

2011 BIOTECHNOLOGY RESEARCH REVIEW.....	XVI
FOREWORD .....	XVI
CHAPTER ONE: SAMPLE PREPARATION IN GENOMICS, PROTEOMICS, AND EPIGENOMICS: GLOBAL MARKETS (BIO089A).....	1
INTRODUCTION .....	1
STUDY GOALS AND OBJECTIVES .....	1
REASONS FOR DOING THIS STUDY .....	1
SCOPE AND FORMAT.....	2
METHODOLOGY AND INFORMATION SOURCES.....	2
INTENDED AUDIENCE.....	2
ANALYST CREDENTIALS .....	2
RELATED REPORTS .....	3
BCC ONLINE SERVICES .....	3
DISCLAIMER.....	4
SUMMARY.....	4
<i>TABLE 1 GLOBAL MARKET FOR SAMPLE PREPARATION     REAGENTS AND PRODUCTS USED IN LIFE SCIENCE RESEARCH     BY SEGMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	5
<i>FIGURE 1 GLOBAL MARKET FOR SAMPLE PREPARATION     REAGENTS AND PRODUCTS USED IN LIFE SCIENCE RESEARCH     BY SEGMENT, 2009–2016 (\$ MILLIONS)</i> .....	6
OVERVIEW.....	6
<i>TABLE 2 GLOBAL MARKET FOR COMMON REAGENTS AND     PRODUCTS IN THE LIFE SCIENCE TOOLS INDUSTRY BY     SEGMENT, THROUGH 2016 (\$ BILLIONS)</i> .....	7
<i>FIGURE 2 GENOME AND GENE ANALYSIS WORKFLOW</i> .....	8
<i>FIGURE 3 PROTEIN ANALYSIS WORKFLOW</i> .....	9
MAJOR TRENDS AND DRIVERS IN THE SAMPLE PREP SEGMENT OF LIFE SCIENCE TOOLS INDUSTRY .....	9
BIOMARKER RESEARCH AND DIAGNOSTICS INDUSTRY .....	9
INNOVATIVE TECHNOLOGIES AND SCIENTIFIC TRENDS .....	10
Next-Generation Sequencing .....	10
Scientific Trends.....	10
Stem Cell Research.....	10
Epigenomic Research .....	11
GOVERNMENT POLICIES AND FUNDING.....	11
MAIN MARKET PARTICIPANTS IN THE SAMPLE PREP INDUSTRY .....	11
MAIN MARKET PARTICIPANTS IN ... (CONTINUED).....	12
<i>TABLE 3 GLOBAL MARKET SHARES OF THE SAMPLE PREP     INDUSTRY BY LIFE SCIENCE RESEARCH SEGMENT, 2011 (%)</i> .....	13
GEOGRAPHIC DISTRIBUTION OF THE SAMPLE PREP MARKET .....	13

<i>TABLE 4 GLOBAL MARKET SHARES OF THE SAMPLE PREP</i>	
<i>INDUSTRY BY GEOGRAPHIC REGION, 2011 (%)</i> .....	14
TECHNOLOGY PATENTS IN THE SAMPLE PREP INDUSTRY.....	14
TECHNOLOGY PATENTS IN THE ... (CONTINUED).....	15
TECHNOLOGY PATENTS IN THE ... (CONTINUED).....	16

CHAPTER TWO: FLOW CYTOMETRY: PRODUCTS, TECHNOLOGIES AND GLOBAL MARKETS (BIO085A).....	17
INTRODUCTION .....	17
STUDY BACKGROUND.....	17
STUDY GOALS AND OBJECTIVES .....	17
INTENDED AUDIENCE.....	18
SCOPE AND FORMAT.....	18
RESEARCH METHODOLOGY AND INFORMATION	
SOURCES .....	18
ABOUT THE ANALYST.....	19
RELATED BCC REPORTS.....	19
SUMMARY.....	19
<i>TABLE 5 GLOBAL FLOW CYTOMETRY MARKET BY PRODUCT,</i> <i>THROUGH 2015 (\$ MILLIONS)</i> .....	20
