

INTRODUCTION	XXI
STUDY GOALS AND OBJECTIVES.....	XXI
REASONS FOR DOING THIS STUDY	XXI
SCOPE OF REPORT	XXII
INTENDED AUDIENCE.....	XXII
METHODOLOGY	XXIII
INFORMATION SOURCES.....	XXIII
ABOUT THE AUTHOR.....	XXIII
RELATED BCC RESEARCH REPORTS.....	XXIII
BCC ON-LINE SERVICES.....	XXIV
DISCLAIMER	XXIV
 SUMMARY.....	 XXV
<i>SUMMARY TABLE REVENUE FORECAST FOR GLOBAL BIOMARKERS MARKET BY SEGMENTS, THROUGH 2012 (\$ MILLIONS)</i>	 XXVII
<i>SUMMARY FIGURE REVENUE FORECAST PROJECTIONS FOR GLOBAL BIOMARKER MARKETS BY SEGMENTS, THROUGH 2012 (\$ MILLIONS)</i>	 XXVIII
 OVERVIEW	 1
DEFINITION OF BIOMARKERS.....	1
TAXONOMY OF BIOMARKERS.....	2
<i>TABLE 1 EXAMPLES OF EFFICACY EXPLORATORY BIOMARKERS</i>	2
PREDICTIVE BIOMARKERS.....	3
PROGNOSTIC BIOMARKERS	3
EFFICACY BIOMARKERS	3
TRANSLATIONAL BIOMARKERS	3
TARGET BIOMARKERS.....	3
SURROGATE BIOMARKERS.....	3
TOXICITY BIOMARKERS	3
KNOWN VALID BIOMARKERS	4
<i>TABLE 2 KNOWN VALID SAFETY BIOMARKERS</i>	4
<i>TABLE 3 KNOWN VALID EFFICACY BIOMARKERS</i>	4
PROBABLE VALID BIOMARKER	4
<i>TABLE 4 EFFICACY BIOMARKERS IN THE PROBABLY VALID MARKER CATEGORY</i>	 5
<i>TABLE 5 CLASSIFICATION OF BIOMARKERS BASED ON THEIR UTILITY</i>	 5
APPLICATIONS OF BIOMARKERS.....	5
<i>TABLE 6 USES OF BIOMARKERS</i>	6
BIOMARKER VALIDATION	7
BIOMARKER VALIDATION (CONTINUED).....	8
BIOMARKER VALIDATION (CONTINUED).....	9

MARKETS BY BIOMARKER DISCOVERY FOR LIFESCIENCES

RESEARCH	10
BIOMARKER DISCOVERY TECHNOLOGY	10
<i>TABLE 7 TECHNOLOGIES FOR BIOMARKER DISCOVERY</i>	10
<i>TABLE 7 (CONTINUED)</i>	11
<i>FIGURE 1 BIOMARKER DISCOVERY PROCESS</i>	12
OVERVIEW OF ENABLING TECHNOLOGIES	13
Microarrays.....	13
Real Time Reverse Transcriptase- PCR (RT-PCR)	14
Single Nucleotide Polymorphisms (SNP)	15
Epigenomics Technology	15
Protein Separation Techniques.....	16
2D Gel Electrophoresis (2DGE).....	16
<i>TABLE 8 COMMON LIMITATIONS OF 2DGE</i>	17
Differential Gel Electrophoresis (DIGE).....	17
Liquid Chromatography (LC).....	17
Protein Identification Technologies	18
SELDI-TOF	18
Tissue Microarrays	18
Isotope Affinity Tagged Techniques.....	19
BIOMARKER DISCOVERY TECHNOLOGY RESEARCH -INDUSTRY	
STRUCTURE.....	20
BIOMARKER DISCOVERY TECHNOLOGY...(CONTINUED)	21
BIOMARKER DISCOVERY TECHNOLOGY...(CONTINUED)	22
NOTEWORTHY MERGERS AND ACQUISITIONS IN THE	
BIOMARKER.....	23
Noteworthy Mergers and Acquisitions...(Continued)	24
<i>TABLE 9 BIOMARKER DISCOVERY TECHNOLOGY PARTICIPANTS</i>	
<i>(GENOMICS/PROTEOMICS/BIOINFORMATICS)</i>	25
<i>TABLE 9 (CONTINUED)</i>	26
<i>TABLE 9 (CONTINUED)</i>	27
<i>TABLE 9 (CONTINUED)</i>	28
<i>TABLE 9 (CONTINUED)</i>	29
<i>TABLE 9 (CONTINUED)</i>	30
<i>TABLE 9 (CONTINUED)</i>	31
<i>TABLE 10 NEW TECHNOLOGY PRODUCT LAUNCHES IN THE</i>	
<i>BIOMARKER INDUSTRY</i>	32
