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EXECUTIVE SUMMARY

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Introduction

Summary

Perspective

Growing global incidence of cancer

The impact of unhealthy lifestyles on cancer

Personalized therapy gets closer

Molecularly targeted therapeutics

Move toward rationally designed trials

Accelerate the translation of preclinical research

Strategies toward personal cancer treatment

Near-term market opportunities

New pharmacogenomics, panels and arrays

Driving demand for tests

Drug-diagnostic co-development

Targeted drugs fueling diagnostic growth

Stratifying patients to the best treatment

Trends in cancer diagnostics

Summary

An evolving science

Demonstrating value

Evolving health care practices

Reducing time to market

Addressing regulatory concerns

Changing clinical practice

Diagnostic influences therapeutic molecule discovery

Identifying patient populations

Key platforms

PCR

Nucleic acid testing

Microfluidics

Gene expression profiling

Variety

The role of biomarkers

Prognostic

Predictive

Evaluating therapeutic activity

Challenges and issues

Commercializing theranostics

Regulatory challenges

Technical challenges

DTCs and CTCs

Market developments

Summary

New molecular test for cervical cancer

Detecting high risk types of HPV

License for EGFR lung cancer assay

Licensing agreement extended for prostate cancer biomarker

bioMérieux, GSK develop theranostic for treatment selection
Diagnostic test for pancreatic cancer
Test to select candidates for skin cancer immunotherapy
Collaboration for therapy, companion diagnostic
Companion diagnostics collaboration
Deal to accelerate development of new cancer diagnosis tools
Biomarkers for personalizing radiation cancer treatment
CTC antibodies on a chip track mesothelioma
Body fluid based oncology diagnostics
Highly validated genetic markers for malignant melanoma
Biomarkers for DNA methylation on melanoma tissue
Diagnostic predicts prostate cancer recurrence
Colorectal cancer test approved

Market analysis

Summary

Market drivers

- Improving on prescription by trial and error
- A need for more rapid, specific testing

Opportunities

- Drug-diagnostic combinations
- Rescuing failed drugs
- An unmet need for improving diagnosis

Selected novel products on the market

- HPV and cervical cancer
- Multigene expression testing
- Predicting risk of recurrence
- Gene overexpression
- KRAS mutations
- Molecular classification
- Mutation analysis
- Drug resistance testing
- Measuring exposure to drugs

World market analysis

- Total solutions
- Drug labeling modifications
- Breast cancer
- Colorectal cancer
- Prostate cancer
- Non-small cell lung cancer
- Melanoma
- Renal cancer
- Market by type of diagnostic

Corporate Profiles

Abbott Molecular

- Company description

Agendia

- Company description

Allegro Diagnostics

- Company description

Almac Group

- Company description

AltheaDx

- Company description

Asuragen

Company description
Atossa Genetics
Company description
AutoGenomics
Company description
Becton, Dickinson and Company
Company description
Biocartis SA
Company description
bioMérieux SA
Company description
Caris Life Sciences
Company description
CCC Diagnostics LLC
Company description
Cytocell Ltd.
Company description
Dako Denmark
Company description
deCODE genetics
Company description
Epigenomics AG
Company description
Exosome Diagnostics
Company description
Foundation Medicine
Company description
GE Healthcare
Company description
Gene Express
Company description
Genomic Health
Company description
Gen-Probe
Company description
Illumina
Company description
IncellDx
Company description
Innogenetics NV
Company description
InterGenetics
Company description
Ipsogen
Company description
Kreatech Diagnostics
Company description
MDxHealth
Company description
Myriad Genetics
Company description
Nanosphere
Company description
Oncohealth

On-Q-ity	Company description
Orion Genomics	Company description
Pathwork Diagnostics	Company description
Predictive Biosciences	Company description
Prometheus Laboratories	Company description
Qiagen	Company description
QuantaLife	Company description
Roche Molecular Diagnostics	Company description
Rosetta Genomics	Company description
Transgene	Company description
TrimGen	Company description
TrovaGene	Company description
Veridex	Company description

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