<i>FIGURE 4 GLOBAL FLOW CYTOMETRY MARKET BY PRODUCT,</i> <i>2008–2015 (\$ MILLIONS)</i> .....	21
MARKET DRIVERS .....	21
EMERGING MAINSTREAM ROLE IN DRUG DISCOVERY AND DEVELOPMENT.....	21
PRODUCT/TECHNOLOGY INNOVATIONS.....	22
WIDE RANGE OF APPLICATIONS.....	22
CONTRACT RESEARCH AND CLINICAL TRIAL ORGANIZATIONS.....	23
RESTRAINTS .....	24
HIGH COST OF INSTRUMENTS .....	24
LACK OF AWARENESS .....	24
REQUIREMENT OF HIGHLY TRAINED PERSONNEL .....	24
OPPORTUNITIES .....	25
MARKET OVERVIEW .....	25
EVOLUTION OF FLOW CYTOMETRY.....	26
FLOW CYTOMETRY CAPABILITY ANALYSIS.....	27
FLOW CYTOMETRY CAPABILITY ... (CONTINUED).....	28
FLOW CYTOMETRY IMMUNOPHENOTYPING .....	29
<i>FIGURE 5 FLOW CYTOMETRY IMMUNOPHENOTYPING VERSUS</i> <i>CONVENTIONAL MICROSCOPY-BASED IMMUNOPHENOTYPING</i> <i>TECHNIQUES</i> .....	30
<i>FIGURE 6 DISEASE, DIAGNOSIS, AND MANAGEMENT POTENTIAL</i> <i>OF FCT IMMUNOPHENOTYPING</i> .....	31

USES OF FLOW CYTOMETRY IN RESOURCE-POOR REGIONS IS GAINING IMPORTANCE.....	32
ANALYSES: KEY PLAYERS, COMPETITORS, AND MARKETS .....	33
FIGURE 7 GLOBAL FLOW CYTOMETRY MARKET BY PRODUCT (%).....	34
FIGURE 8 MARKET PLAYER ANALYSIS—STRATEGIES AND DEVELOPMENTS.....	35
ANALYSES: KEY PLAYERS, ... (CONTINUED) .....	36
ANALYSES: KEY PLAYERS, ... (CONTINUED) .....	37
EMERGING ECONOMIES AND TECHNOLOGY ADOPTION .....	38
STRATEGIC RECOMMENDATIONS .....	38
PATENT ANALYSIS .....	39
FIGURE 9 PATENT ANALYSIS BY TYPE OF PRODUCT, 2008–2010 (%).....	39
FIGURE 9 (CONTINUED) .....	40
FIGURE 10 PATENTS BY GEOGRAPHY, 2008–2010 (%).....	40
 CHAPTER THREE: BIOBANKING TECHNOLOGIES AND GLOBAL MARKETS (BIO084A) .....	41
INTRODUCTION .....	41
STUDY GOALS AND OBJECTIVES .....	41
REASONS FOR DOING THE STUDY.....	41
SCOPE OF REPORT.....	42
INTENDED AUDIENCE.....	42
ANALYST CREDENTIALS .....	43
METHODOLOGY AND INFORMATION SOURCES.....	43
RELATED BCC REPORTS.....	44
SUMMARY.....	44
TABLE 6 GLOBAL BIOBANKING REVENUES FORECAST BY SEGMENT, THROUGH 2015 (\$ MILLIONS) .....	45
FIGURE 11 GLOBAL BIOBANKING REVENUES FORECAST BY SEGMENT, 2009–2015 (\$ MILLIONS) .....	46
OVERVIEW.....	47
CURRENT STATE OF THE INDUSTRY .....	48
THE PROCESS OF BIOBANKING .....	49
HISTORICAL CONTEXT .....	50
SCIENTIFIC AND COMMERCIAL RELEVANCE OF BIOBANKS .....	51
Scientific and commercial ... (Continued) .....	52
TABLE 7 CUMULATIVE NUMBER OF DNA SAMPLES BANKED IN POPULATION-BASED STUDIES*, 1970–2009 (RECRUITMENT START DATE) .....	53
