephelometric Immunoassays, Turbidimetric Immunoassays, and Counting Immunoassays (CIA))

Global Immunoassays Market, by Applications:

- Oncology
- Infectious Disease
- Cardiology
- Bone and Mineral
- Endocrinology
- Autoimmunity
- Toxicology
- Hematology (Anemia)
- Neonatal Screening
- Others

Global Immunoassays Markets, by Products:

- Analyzers
 - High Throughput
 - Medium Throughput
 - Low Throughput
- Reagents

Global Immunoassays Market, by End-users:

- Hospitals (Private and Public)
- Laboratories (Private and Public)
- Academics
- Pharmaceutical Industry, CROs, and Biotechs
- Others

Global Immunoassays Market, by Geography:

- Americas
 - U.S.
 - Canada
 - Brazil
 - Mexico
 - RoA (Rest of Americas)
- Europe
 - Germany
 - France
 - U.K.
 - Spain
 - Italy
 - RoE (Rest of Europe)

- Asia-Pacific
 - Japan
 - China
 - India
 - South Korea
 - RoAP (Rest of Asia-Pacific)
- RoW (Rest of World) (Middle East and Africa)

Each section of the report offers market data for various market segments and geographies. It also provides market trends with respect to drivers, restraints, and opportunities. The report also covers the key growth strategies of the players under the competitive landscape section.

1.2 STAKEHOLDERS

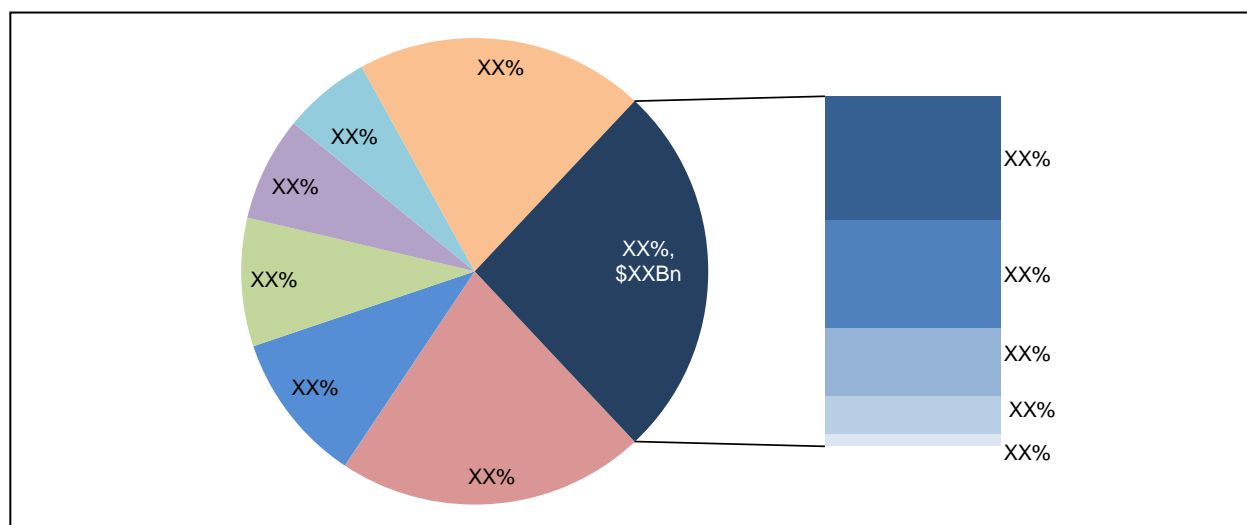
- Immunoassay manufacturers
- In vitro diagnostic (IVD) products manufacturers
- Immunoassay distributors and wholesalers
- OEM (Original Equipment Manufacturers)/contract manufacturers
- Diagnostic associations
- Clinical laboratories and hospitals
- Various research and consulting firms
- Research institutes
- Contract research organizations (CROs)/Contract manufacturing organizations (CMOs)
- Pharmaceutical and biopharmaceutical players

2 PREMIUM INSIGHTS

2.1 IMMUNOASSAY MARKET VS OTHER IVD MARKET SEGMENTS

FIGURE 1

COMPARISON OF IMMUNOASSAY & OTHER IVD SEGMENTS (2013)

