

In Vitro Diagnostics: Market Analysis 2009-2024

Table 3.2 IVD Tests Whole Market Forecast 2009-2024 (\$bn)

	2008	2009	2010	2011	2012	2013	2014	2019	2024
Total IVD Market (\$bn)	█	█	█	█	█	█	█	█	█
Annual Growth %		█	█	█	█	█	█	█	█
CAGR %							█	█	█

Source: visiongain 2009. CAGR values are for 2009-2014, 2014-2019, and 2019-2024. Sales values are in \$b.

Table 3.1, Table 3.2 and Figure 3.1 display visiongain's forecast for the IVD market through 2024. The total market, worth █ in 2008, will grow at a compound annual growth rate of █% through 2014 and reach █ in that year. By 2019, the market will be worth █ and by 2024 the value will have grown to █.

3.2 Market Summary of Five IVD Tests with 2008 Sales of Over \$5bn

Figure 3.2 shows the growth projections for five IVD tests that had over █ in sales in 2008. Visiongain predicts that oncology tests will overtake cholesterol tests in the next 9-10 years, as oncology tests become more sensitive and widespread. The cancer market is wide open for new diagnostic tests, and visiongain predicts that new discoveries will spur that market within the next 10 years.

Genetic tests will be the most valuable IVD market, with their use becoming more widespread as science finds more definitive links between genes and diseases. Genetic screens already have very high sales figures, and these will continue to rise. The market for genetic screens will also be facilitated by new discoveries and specialisation. Niche markets are very likely to develop in the genetics tests arena.

Diabetes/glucose tests will also grow significantly. Diabetes rates have already reached epidemic proportions, according to the World Health Organization, and rates will continue to rise as diagnostic tests become more common in under-diagnosed regions.

In Vitro Diagnostics: Market Analysis 2009-2024

11 Fertility, Ovulation and Pregnancy Tests

11.1 Market Forecast

Worldwide sales of pregnancy, ovulation, and male and female fertility tests increased at approximately █% over 2007 numbers, reaching approximately █ in 2008. Most such IVD products are sold over-the-counter, although clinics also perform a significant number of diagnostic procedures (including the majority of male fertility assessments). Visiongain forecasts a continued expansion of the market, as people begin to plan their families more carefully and as people continue to delay childbirth into their 30s and 40s.

As shown in Table 11.1 and Figure 11.1, visiongain expects the market for childbirth-related IVD tests to reach █ in 2009, █ in 2014, █ in 2019, and up to █ by 2024. The growth rate for the market will diminish from █% CAGR from 2009-2014 down to █% CAGR between 2019 and 2014, but growth will continue throughout the forecast period.

Table 11.1 Pregnancy and Fertility Tests Forecast, 2009-2024 (\$m)

	2008	2009	2010	2011	2012	2013	2014	2019	2024
Pregnancy / Fertility									
Tests (\$m)	█	█	█	█	█	█	█	█	█
Annual Growth %	█	█	█	█	█	█	█	█	█
CAGR %							█	█	█

Source: visiongain 2009. CAGR values are for 2009-2014, 2014-2019, and 2019-2024.

11.2 Male and Fertility Tests: Relative Sales

Diagnostic tests addressing all aspects of reproduction will continue to sell well, especially in the more developed nations where childbirth is commonly delayed. The majority of the market will be composed of female over the counter tests, although the market for male over the counter tests is increasing as well.

In Vitro Diagnostics: Market Analysis 2009-2024

Figure 11.1 Pregnancy and Fertility Tests Forecast, 2009-2024 (\$m)



Source: visiongain 2009.

Male infertility accounts for at least 40% of infertility problems. Most male fertility tests are performed in clinics, where sperm counts are performed and the sperms' motility and form are assessed. These tests are performed primarily on couples seeking to have a child, and rarely on men who simply want to assess their own fertility. However, over-the-counter male fertility tests have been on the market since 2006, opening the door for this market to expand, visiongain concludes.

Table 11.2 Sales Forecast for Male and Female Fertility Tests, 2009-2024 (\$m)

	2008	2009	2010	2011	2012	2013	2014	2019	2024
Total Fertility Tests (\$m)	█	█	█	█	█	█	█	█	█
Male Fertility (\$m)	█	█	█	█	█	█	█	█	█
Market Share %	█	█	█	█	█	█	█	█	█
Female Fertility (\$m)	█	█	█	█	█	█	█	█	█
Market Share %	█	█	█	█	█	█	█	█	█

Source: visiongain 2009. Sales values are in \$m.