TABLE 8 VALUE OF DNA SAMPLES STORED, THROUGH 2015 (\$ MILLIONS).....	53
TABLE 9 NIH-SPONSORED CLINICAL TRIALS CONDUCTING GENE EXPRESSION PROFILING, 2000–2008 (NO.).....	54

MODERN BIOBANKS—PUBLIC SECTOR .....	54
POPULATION-BASED BIOBANKS .....	54
DISEASE-BASED BIOBANKS .....	54
BIOBANKING COSTS .....	55
Biobanking costs (Continued) .....	56
DRIVERS OF BIOBANKS EXPANSION .....	57
BARRIERS TO BIOBANKS EXPANSION .....	57
BIOBANKING TRENDS AND FORECAST .....	58
FORECAST FOR BIOBANK INVOLVEMENT IN FUTURE	
BIOMEDICAL DISCOVERIES .....	59
FORECAST FOR BIOBANK INVOLVEMENT IN	
(CONTINUED) .....	60
FORECAST FOR BIOBANK INVOLVEMENT IN	
(CONTINUED) .....	61
CHAPTER FOUR: NEXT-GENERATION CANCER DIAGNOSTICS:	
TECHNOLOGIES AND GLOBAL MARKETS (BIO081A) .....	62
INTRODUCTION .....	62
STUDY GOALS AND OBJECTIVES .....	62
REASONS FOR DOING THE STUDY .....	62
INTENDED AUDIENCE .....	63
SCOPE OF REPORT .....	63
METHODOLOGY .....	64
INFORMATION SOURCES .....	64
RELATED BCC REPORTS .....	64
ANALYST CREDENTIALS .....	65
SUMMARY .....	65
<i>TABLE 10 GLOBAL VALUE OF NEXT-GENERATION CANCER</i>	
<i>DIAGNOSTICS BY ANALYSIS TYPE, THROUGH 2015 (\$</i>	
<i>MILLIONS)</i> .....	66
<i>FIGURE 12 GLOBAL VALUE OF NEXT-GENERATION CANCER</i>	
<i>DIAGNOSTICS BY ANALYSIS TYPE, 2009–2015 (\$ MILLIONS)</i> .....	66
OVERVIEW .....	67
<i>TABLE 11 SCOPE OF THIS REPORT</i> .....	68
MARKET POTENTIAL OF NEXT-GENERATION CANCER	
DIAGNOSTICS .....	69
<i>TABLE 12 GLOBAL VALUE OF NEXT-GENERATION CANCER</i>	
<i>DIAGNOSTICS BY INDICATION, THROUGH 2015 (\$ MILLIONS)</i> .....	69
FORCES DRIVING MARKET GROWTH .....	70
<i>TABLE 13 FORCES DRIVING CANCER DIAGNOSTICS GROWTH</i> .....	70
NEXT-GENERATION CANCER DIAGNOSTICS PLATFORMS .....	71
<i>TABLE 14 GLOBAL VALUE OF NEXT-GENERATION CANCER</i>	
<i>DIAGNOSTICS BY TECHNOLOGY PLATFORM, THROUGH 2015 (\$</i>	
<i>MILLIONS)</i> .....	72

NEXT-GENERATION CANCER DIAGNOSTICS PRODUCT LIFE CYCLE STATUS.....	72
<i>TABLE 15 DIAGNOSTIC PRODUCT LIFE CYCLE STATUS</i> .....	73
NEXT-GENERATION CANCER DIAGNOSTICS INDUSTRY.....	74
<i>TABLE 16 NEXT-GENERATION CANCER DIAGNOSTICS INDUSTRY</i> .....	74
NEXT-GENERATION CANCER ... (CONTINUED).....	75
 CHAPTER FIVE: RNAI DRUG DELIVERY: TECHNOLOGIES AND	
GLOBAL MARKETS (BIO076A) .....	76
INTRODUCTION .....	76
STUDY GOALS AND OBJECTIVES .....	76
REASONS FOR DOING THE STUDY.....	76
SCOPE OF REPORT.....	77
INTENDED AUDIENCE.....	77
METHODOLOGY.....	77
RELATED BCC STUDIES .....	78