<i>TABLE 10 (CONTINUED)</i>	33
<i>TABLE 10 (CONTINUED)</i>	34
<i>TABLE 11 STRATEGIC ALLIANCE / RECENT INDUSTRY</i>	
<i>ACTIVITIES IN BIOMARKER DISCOVERY</i>	35
<i>TABLE 11 (CONTINUED)</i>	36
<i>TABLE 11 (CONTINUED)</i>	37
<i>TABLE 11 (CONTINUED)</i>	38

<i>TABLE 11 (CONTINUED)</i>	39
SWOT ANALYSIS.....	39
Technology Vendors with their Proprietary Platforms for Biomarker Discovery are Likely to Gain the Competitive Edge	39
Biomarkers Hold a Promising Potential along the Downstream Continuum of Drug Development.....	39
Companies Embracing the FDA’s CPI Coupled with Constant Interaction with the FDA Can Strengthen Their Biomarker Pipeline	40
Strong IP Portfolio to Maximize Revenues.....	40
Biomarker Discovery Companies are Aiming to Carve a Niche in Many Therapeutic Areas.....	41
Biomarkers : A Capital Intensive Market for the Near- Term.....	41
Diagnostics and Biomarkers	41
Discovery Out-Steps Biomarker Validation	42
Regulatory Framework.....	42
High Costs Associated with these Novel Technologies Might Deter Technology Adoption.....	43
Strategic Alliances and Technology Licensing Nurture the Growing Trend of Biomarkers	43
Growing Interest in Biomarker Panel Pursuits: “The More the Merrier”	43
Theranostics- The New Confluence of Pharmaceutical and Diagnostics Products.....	44
Personalized Medicine: The Ultimate Milestone Challenge for both Pharmaceutical and Diagnostics Companies	44
BIOMARKER DISCOVERY TECHNOLOGY SPOTLIGHT.....	45
Metabolomics (Continued).....	46
<i>TABLE 12 MAJOR PARTICIPANTS IN THE METABOLOMICS TECHNOLOGY SECTOR FOR BIOMARKER DISCOVERY</i>	47
<i>TABLE 12 (CONTINUED)</i>	48
Determining Efficacy	49
Early Detection of Disease	49
Drug Delivery	49
Pharmacokinetics	50
Surrogate End-Points	50
Molecular Imaging for Cancer Detection.....	51
Molecular Imaging ... (Continued).....	52
Molecular Imaging ... (Continued).....	53
<i>TABLE 13 PROMISING IMAGING BIOMARKERS</i>	54
Imaging Biomarker Challenges	54

Standardization of Imaging Data: A Key Challenge	
Hindering Technology Adoption	54
Diverse Objectives among Stakeholders might Pose	
Difficulties in Data Sharing	54
Variability in Platforms across Different Clinical	
Sites Poses a Major Challenge	54
REVENUE FORECASTS BY BIOMARKER DISCOVERY	
TECHNOLOGY	55
TABLE 14 GLOBAL BIOMARKER DISCOVERY, REVENUE FORECAST	
BY TECHNOLOGY SEGMENTS, THROUGH 2012 (\$ MILLIONS)	56
FIGURE 2 GLOBAL BIOMARKER DISCOVERY, REVENUE	
FORECAST BY TECHNOLOGY SEGMENT, 2005-2012 (\$ MILLIONS).....	56
TABLE 15 GLOBAL BIOMARKER DISCOVERY MARKET, REVENUE	
SPLIT BY TECHNOLOGY SEGMENT, 2005-2012 (%)	57
FIGURE 3 GLOBAL BIOMARKER DISCOVERY, REVENUE SPLIT BY	
TECHNOLOGY TYPE, 2007 (%).....	57
FIGURE 4 GLOBAL BIOMARKER DISCOVERY, REVENUE SPLIT BY	
TECHNOLOGY TYPE, 2012 (%).....	58