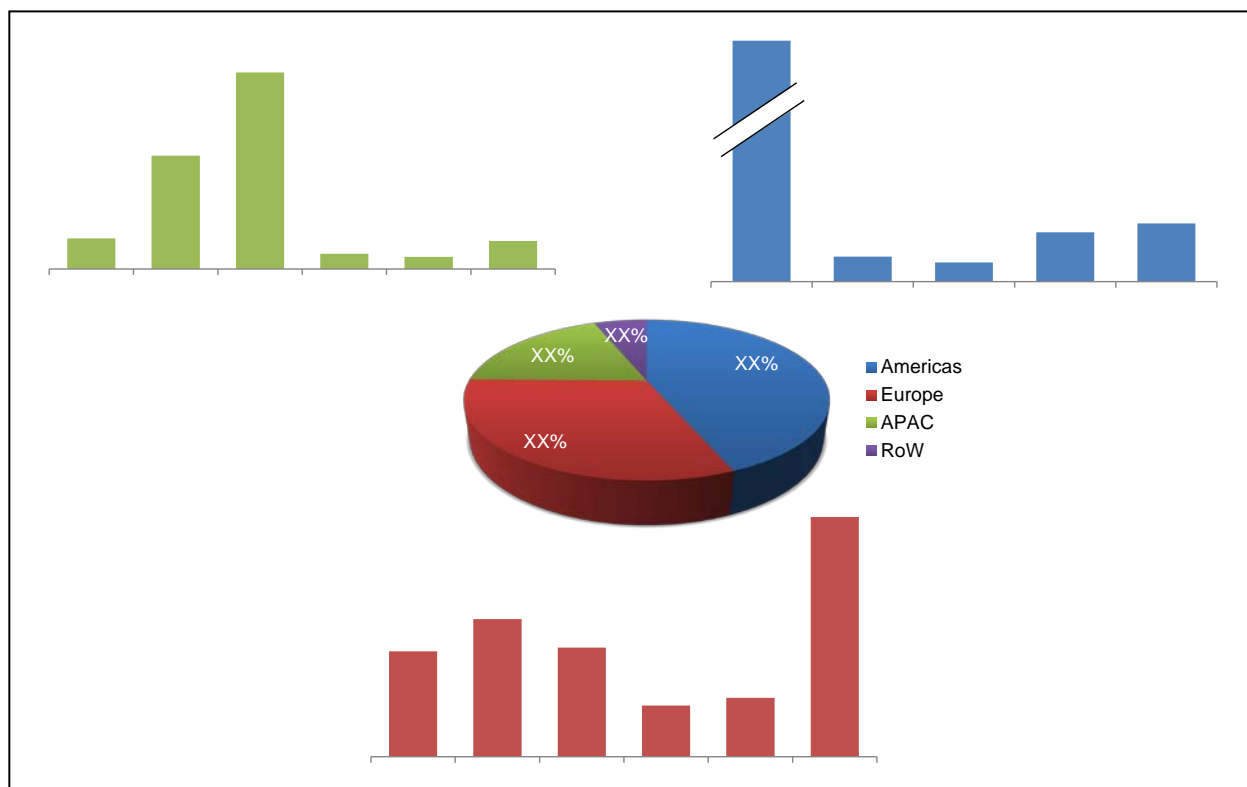


Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

2.2 GEOGRAPHIC ANALYSIS, BY COUNTRY

FIGURE 2

IMMUNOASSAY MARKET: GEOGRAPHIC ANALYSIS, 2013 (\$MILLION)



Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

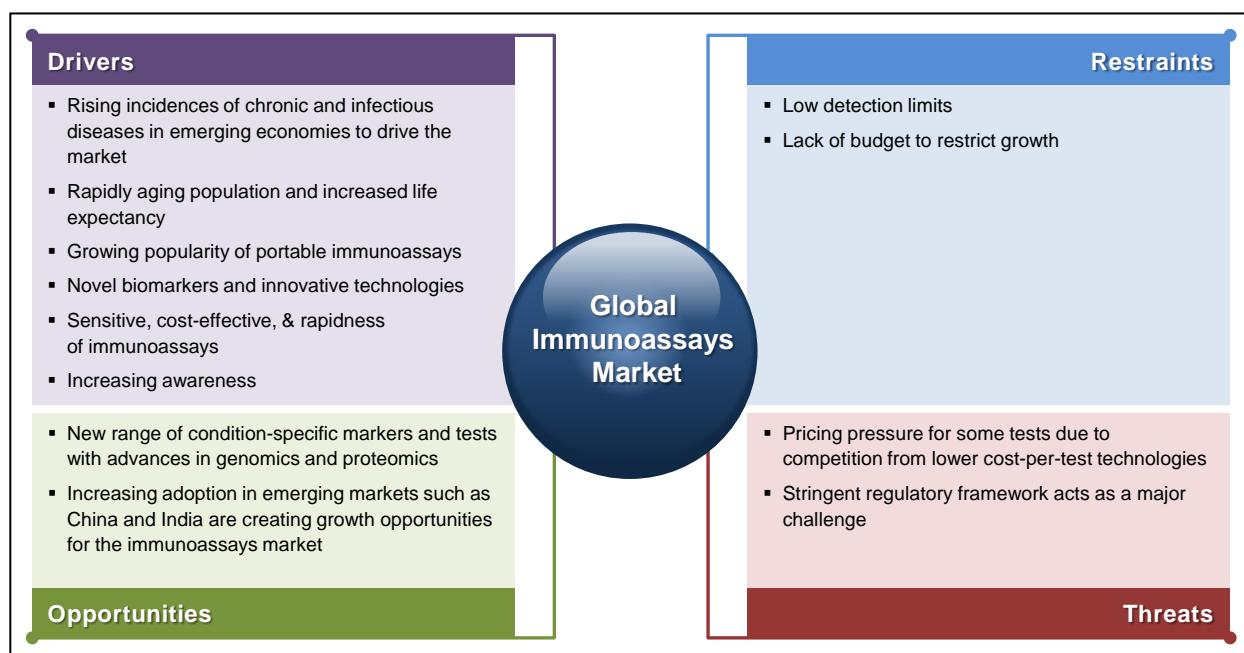
3 INDUSTRY ANALYSIS & MARKET OVERVIEW

3.1 MARKET DYNAMICS

The major factors influencing the immunoassays market are increasing chronic diseases, increasing geriatric population, advancements in technology, the rise in the demand of portable point-of-care testing devices, and increasing healthcare spending from emerging countries.