ANALYST CREDENTIALS .....	78
SUMMARY.....	78
SUMMARY (CONTINUED) .....	79
<i>TABLE 17 GLOBAL MARKET FOR RNAI DRUG DELIVERY TECHNOLOGIES, THROUGH 2015 (\$ MILLIONS)</i> .....	80
<i>FIGURE 13 GLOBAL MARKET FOR RNAI DRUG DELIVERY TECHNOLOGIES, 2009–2015 (\$ MILLIONS)</i> .....	80
RNAI DRUG DELIVERY .....	80
RNAI DISCOVERED .....	80
IMPORTANCE OF DELIVERY FOR RNAI THERAPEUTICS.....	81
DRUG DELIVERY TECHNOLOGIES.....	82
<i>TABLE 18 ROLE OF DRUG DELIVERY</i> .....	83
NEED FOR NEW TECHNOLOGIES.....	83
RNAI DELIVERY TOOLS FOR DRUG DISCOVERY AND DEVELOPMENT .....	84
siRNA Screening.....	84
shRNA Screening.....	85
CHALLENGES TO OVERCOME IN DELIVERING RNAI .....	85
<i>TABLE 19 RNAI DELIVERY APPROACHES</i> .....	86
DELIVERY TECHNIQUES.....	87
VECTOR-BASED DELIVERY.....	87
VECTOR-BASED RNAI FOR <i>IN VIVO</i> RNAI EXPERIMENTS .....	87
<i>TABLE 20 COMPANIES WITH PLASMID RNAI VECTORS</i> .....	88
Viral Vectors for Delivery of siRNA.....	88
<i>TABLE 21 RNAI VIRAL VECTOR DELIVERY METHODS</i> .....	89
<i>TABLE 22 LENTIVIRAL DELIVERY PRODUCTS AND COMPANIES</i> .....	89
Nonviral siRNA Delivery .....	89
Hydrodynamic IV Injection .....	90
Electroporation.....	90

Carrier-Mediated Delivery .....	90
Lipid-Based siRNA Delivery .....	90
Lipid-Based siRNA Delivery (Continued).....	91
Polymer-Based siRNA Delivery .....	92
Combined Lipid and Polymer Carriers for Better siRNA Delivery .....	93
Peptide-Mediated siRNA Delivery .....	94
Antibody-Mediated siRNA Delivery.....	95
Dendrimer-Mediated siRNA Delivery.....	96
Stem-Cell-based Delivery .....	96
Light Controllable Delivery of siRNA .....	96
PROPRIETARY DELIVERY PLATFORMS .....	97
SYSTEMIC DELIVERY STRATEGIES .....	98
<i>TABLE 23 THERAPEUTIC STRATEGIES.....</i>	<i>99</i>
LOCALIZED DELIVERY.....	99
TARGETED CELLULAR DELIVERY .....	100
EXPRESSION-BASED STRATEGIES.....	101
Expression-Based Strategies (Continued).....	102
RNAI DELIVERY AND IMPACT ON THERAPEUTIC DEVELOPMENTS.....	103
New Developments .....	103
New Developments (Continued).....	104
Tissue Delivery .....	105
RNAi as Drugs .....	106
CURRENT NONBIOLOGICAL DELIVERY VEHICLES FOR SIRNAS .....	107
Simple Excipients .....	107
<i>TABLE 24 SIMPLE EXCIPIENTS FOR RNAI DELIVERY.....</i>	<i>108</i>
TRANSFECTION TECHNIQUES.....	108
Electroporation .....	108
Conjugates .....	108
<i>TABLE 25 CONJUGATES, PEPTIDES, AND PROTEINS, OTHERS.....</i>	<i>109</i>
Peptides and Proteins.....	109