TABLE 16 GLOBAL BIOMARKER DISCOVERY TECHNOLOGY	
MARKET BY REGION, THROUGH 2012: REVENUE FORECAST,	
THROUGH 2012 (\$ MILLIONS).....	59
FIGURE 5 GLOBAL BIOMARKER DISCOVERY TECHNOLOGY	
MARKET, REVENUE PROJECTIONS BY DIFFERENT	
GEOGRAPHICAL SEGMENTS, 2005-2012 (\$ MILLIONS	59
REVENUE FORECASTS BY ...(CONTINUED)	60
Market Trends and Revenue Forecast Projections	61
TABLE 17 GLOBAL GENOMICS BIOMARKER TECHNOLOGY	
MARKET BY REGION, THROUGH 2012 (\$ MILLIONS)	61
FIGURE 6 GLOBAL GENOMICS BIOMARKER TECHNOLOGY	
MARKET BY REGION, 2005-2012 (\$ MILLIONS).....	61
TABLE 18 GLOBAL GENOMICS BIOMARKER DISCOVERY	
TECHNOLOGY MARKETS, PRODUCTS AND SERVICES,	
THROUGH 2012 (\$ MILLIONS).....	62
FIGURE 7 GLOBAL GENOMICS BIOMARKER DISCOVERY	
TECHNOLOGY MARKETS, PRODUCTS AND SERVICES, 2005-2012	
(\$ MILLIONS).....	62
Market Trends and ...(Continued)	63
Market Trends and ...(Continued)	64
Market Trends and ...(Continued)	65
Observations:	65
Future Growth Potential.....	66
Revenue Forecasts and Trends	66

<i>TABLE 19 GLOBAL PROTEIN BIOMARKER DISCOVERY TECHNOLOGY MARKET: BY REGION, THROUGH 2012 (\$ MILLIONS)</i>	67
<i>FIGURE 8 GLOBAL PROTEIN BIOMARKER DISCOVERY TECHNOLOGY MARKET: BY REGION, 2005-2012 (\$ MILLIONS)</i>	67
Revenue Forecasts ... (Continued).....	68
Revenue Forecasts ... (Continued).....	69
<i>TABLE 20 GLOBAL METABOLOMIC TECHNOLOGIES FOR BIOMARKER DISCOVERY BY REGION, THROUGH 2012 (\$ MILLIONS)</i>	70
<i>FIGURE 9 GLOBAL METABOLOMIC TECHNOLOGIES FOR BIOMARKER DISCOVERY BY REGION, 2005-2012 (\$ MILLIONS)</i>	70
Revenue Forecast Projections	70
Revenue Forecast Projections (Continued).....	71
Revenue Forecast.....	72
<i>TABLE 21 GLOBAL BIOINFORMATICS MARKET FOR BIOMARKER DISCOVERY APPLCATIONS BY REGION, THROUGH 2012 (\$ MILLIONS)</i>	72
<i>FIGURE 10 GLOBAL BIOINFORMATICS MARKET FOR BIOMARKER DISCOVERY APPLCATIONS BY REGION, THROUGH 2012 (\$ MILLIONS)</i>	73
REVENUE PROJECTIONS FOR GLOBAL BIOMARKER DISCOVERY, BY THERAPEUTIC RESEARCH AREA	74
<i>TABLE 22 GLOBAL FORECAST PROJECTIONS FOR BIOMARKER RESEARCH MARKETS BY THERAPEUTIC AREA, THROUGH 2012 (\$ MILLIONS)</i>	75
<i>FIGURE 11 GLOBAL FORECAST PROJECTIONS FOR BIOMARKER RESEARCH MARKETS BY THERAPEUTIC AREA, 2005-2012 (\$ MILLIONS)</i>	75
<i>FIGURE 12 PERCENT CONTRIBUTION TO BIOMARKER DISCOVERY, BY THERAPEUTIC AREA OF RESEARCH, 2007 (%)</i>	76
<i>FIGURE 13 PERCENT CONTRIBUTION TO BIOMARKER DISCOVERY, BY THERAPEUTIC AREA OF RESEARCH, 2012 (%)</i>	76
<i>FIGURE 13 (CONTINUED)</i>	77
Revenue Forecast Projections for Cancer Biomarker Discovery	77
Revenue Forecast Projections...(Continued)	78
Revenue Forecast Projections for Cardiovascular Biomarkers	79
Revenue Projections for CNS Biomarker Discovery	80
PROMISING BIOMARKERS DISCOVERED FOR DIFFERENT THERAPEUTIC DISCIPLINES	81