FIGURE 3

IMMUNOASSAYS MARKET DYNAMICS

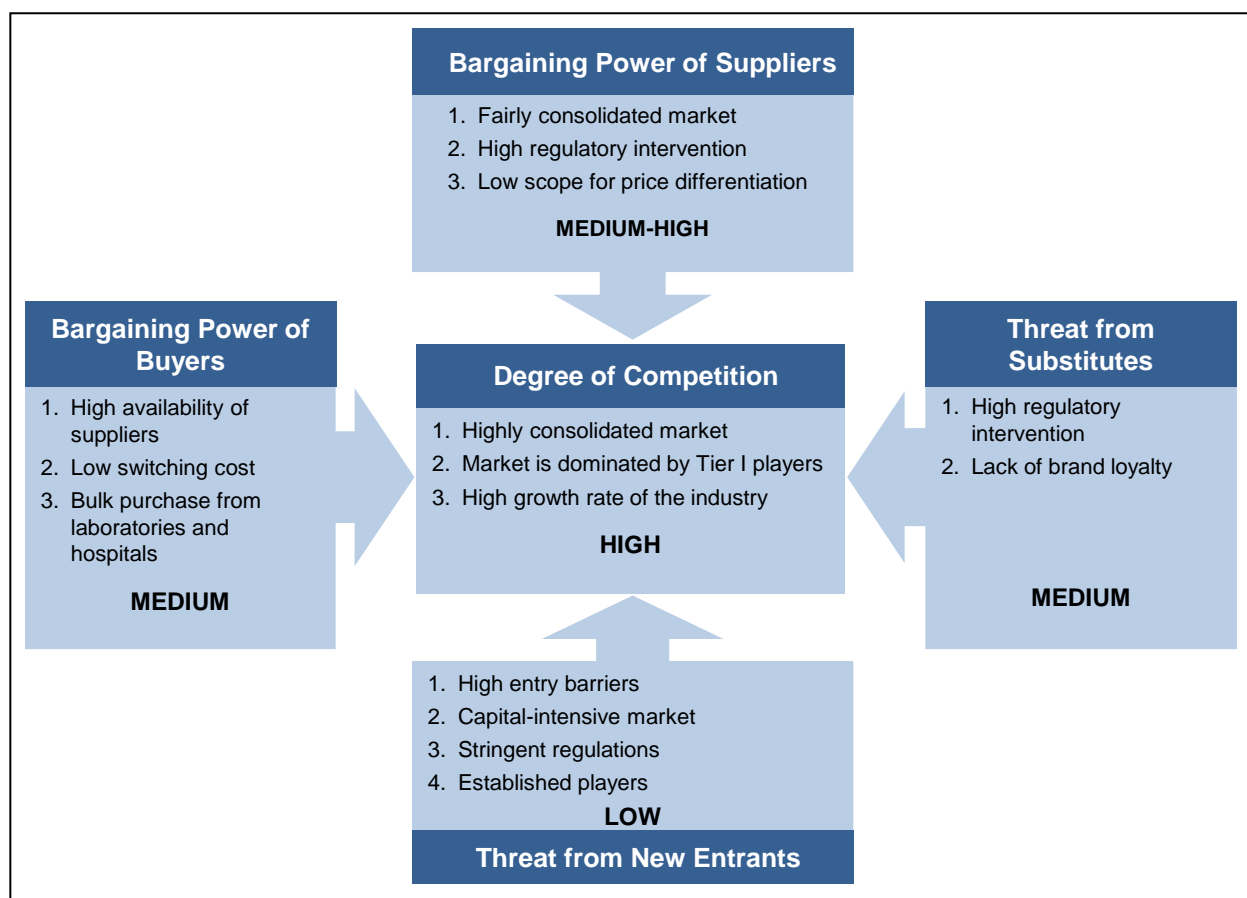


Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

3.2 PORTER'S ANALYSIS

FIGURE 4

PORTER'S FIVE FORCES ANALYSIS: IMMUNOASSAYS MARKET



Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

4 IMMUNOASSAYS MARKET, BY TECHNOLOGY

4.1 INTRODUCTION

TABLE 1

**GLOBAL IMMUNOASSAYS MARKET, BY TECHNOLOGY,
2011 – 2018 (\$MILLION)**

Technology	2011	2012	2013	2014	2015	2016	2017	2018	CAGR% (2013-2018)
Enzyme Immunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Chemiluminescence Immunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Radioimmunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Fluorescent Immunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX	XX	XX

Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

The enzyme immunoassays segment accounted for the largest share of the global immunoassays market in 2012. This segment is expected to reach \$XX million by 2018, at a CAGR of XX% from 2013 to 2018. This large share of enzyme immunoassays is attributed to their long-term market presence, high sensitivity in infectious/viral disease testing, and due to the huge demand from developing countries as they are manually operated and hence are available at lower costs than chemiluminescence immunoassays. However, the chemiluminescence immunoassays market will see the highest growth (CAGR of XX%) in the

next five years as this market comprises of automated systems that offer the highest sensitivity.

5 IMMUNOASSAYS MARKET, BY PRODUCTS (ANALYZERS & REAGENTS)

5.1 INTRODUCTION

Immunoassay tests are based on various technologies that leverage platforms like instruments (analyzers) and reagents. On the basis of product type, the immunoassays market is classified into analyzers and reagents.

5.1.1 REAGENTS MARKET TO GROW WITH INCREASE IN TEST VOLUMES

The reagents segment accounted for the largest share of XX% of the immunoassays market in 2012. The accessibility of a wide range of reagents and the need for reliable, specific, and faster detection of chronic diseases at early stages are factors that are expected to drive the immunoassay reagents market.

Due to the economic slowdown and the Eurozone crisis, the economic situation worldwide is grim. Hence, it is predicted that analyzers and equipment buying will be delayed, at least for two years. However, automation and advancements in analyzers with high-throughput capacities are the major factors responsible for the growth of this market.