Dynamic Polyconjugate Transfection .....	109
Polymer Carriers/Nanoparticles .....	110
<i>TABLE 26 POLYMER CARRIERS/NANOPARTICLES FOR RNAI DELIVERY .....</i>	<i>111</i>
Polymer Carriers/Nanoparticles (Continued).....	112
Liposomes and Lipoplexes.....	113
<i>TABLE 27 LIPOSOMES/LIPOPLEXES AND RNAI DELIVERY.....</i>	<i>113</i>
Case Study-siRNA in Mammalian Cells .....	114
Gene Silencing (RNAi) in Neuronal Cells.....	114
CONCERNS ABOUT RNAI DELIVERY .....	114

KEY COMPANIES AND THEIR DRUG DELIVERY	
TECHNOLOGIES FOR SIRNA .....	115
siRNA Transfection .....	115
<i>TABLE 28 COMPANIES INVOLVED IN DRUG DELIVERY</i>	
<i>TECHNOLOGIES FOR SIRNA</i> .....	116
Delivery as Particles or Complexes .....	116
Delivery with Modifications .....	117
SUMMARY .....	118
SUMMARY (CONTINUED) .....	119
 CHAPTER SIX: STEM CELL THERAPEUTICS FOR ONCOLOGY:	
TECHNOLOGIES AND GLOBAL MARKETS (BIO075A) .....	120
INTRODUCTION .....	120
STUDY GOALS AND OBJECTIVES .....	120
REASONS FOR DOING THIS STUDY .....	121
INTENDED AUDIENCE .....	121
SCOPE OF REPORT .....	122
METHODOLOGY .....	122
INFORMATION SOURCES .....	122
ANALYST CREDENTIALS .....	122
RELATED BCC REPORTS .....	123
SUMMARY .....	123
<i>TABLE 29 GLOBAL MARKET REVENUE FORECAST FOR STEM</i>	
<i>CELL THERAPEUTIC REGIMENS IN ONCOLOGY, THROUGH 2015</i>	
<i>(\$ MILLIONS)</i> .....	124
<i>FIGURE 14 GLOBAL MARKET REVENUE FORECAST FOR STEM</i>	
<i>CELL THERAPEUTIC REGIMENS IN ONCOLOGY, 2008–2015 (\$</i>	
<i>MILLIONS)</i> .....	124
OVERVIEW .....	125
HISTORY OF ONCOLOGY .....	125
HISTORY OF STEM CELLS IN ONCOLOGY .....	126
BRIEFING HISTORY OF STEM CELLS AS THERAPEUTICS,	
AND A FEW KEY ISSUES TO KEEP IN MIND .....	127
OTHER RELEVANT HISTORY .....	128
TYPES OF CANCER .....	129
<i>TABLE 30 TYPES OF CANCER INCLUDED IN THIS REPORT</i> .....	130
<i>TABLE 31 COMMON TYPES OF LYMPHOMA</i> .....	131
DEFINITION OF THE INDUSTRY .....	131
IMPORTANCE OF THE INDUSTRY .....	132
PRODUCT LIFE CYCLES .....	133
<i>TABLE 32 DRUG DEVELOPMENT LIFE CYCLE FOLLOWING</i>	
<i>DISCOVERY OF NEW DRUG</i> .....	134
DEVELOPMENT OF STEM CELLS IN ONCOLOGY .....	134
<i>TABLE 33 HISTORICAL PIPELINE OF FDA APPROVED</i>	
<i>THERAPEUTICS RELATING TO STEM AND PROGENITOR CELLS</i> .....	135

HUMAN CLINICAL DEVELOPMENT .....	135
NEW DRUG ACTIVITY .....	136
FUTURE DEVELOPMENTS .....	136
SIGNIFICANT “NEW” CLINICAL DEVELOPMENTS: 2008 TO THE PRESENT .....	136
Significant ... (Continued).....	137