BIOMARKERS IN CARDIOVASCULAR APPLICATIONS	81
Galectin-3 – A Marker of Acute Heart Failure	82

Metabolic Biomarker for Myocardial Ischemia	82
NT-ProBNP Biomarker	83
Identification of Plasma Biomarkers for Statin-Induced Myopathy	83
Deciphering the IL-7R Pathway in a Mechanistic Understanding of Multiple Sclerosis (MS)	84
Biomarkers for Traumatic Brain Injury	85
Multi-Panel Biomarkers for Alzheimer's Disease (AD)	85
Multi-Panel Biomarkers...(Continued)	86
Multi-Panel Biomarkers...(Continued)	87
Common Challenges in Cancer Biomarkers.....	88
Promising Cancer Biomarkers	89
Biomarkers for Melanoma Recurrence	89
Promising Biomarker for Pancreatic Cancer.....	89
Prostrate Cancer Biomarkers.....	90
B7-H3 Immune Molecule as a Promising Marker in Prostrate Cancer	91
Biomarkers for Gastric Cancer	92
Biomarker for Hepatocellular Carcinoma	92
Mitochondrial DNA Marker for Different Cancer Types	93
Promising Breast Cancer Biomarkers Using Functional Proteomics Platform	93
Proteomics Technologies for Breast Cancer Biomarker Research.....	94
FOXP3-a Potential Breast Cancer Biomarker	94
DNA Methylation Markers for Cancer	95
PROTEIN BIOMARKERS DETECTED FOR ISCHAEMIC LIVER INJURY	96
Protein Biomarkers Detected for...(Continued)	97
COMPANY PROFILES	98
Epigenomics, Inc.....	99
DIGILAB BIOVISION GMBH.....	100
CAPRION PROTEOMICS	101
Caprion Proteomics (Continued).....	102
CALIBRANT BIOSYSTEMS INC.	103
CORRELOGIC SYSTEMS, INC.	104
BG MEDICINE INC.....	105
BG Medicine Inc. (Continued).....	106
HUMAN METABOLOME TECHNOLOGIES INC.	107
PHENOMENOME DISCOVERIES INC.....	108
PRNOTA NV.....	109
Nonlinear USA Inc.	110
BANYAN BIOMARKERS	111

GENENEWS LIMITED	112
POWER3MEDICAL PRODUCTS INC.....	113
GENEDATA AG	114
Genedata GmbH	114
Genedata Inc.....	114
Genedata Inc.....	114
Genedata KK	114
METANOMICS HEALTH GMBH	115
EXAGEN DIAGNOSTICS INC.....	115
U.S. GENOMICS.....	116
ROSETTA GENOMICS LTD.	117
Rosetta Genomics Inc.	117
PROTEOME SCIENCES PLC.....	118
SOMALOGIC INC.....	119
UPSTREAM BIOSCIENCES.....	120
VERMILLION INC.	120
TARGET DISCOVERY INC.	121
PATENT ANALYSIS	122
PATENT ANALYSIS (CONTINUED).....	123
<i>FIGURE 14 U.S. PATENT TREND ANALYSIS, BIOMARKER PATENTS</i> <i>ISSUED FOR DISEASE APPLICATIONS, 2004-2007</i>	<i>124</i>
<i>FIGURE 15 EUROPEAN PATENT TREND ANALYSIS FOR</i> <i>BIOMARKER DISCOVERY 2004-2007.....</i>	<i>124</i>
<i>FIGURE 16 GLOBAL BIOMARKER PATENTS FOR DIFFERENT</i> <i>DISEASE APPLICATIONS, 2005-2007.....</i>	<i>125</i>
<i>TABLE 23 MAJOR U.S. PATENTS ISSUED FOR BIOMARKERS, 2006</i> <i>AND 2007</i>	<i>125</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>126</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>127</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>128</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>129</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>130</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>131</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>132</i>