TABLE 2

**GLOBAL IMMUNOASSAYS MARKET, BY PRODUCT,
2011 – 2018 (\$MILLION)**

Product	2011	2012	2013	2014	2015	2016	2017	2018	CAGR% (2013-2018)
Reagents	XX	XX	XX	XX	XX	XX	XX	XX	XX
Analyzers	XX	XX	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX	XX	XX

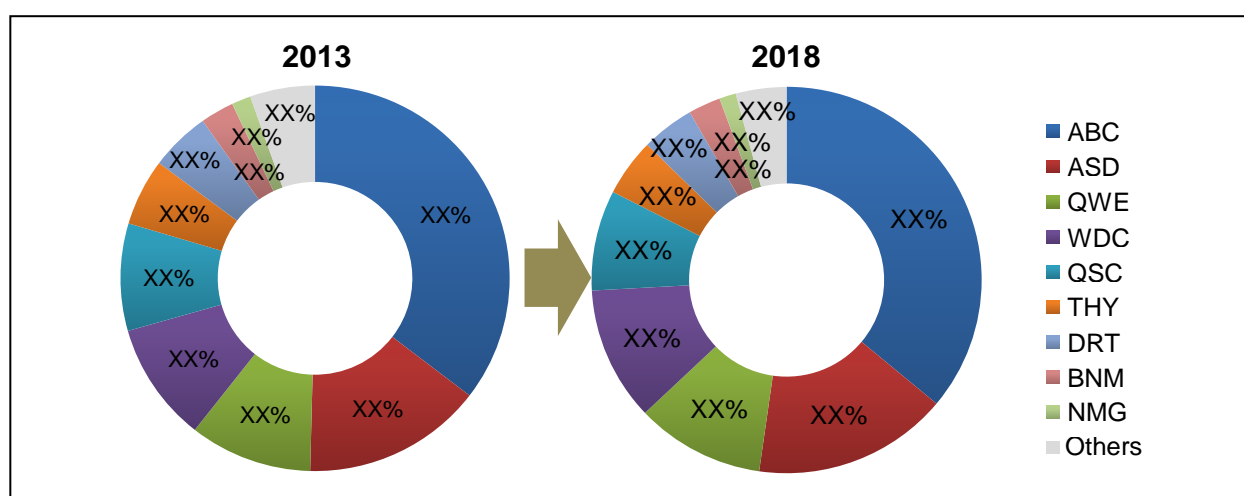
Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

6 IMMUNOASSAY MARKET, BY APPLICATION

6.1 INTRODUCTION

FIGURE 5

GLOBAL IMMUNOASSAYS MARKET, BY APPLICATION, 2013 – 2018



Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

The market share of applications such as infectious diseases, oncology, and endocrinology is expected to increase to XX%, XX%, and XX% in 2018 from XX%, XX%, and XX% in 2013, respectively. This is attributed to the increasing prevalence of diseases in these segments along with the continuous product innovations and launches.

6.2 TOXICOLOGY

Toxicology includes the diagnosis of drug abuse and measurement of therapeutic drug levels in a patient. Drug testing provides vital information for clinical decision making. As of 2012, the toxicology application accounted for a share of XX% of the global immunoassays market.

6.2.1 INCREASING DRUG-ABUSE CASES TO BOOST IMMUNOASSAY TOXICOLOGY MARKET

The key factors driving the growth of this segment include the rise in the development of drug-dependent diagnostics and treatments, increasing need for drug content screening, and the large number of illicit drug users across the world. According to the National Survey on Drug Use and Health report, in 2011, XX million Americans aged 12 or above were illicit drug users. This represents XX% of the total population aged 12 or above.

The toxicology segment is expected to grow at a CAGR of XX% from 2013 to 2018 to reach \$XX million by 2018. Roche Diagnostics Limited (Switzerland), Siemens Healthcare (Germany), Danaher Corporation (U.S.), Alere, Inc. (U.S.), and Ortho Clinical Diagnostics, Inc. (U.S.) are the key players involved in the manufacturing and marketing of drug testing devices, consumables, assays, and reagents.