<i>TABLE 34 KEY PHASE III AND IV STEM CELL CLINICAL TRIALS     WITH ESTIMATED COMPLETION DATES BETWEEN 2008 AND     2019 .....</i>	<i>138</i>
WITH AN EYE TOWARD THE FUTURE.....	139
WITH AN EYE TOWARD THE FUTURE (CONTINUED) .....	140
 CHAPTER SEVEN: GLOBAL BIOCHIP MARKETS: MICROARRAYS AND LAB-ON-A-CHIP (BIO049D) .....	 141
INTRODUCTION .....	141
STUDY GOALS AND OBJECTIVES .....	141
REASONS FOR DOING THE STUDY.....	141
INTENDED AUDIENCE.....	142
SCOPE AND FORMAT OF REPORT .....	142
METHODOLOGY.....	143
INFORMATION SOURCES .....	143
ANALYST CREDENTIALS .....	143
RELATED BCC REPORTS.....	144
OVERVIEW.....	144
<i>TABLE 35 BIOLOGY DOWNSIZING REVOLUTION.....</i>	<i>145</i>
BIOCHIP TYPES .....	145
<i>TABLE 36 COMPARISON OF THE TWO MAJOR BIOCHIP TYPES.....</i>	<i>146</i>
<i>TABLE 37 BIOCHIP NOMENCLATURE.....</i>	<i>147</i>
SCOPE OF REPORT .....	148
<i>TABLE 38 SCOPE OF REPORT .....</i>	<i>148</i>
MARKET POTENTIAL OF BIOCHIPS.....	149
<i>TABLE 39 GLOBAL VALUE OF BIOCHIP PRODUCTS BY     TECHNOLOGY, THROUGH 2016 (\$ MILLIONS).....</i>	<i>149</i>
<i>TABLE 40 GLOBAL VALUE OF DIAGNOSTIC BIOCHIPS BY     FUNCTION, THROUGH 2016 (\$ MILLIONS).....</i>	<i>150</i>
DRIVING FORCES FOR GROWTH IN BIOCHIPS MARKETS.....	151
<i>TABLE 41 FORCES DRIVING BIOCHIPS GROWTH.....</i>	<i>151</i>
GROWTH IN LIFE SCIENCE R&D FUNDING .....	152
<i>TABLE 42 2009–2010 STIMULUS FUNDING ALLOCATED TO U.S.     SCIENCE SPENDING (\$ MILLIONS).....</i>	<i>152</i>
DEVELOPMENT OF TARGETED, PERSONALIZED MEDICINES .....	153
COST-CONSCIOUS HEALTHCARE SYSTEM .....	154
RAPIDLY AGING POPULATION IN DEVELOPED REGIONS .....	154



NEED FOR MORE INNOVATIVE DIAGNOSTIC TESTING FORMATS .....	155
ONGOING DISCOVERIES IN GENOMICS AND PROTEOMICS .....	155
DISCOVERY OF GENE AND SNP DISEASE ASSOCIATIONS .....	155
THE BIOCHIP INDUSTRY .....	156
<i>TABLE 43 COMPARISON OF BIOCHIPS INDUSTRIES</i> .....	<i>156</i>
SUMMARY .....	157
<i>TABLE 44 GLOBAL VALUE OF BIOCHIP PRODUCTS BY END USE, THROUGH 2016 (\$ MILLIONS)</i> .....	<i>157</i>
<i>FIGURE 15 GLOBAL VALUE OF BIOCHIP PRODUCTS BY END USE, 2010–2016 (\$ MILLIONS)</i> .....	<i>158</i>
SUMMARY (CONTINUED) .....	159
 CHAPTER EIGHT: POLYMERASE CHAIN REACTION (PCR)	
TECHNOLOGIES AND GLOBAL MARKETS (BIO087A) .....	160
INTRODUCTION .....	160
STUDY GOALS AND OBJECTIVES .....	160
REASONS FOR DOING THIS STUDY .....	160
INTENDED AUDIENCE .....	160
SCOPE AND FORMAT .....	161
METHODOLOGY AND INFORMATION SOURCES .....	161
ANALYST CREDENTIALS .....	162