<i>TABLE 23 (CONTINUED).....</i>	<i>133</i>
<i>TABLE 24 U.S. BIOMARKER PATENTS ISSUED IN 2007, BY</i> <i>DIFFERENT DISEASE APPLICATIONS</i>	<i>133</i>
<i>TABLE 25 EUROPEAN PATENTS PERTAINING TO BIOMARKER</i> <i>DISCOVERY ISSUED IN 2006 AND 2007</i>	<i>134</i>
<i>TABLE 25 (CONTINUED).....</i>	<i>135</i>
<i>TABLE 25 (CONTINUED).....</i>	<i>136</i>
<i>TABLE 25 (CONTINUED).....</i>	<i>137</i>
<i>TABLE 25 (CONTINUED).....</i>	<i>138</i>
Correlogic Systems, Inc. (Patent Number 7,096,206)	138

Roche Diagnostics Operations, Inc. (Patent Number 7,205,118).....	139
Proteomyx Inc. (Patent Number 7,029,855).....	139
Epigenomics AG (Patent Number 7,229,759).....	140
Lovelace Respiratory Research Institute (Patent Number 7,214,485).....	140
Agensys Inc. (Patent Number 7,250,498).....	140
Agensys Inc. (Patent Number 7,227,008).....	140
Dana-Farber Cancer Institute (Patent Number 7,250,283)	141
B.R.A.H.M.S Aktiengesellschaft (Patent Number 7,235,368).....	141
Nanogen Inc. (Patent Number 7,179,605).....	141
Ciphergen Biosystems Inc. (Patent Number 7,160,734).....	142
Myriad Genetics Inc. (Patent Number 7,250,497).....	142
Artemis Proteomics, Ltd. (Patent Number 7,229,638).....	142
Sanofi-Aventis Deutschland GmbH (Patent Number 7,227,006).....	142
Bristol-Myers Squibb Company (Patent Number 7,186,564).....	142
Digilab BioVisioN GmbH (Patent Number 7,202,044).....	143
REGULATORY PERSPECTIVE ON BIOMARKER DISCOVERY.....	144
REGULATORY FRAMEWORK.....	144
REGULATORY INSIGHTS TOWARDS MOLECULAR DIAGNOSTICS.....	145
Regulation on ASRs Specific Reagents.....	146
Regulation on ASRs ... (Continued).....	147
TAILOR-Rx Trial for Oncotype Dx—NCI Funding Initiative.....	148
<i>TABLE 26 CATEGORIES OF PATIENT STRATIFICATION BASED ON RECURRENCE SCORE USING ONCOTYPE DX</i>	149
MammaPrint Clinical Study—European Organization for research and treatment of cancer and Agendia collaboration.....	149
CPI: Critical Path Initiative.....	150
Need for Effective Biomarkers.....	151
<i>TABLE 27 DIFFERENT PARTNERSHIPS THROUGH THE CPI</i>	151
<i>TABLE 27 (CONTINUED)</i>	152
OVERVIEW OF THE CURRENT BIOMARKER INITIATIVES.....	152
BIOMARKER CONSORTIUM.....	153
<i>TABLE 28 CORE MEMBERS OF THE BIOMARKER CONSORTIUM</i>	153
<i>TABLE 29 INDUSTRY PARTNERS IN THE BIOMARKER CONSORTIUM</i>	153
<i>TABLE 29 (CONTINUED)</i>	154

<i>TABLE 30 INDUSTRY PARTICIPANTS FUNDING THE FDG-PET</i>	
<i>LUNG AND LYMPHOMA PROJECTS</i>	154
HIV SURROGATE MARKERS COLLABORATIVE GROUP	154
THE SNP CONSORTIUM AND THE INTERNATIONAL	