TABLE 3

**TOXICOLOGY IMMUNOASSAYS MARKET, BY GEOGRAPHY,
2011 – 2018 (\$MILLION)**

Region	2011	2012	2013	2014	2015	2016	2017	2018	CAGR% (2013-2018)
Americas	XX	XX	XX	XX	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX	XX	XX	XX	XX
Asia-Pacific	XX	XX	XX	XX	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX	XX	XX

Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

The Americas commanded the largest share of the toxicology immunoassays market, at an estimated \$XX million in 2012. This segment is expected to reach \$XX million by 2018, at a CAGR of XX% from 2013 to 2018.

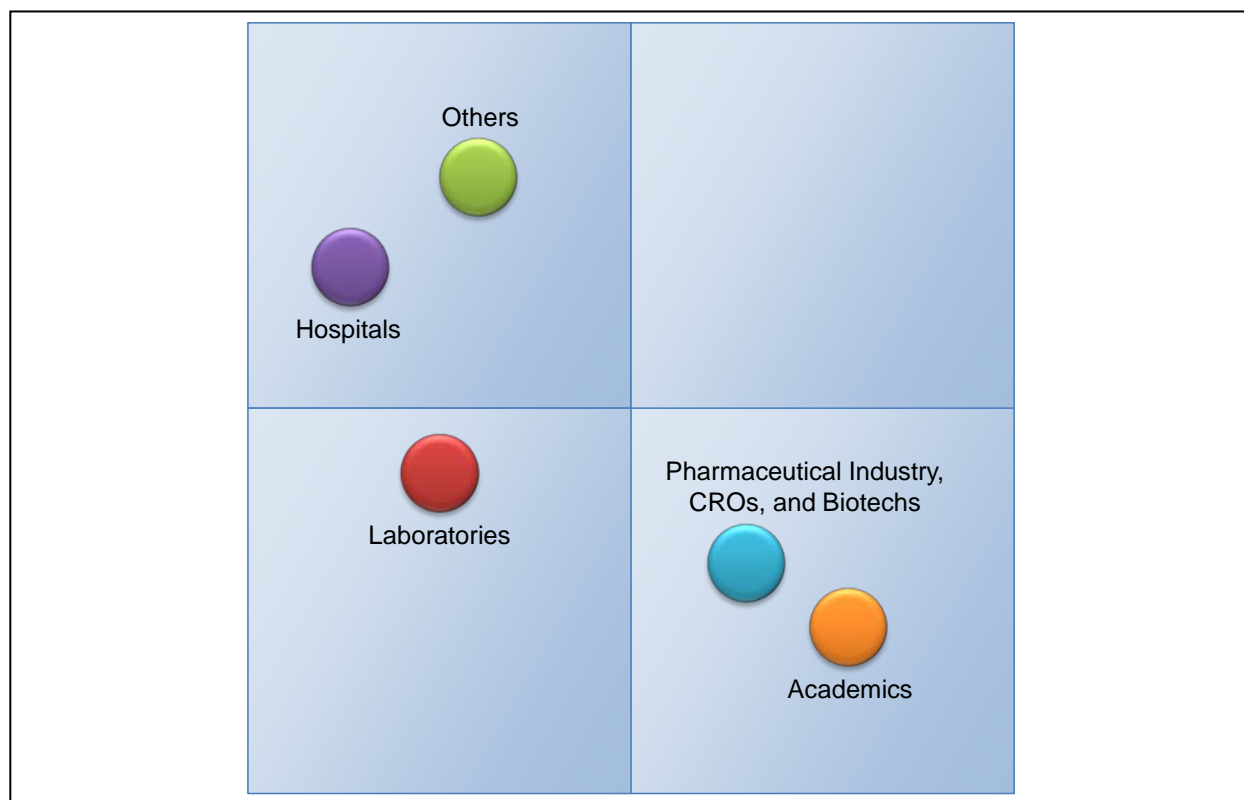
7 GLOBAL IMMUNOASSAYS MARKET, BY END-USERS

7.1 INTRODUCTION

Immunoassay tests are performed in a variety of settings such as hospital laboratories, independent reference laboratories, academic centers, blood banks, clinical research organizations (CROs), biotechnology companies, physicians' offices, and at home.