RELATED BCC RESEARCH REPORTS .....	162
SUMMARY .....	162
SUMMARY (CONTINUED) .....	163
<i>TABLE 45 GLOBAL PCR TECHNOLOGIES MARKET BY SEGMENT, THROUGH 2015 (\$ MILLIONS)</i> .....	<i>164</i>
<i>FIGURE 16 GLOBAL PCR TECHNOLOGIES MARKET BY SEGMENT, 2008–2015 (\$ MILLIONS)</i> .....	<i>164</i>
MARKET DRIVERS .....	164
RAPID PROGRESS IN PROTEOMICS AND GENOMICS .....	165
AVAILABILITY OF FUNDING INCREASES TECHNOLOGY DEVELOPMENT AND ADOPTION.....	165
RAPID GROWTH IN MOLECULAR DIAGNOSTIC INDUSTRY.....	166
PRODUCT INNOVATIONS INCREASE TECHNOLOGY ADOPTION AND APPLICATION AREAS.....	167
WIDE RANGE OF APPLICATIONS.....	168
MARKET RESTRAINTS .....	168
LACK OF AWARENESS .....	168
REQUIREMENT OF SKILLED LABOR .....	169
HIGH COST OF REAL-TIME PCR INSTRUMENTS.....	169
DEVELOPMENT OF ALTERNATIVE TECHNOLOGIES.....	169
OPPORTUNITIES AND CHALLENGES.....	169

<i>TABLE 46 GLOBAL PCR TECHNOLOGIES MARKET BY GEOGRAPHIC REGION, THROUGH 2015 (\$ MILLIONS)</i> .....	170
MARKET OVERVIEW .....	171
EVOLUTION OF PCR TECHNOLOGY AND ITS IMPACT ON THE HEALTHCARE INDUSTRY .....	171
<i>FIGURE 17 IMPACT OF PCR TECHNOLOGY ON THE HEALTHCARE ENVIRONMENT</i> .....	172
TRADITIONAL PCR VERSUS REAL-TIME PCR.....	173
<i>TABLE 47 TRADITIONAL PCR VERSUS REAL-TIME PCR</i> .....	173
KEY APPLICATION AREAS .....	174
<i>FIGURE 18 KEY APPLICATIONS OF PCR TECHNOLOGY</i> .....	174
PCR QUANTITATION METHODS .....	175
THE HUMAN GENOME PROJECT AND PCR.....	176
HUMAN MICROBIOME PROJECT AND PCR .....	177
TAQMAN PROBES AND MOLECULAR BEACONS: POTENTIAL ALTERNATIVES TO DYES USED IN REAL-TIME PCR .....	178
ALTERNATIVES TO PCR-BASED ANALYTICAL METHODS .....	179
<i>FIGURE 19 DISADVANTAGES OF PCR VS. THE ADVANTAGES OF ALTERNATIVES</i> .....	179
LOOP MEDIATED ISOTHERMAL AMPLIFICATION .....	180
REACTION DISPLACEMENT CHIMERIC .....	181
NUCLEIC ACID SEQUENCE-BASED AMPLIFICATION .....	181
TRANSCRIPTION-MEDIATED AMPLIFICATION .....	181
KEY APPLICATION AREAS .....	182
<i>FIGURE 20 KEY APPLICATIONS OF PCR</i> .....	182
PCR AND PUBLIC HEALTH SURVEILLANCE.....	183
PCR AND PUBLIC HEALTH SURVEILLANCE (CONTINUED) ....	184
EMERGING ECONOMIES AND TECHNOLOGY ADOPTION .....	185
FUTURE OF PCR.....	185
MARKET TRENDS/KEY INSIGHTS .....	186
KEY RECOMMENDATIONS/MARKET STRATEGIES.....	186
PATENT ANALYSIS .....	187
<i>FIGURE 21 PATENT ANALYSIS BY GEOGRAPHIC REGION, 2008–2010 (%)</i> .....	188
<i>FIGURE 22 PATENT ANALYSIS BY TYPE OF PRODUCT, 2008–2010 (%)</i> .....	189