HAPMAP PROJECT	155
ONCOLOGY BIOMARKERS QUALIFICATION INITIATIVE	
(OBQI)-A FEDERAL INITIATIVE	155
HESI BIOMARKERS TECHNICAL COMMITTEE	156
<i>TABLE 31 HESI BIOMARKER COMMITTEE-INDUSTRY MEMBERS</i>	156
TRANSLATIONAL RESEARCH WORKING GROUP	157
INTERNATIONAL CANCER BIOMARKER CONSORTIUM	
(ICBC)	157
EPA'S STAR RESEARCH GRANTS FOR BIOMONITORING	157
INTERNATIONAL SCENARIO	158
<i>TABLE 32 INDUSTRY PARTICIPANT MEMBERS OF THE IMI</i>	
<i>INITIATIVE</i>	159
RESEARCH PROJECT UNDER THE IMI- ADDNEUROMED	160
MEDICAMENTOS INNOVADORES (SPAIN)	161
<i>TABLE 33 MULTI-DISCIPLINARY PROJECTS UNDERTAKEN BY TI</i>	
<i>PHARMA</i>	162
<i>TABLE 34 INDUSTRY PARTICIPANT MEMBERS OF TI PHARMA</i>	163
DTI SAFETY BIOMARKERS FUNDING –UNITED KINGDOM	164
CONCLUSION	165
PHARMACEUTICAL R&D OUTLOOK ON BIOMARKERS	166
INTRODUCTION	166
<i>TABLE 35 PREDICTIVE SAFETY TESTING CONSORTIUM:</i>	
<i>PHARMACEUTICAL COMPANIES</i>	167
INTRODUCTION (CONTINUED)	168
INTRODUCTION (CONTINUED)	169
INSIGHTS ON STRATIFIED MEDICINE	170
INSIGHTS ON STRATIFIED MEDICINE (CONTINUED)	171
MARKET DRIVERS	172
<i>TABLE 36 MARKET DRIVERS FOR BIOMARKERS IN CLINICAL</i>	
<i>TRIALS</i>	172
INTEGRATION OF BIOMARKERS TO IMPROVE SUCCESS	
RATES IN CLINICAL TRIALS	173
ENCOURAGEMENT FROM THE REGULATORY	
FRAMEWORK SPURS MARKET OPPORTUNITIES FOR	
BIOMARKER RESEARCH	173
NEED FOR BIOMARKERS WITH HIGH SPECIFICITY AND	
RELIABILITY	173
SYSTEMS BIOLOGY: THE RATIONALIZED APPROACH TO	
INCREASED EFFICIENCY OF NEW DRUG	
DEVELOPMENT	174

CHALLENGES FACING BIOMARKERS IN CLINICAL TRIALS.....	174
TARGETED THERAPIES IN THE ONCOLOGY PRODUCT PORTFOLIO	175
HERCEPTIN	176
GLEEVEC/GLIVEC	177
TYKERB	177
AVASTIN	177
TARCEVA.....	177
NEXAVAR	177
ERBITUX.....	178
EXELIXIS' XL880	178
AVALON'S AVN944.....	179
SUPERGEN'S MP470	179
REVENUE PROJECTIONS FOR BIOMARKERS IN CLINICAL TRIALS	179
<i>TABLE 37 GLOBAL REVENUE PROJECTIONS FOR BIOMARKERS IN CLINICAL TRIAL APPLICATIONS, THROUGH 2012 (\$ MILLIONS)</i>	180
<i>FIGURE 17 GLOBAL REVENUE PROJECTIONS FOR BIOMARKER APPLICATIONS IN CLINICAL TRIALS, 2005-2012 (\$ MILLIONS)</i>	181
REVENUE PROJECTIONS (CONTINUED).....	182
MARKETS BY MOLECULAR DIAGNOSTICS	183
INTRODUCTION	183
OUTLOOK FOR BIOMARKERS FROM A MOLECULAR DIAGNOSTICS PERSPECTIVE.....	183
BIOBANKING: CRITICAL TO REALIZE THE MAXIMUM POTENTIAL OF MODERN DAY MEDICINE.....	184
STANDARDIZATION OF PRE-ANALYTICAL TECHNIQUES	185
NEED FOR BIOMARKERS IN DIAGNOSTICS.....	185
<i>TABLE 38 EXAMPLES OF COMMON BIOMARKERS</i>	186
SEGMENTATION	186
<i>TABLE 39 SEGMENTATION OF BIOMARKER APPLICATIONS IN MOLECULAR DIAGNOSTICS</i>	187
OUTLINE ON THE MOLECULAR DIAGNOSTICS INDUSTRY	187
<i>TABLE 40 KEY FOCUS OF BIOMARKERS IN MOLECULAR DIAGNOSTICS</i>	187
<i>TABLE 41 POTENTIAL CLINICAL APPLICATIONS FOR PCR TECHNOLOGY</i>	188