FIGURE 6

GLOBAL IMMUNOASSAYS MARKET, END-USER POSITIONING



Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

The emerging lateral flow immunoassay products (point-of-care testing) are used for various conditions like diabetes, pregnancy, and cardiac activity and hence will drive the growth of the other end-users market in the near future.

8 GEOGRAPHIC ANALYSIS

8.1 BRAZIL

The immunoassays market in Brazil was valued at \$XX million in 2012 and is expected to reach \$XX million in 2018, at a high CAGR of XX% from 2013 to 2018.

TABLE 4

**BRAZIL: IMMUNOASSAYS MARKET, BY TECHNOLOGY,
2011 – 2018 (\$MILLION)**

Technology	2011	2012	2013	2014	2015	2016	2017	2018	CAGR% (2013- 2018)
Enzyme Immunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Chemiluminescence Immunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Radioimmunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Fluorescent Immunoassays	XX	XX	XX	XX	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX	XX	XX	XX	XX

Source: Annual Reports, SEC Filings, Investor Presentations, In Vitro Diagnostics Associations & Journals, WHO, European Diagnostic Manufacturers Association, American Association for Clinical Chemistry, Expert Interviews, and MarketsandMarkets Analysis

Enzyme immunoassays commanded the largest share of the Brazil immunoassays market, at an estimated \$XX million in 2012. This segment is expected to reach \$XX million by 2018 at a CAGR of XX% from 2013 to 2018.

9 COMPETITIVE LANDSCAPE

9.1 INTRODUCTION

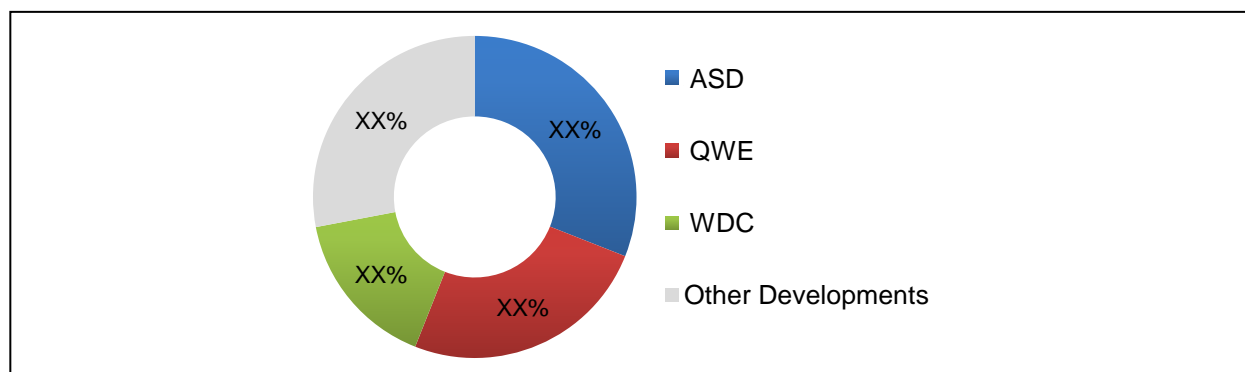
In the competitive landscape, the report studies the growth strategies adopted by the companies between 2010 and 2013. Players in this market have adopted various strategies to expand their global footprint and to increase their market shares. The key growth strategies adopted by most companies in the global immunoassays market were new product launches, agreements, collaborations, mergers, acquisitions, and other developments.

9.1.1 AGREEMENTS, PARTNERSHIPS & JVS IS THE KEY GROWTH STRATEGY ADOPTED BY PLAYERS

Extensive research in this market brought to light that the key strategy followed by a majority of the industry players was agreements, partnerships, collaborations, and joint ventures to enhance their product offerings, to increase their market shares, and to consolidate their market presence. This strategy accounted for XX% share of the total number of key growth strategies between 2010 and 2013. The key participants in this section are Beckman Coulter, Inc. (U.S.), IBL International (Germany), and Thermo Fisher Scientific Inc. (U.S.).

FIGURE 7

KEY GROWTH STRATEGY, 2010 – 2013



Source: Expert Interviews, Press Releases, and MarketsandMarkets Analysis

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