<i>TABLE 42 NUCLEIC ACID AMPLIFICATION TECHNOLOGIES</i>	189
EMERGING TECHNOLOGY PLATFORMS.....	190
GLOBAL FORECAST PROJECTIONS BY DIFFERENT DIAGNOSTIC APPLICATIONS	191
<i>TABLE 43 GLOBAL BIOMARKER MARKETS, BY MOLECULAR DIAGNOSTICS APPLICATION, THROUGH 2012 (\$ MILLIONS)</i>	191

<i>FIGURE 18 GLOBAL BIOMARKER MARKETS, BY MOLECULAR DIAGNOSTICS APPLICATION, 2005-2012 (\$ MILLIONS)</i>	192
<i>TABLE 44 GLOBAL BIOMARKERS MARKET, BY MOLECULAR DIAGNOSTICS APPLICATION, 2005-2012 (%)</i>	192
<i>FIGURE 19 GLOBAL BIOMARKERS MARKET, BY MOLECULAR DIAGNOSTICS APPLICATION, 2007 (%)</i>	193
<i>TABLE 45 GLOBAL BIOMARKER MARKETS FOR MOLECULAR DIAGNOSTICS APPLICATION, BY REGION, THROUGH 2012 (\$ MILLIONS)</i>	194
<i>FIGURE 21 GLOBAL BIOMARKERS MARKET FOR MOLECULAR DIAGNOSTICS APPLICATIONS, BY REGION, 2005-2012 (\$ MILLION)</i>	194
GLOBAL FORECAST PROJECTIONS...(CONTINUED)	195
GLOBAL FORECAST PROJECTIONS...(CONTINUED)	196
MARKET DRIVERS	197
<i>TABLE 46 MARKET DRIVERS FOR BIOMARKERS IN MOLECULAR DIAGNOSTICS</i>	197
RISING VOLUMES IN THE INFECTIOUS DISEASE DIAGNOSTICS SEGMENT DRIVE THE MARKET FOR MOLECULAR TESTING	197
TECHNOLOGY ADVANCEMENTS IN MOLECULAR MARKERS: NEXT GENERATION LAUNCH PAD IN MOLECULAR DIAGNOSTICS.....	198
QUANTITATIVE TESTING MEASUREMENTS PROVIDE AN IMPETUS TO BETTER CANCER MANAGEMENT.....	198
Improved Reimbursement Plans by Private Payers and CMS Fuel the Market for Molecular Based Cancer Tests.....	198
HIGH ENABLING TECHNOLOGIES AUGMENT THE MARKET FOR BIOMARKER DISCOVERY AND DEVELOPMENT.....	199
INDIVIDUALIZED TREATMENTS AND COMPANION DIAGNOSTICS FUEL MARKET UPTAKE FOR MOLECULAR DIAGNOSTICS.....	199
EXPIRATION OF ROCHE'S PCR PATENTS CREATING A WEALTH OF OPPORTUNITIES FOR MARKET PARTICIPANTS	200
MARKET RESTRAINTS	200
<i>TABLE 47 MARKET RESTRAINTS FOR BIOMARKERS IN MOLECULAR DIAGNOSTICS</i>	200
RAISING CONCERNS ON THE VALIDATION OF NOVEL MOLECULAR BIOMARKERS: A NEAR-TERM DIFFICULT ROAD AHEAD	201

HIGH COSTS ASSOCIATED WITH BIOMARKER RESEARCH AND DEVELOPMENT STALLS PRODUCT INTRODUCTION IN MOLECULAR DIAGNOSTICS.....	201
UNCERTAINTIES IN PHARMACOGENOMIC TESTING HINDERS MARKET ADOPTION	202
INTELLECTUAL PROPERTY ISSUES: ANOTHER IMPEDIMENT IN THE WORLD OF BIOMARKERS	202
HESITATION FROM THE PAYER SECTOR COUPLED WITH SKEPTICISM IN REIMBURSEMENT FURTHER HINDER MARKET FOR PHARMACOGENOMIC APPLICATIONS	202
ETHICAL ISSUES REGARDING PATIENT'S CONFIDENTIALITY AND RIGHTS POSE ANOTHER AREA OF CONCERN	203
COMPETITIVE LANDSCAPE.....	203
<i>TABLE 48 FDA-APPROVED MOLECULAR DIAGNOSTIC SYSTEMS.....</i>	<i>203</i>
<i>TABLE 48 (CONTINUED).....</i>	<i>204</i>
UNITED STATES MOLECULAR DIAGNOSTICS MARKET.....	205
EUROPEAN MOLECULAR DIAGNOSTICS.....	206
<i>TABLE 49 TOTAL EUROPEAN MOLECULAR DIAGNOSTICS MARKET BY REGION, THROUGH 2012 (\$ MILLIONS)</i>	<i>206</i>
<i>FIGURE 22 TOTAL EUROPEAN MOLECULAR DIAGNOSTICS MARKET BY REGION, 2005-2012.....</i>	<i>207</i>
MOLECULAR INFECTIOUS DISEASE DIAGNOSTICS.....	208
<i>TABLE 50 MOLECULAR TESTS AVAILABLE FOR INFECTIOUS DISEASE PATHOGENS</i>	<i>209</i>
<i>TABLE 50 (CONTINUED).....</i>	<i>210</i>
<i>TABLE 51 END-USER REQUIREMENTS FOR MOLECULAR ASSAY ADOPTION</i>	<i>210</i>
Asia-Pacific NAT Markets.....	210
THE REVENUE FORECAST FOR GLOBAL INFECTIOUS DISEASE DIAGNOSTICS MARKET.....	211
THE REVENUE FORECAST FOR GLOBAL...(CONTINUED)	212
<i>TABLE 52 GLOBAL MOLECULAR INFECTIOUS DISEASE DIAGNOSTICS MARKET, BY REGION, THROUGH 2012 (\$ MILLIONS).....</i>	<i>213</i>
<i>FIGURE 23 GLOBAL MOLECULAR INFECTIOUS DISEASE DIAGNOSTICS MARKET, BY REGION, 2005-2012 (\$ MILLIONS</i>	<i>213</i>
COMPETITIVE LANDSCAPE.....	214
COMPETITIVE LANDSCAPE (CONTINUED)	215
NAT CANCER DIAGNOSTICS.....	216
<i>TABLE 53 POTENTIAL BENEFITS EXPECTED FROM CANCER BIOMARKERS.....</i>	<i>217</i>
NAT CANCER DIAGNOSTICS MARKET	217
Protein Isoform Testing.....	218

<i>TABLE 54 COMPANIES INVOLVED IN ISOFORM TESTING</i>	219
SCOPE OF THE NAT CANCER DIAGNOSTICS SEGMENT	219
REVENUE FORECAST FOR NAT CANCER DIAGNOSTICS	219
<i>TABLE 55 GLOBAL NAT CANCER DIAGNOSTICS MARKET BY</i> <i>REGION, THROUGH 2012 (\$ MILLIONS)</i>	220
<i>FIGURE 24 GLOBAL NAT CANCER DIAGNOSTICS MARKET, BY</i> <i>REGION, 2005-2012 (\$ MILLIONS)</i>	221
REVENUE FORECAST FOR NAT CANCER ... (CONTINUED)	222
REVENUE FORECAST FOR NAT CANCER ... (CONTINUED)	223
PRODUCT PORTFOLIO FOR GENETIC PREDISPOSITION AND PROGNOSTIC TESTING IN CANCER	224
Pathwork Tissue of Origin Test: Under FDA Review	225
<i>TABLE 56 NAT CANCER DIAGNOSTIC PRODUCTS (DIAGNOSTIC</i> <i>AND PROGNOSTIC CANCER MARKERS)</i>	226
<i>TABLE 56 (CONTINUED)</i>	227
COMPETITIVE LANDSCAPE	228
COMPETITIVE LANDSCAPE (CONTINUED)	229
PHARMACOGENOMIC APPLICATIONS /COMPANION DIAGNOSTICS	230
Market Overview (Continued)	231
Market Overview (Continued)	232
<i>TABLE 57 FDA- APPROVED COMPANION DIAGNOSTICS</i>	233
HER-2 Genetic Testing	234
Invader UGT1A1 Molecular Assay	235
Amplichip CYP450 Test	235
<i>TABLE 58 USE OF CYP2D6 FOR METABOLIZING DRUGS USED FOR</i> <i>CERTAIN DISEASES</i>	236
Amplichip CYP450 Test (Continued)	237
<i>TABLE 59 DRUG-COMPANION DIAGNOSTIC PRODUCTS</i>	238
COMPETITIVE LANDSCAPE	238
COMPETITIVE LANDSCAPE (CONTINUED)	239
COMPETITIVE LANDSCAPE (CONTINUED)	240
REVENUE FORECAST FOR GLOBAL PHARMACOGENOMIC MARKETS	241
<i>TABLE 60 GLOBAL PHARMACOGENOMICS MARKET FORECAST BY</i> <i>REGION, THROUGH 2012 (\$ MILLIONS)</i>	241
<i>FIGURE 25 GLOBAL PHARMACOGENOMICS MARKET FORECAST</i> <i>BY REGION, 2005-2012 (\$ MILLIONS)</i>	242
REVENUE FORECAST FOR GLOBAL ... (CONTINUED)	243