The technological advances in tests used to monitor therapeutic drugs, increased knowledge of pharmacogenetics and pharmacokinetics of drugs, need for better healthcare in developing countries, and rising prevalence of psychiatric diseases and cancer are the major drivers for the therapeutic drug monitoring market.

Adjunct technologies such as biomarker identification using proteomics to accurately identify clinical outcome and genetic testing are expected to benefit the growth of the market. However, high infrastructure costs and dearth of skilled resources may restrain the market growth.

The therapeutic drug monitoring market is broadly segmented by product, technology, class of drug, end user, and region. On the basis of product, the market is divided into consumables and equipment. The equipment is further segmented into immunoassay analyzers, proteomic equipment and other equipment.

The consumables segment is expected to account for nearly two-thirds of the global market. Immunoassay analyzers are expected to be the fastest-growing segment in the its equipment market. Comparatively low costs of immunoassay analyzers and their ease of use are the primary factors driving the growth of this subsegment.

On the basis of technology, the therapeutic drug monitoring market is categorized into three segments, namely, immunoassays, proteomic technologies, and others. The immunoassays segment is expected to account for the largest share of the its technology market in 2015. Factors such as relatively simple tests and requirement of minimal training to handle the immunoassay analyzers will drive the growth of this segment.

On the basis of class of drug, the therapeutic drug monitoring market is segmented into antiepileptics, antibiotics, immunosuppressants, antiarrhythmic drugs, bronchodilators, psychoactive drugs, and others classes. The antiepileptics segment is estimated to account for the largest share in 2015. By end user, the market is divided in to hospital labs, commercial/private labs, and other end users. The hospital labs segment is estimated to account for the largest share in 2015.

North America is expected to account for more than half the therapeutic drug monitoring market share in 2015. It is the prime market for therapeutic drug monitoring due to the high awareness and acceptance of the benefits of therapeutic drug monitoring and growing healthcare expenditure.

Europe on the other hand is growing at a slower rate as the healthcare sector is recovering from the economic downturn and the healthcare facilities are trying to minimize healthcare delivery costs. Growth in the APAC therapeutic drug monitoring market is comparatively slower due to dearth of skilled healthcare personnel for performing therapeutic drug monitoring tests with minimal errors.

Major players in the therapeutic drug monitoring market include F. Hoffmann-La Roche AG (Switzerland), Siemens Healthcare (Germany), Thermo Fisher Scientific (U.S.), Bio-Rad Laboratories Inc. (U.S.), and Danaher Corporation (U.S.).
1.5 Limitations
1.6 Stakeholders

2 Research Methodology
2.1 Market Size Estimation
2.2 Market Breakdown and Data Triangulation
2.2.1 Key Data From Secondary Sources
2.2.2 Key Data From Primary Sources
2.2.2.1 Key Industry Insights
2.2.3 Assumptions for the Study

3 Executive Summary

4 Premium Insights
4.1 Therapeutic Drug Monitoring: Market Overview
4.3 Geographical Snapshot of the Market, 2015
4.4 Market, By Technology
4.5 Its Equipment Market, By Type

5 Market Overview
5.1 Introduction
5.2 Market Segmentation
5.3 Market Dynamics
5.4 Drivers
5.4.1 Advances in Drug Pharmacokinetics and Pharmacogenetics to Increase the Demand for Therapeutics Drug Monitoring
5.4.2 Use of TDM in Traditional Anticancer Therapies
5.5 Restraints
5.5.1 Lack of Financial Provision for Clinical Interpretation of TDM Results
5.6 Opportunities
5.6.1 Enabling Personalized Medicine Via Therapeutic Drug Monitoring While Reducing Healthcare Costs
5.7 Challenges
5.7.1 Dearth of Skilled Professionals to Perform Tests and Interpret Results

6 Therapeutic Drug Monitoring Market, By Product
6.1 Introduction
6.2 Consumables
6.3 Equipment
6.3.1 Immunoassay Analyzers
6.3.2 Proteomics Equipment
6.3.3 Other Equipment

7 Therapeutic Drug Monitoring Market, By Technology
7.1 Introduction
7.2 Immunoassays
7.2.1 Chemiluminescent Immunoassay (CLIA)
7.2.2 Cloned Enzyme Donor Immunoassay (CEDIA)
7.2.3 Fluorescence Polarization Immunoassay (FPIA)
7.2.4 Particle-Enhanced Turbidimetric-Inhibition Immunoassay (PETININA)
7.3 Proteomic Technologies
7.3.1 Liquid Chromatography/Mass Spectrometry (LC-MS)
7.3.2 Gas Chromatography/Mass Spectrometry (GC-MS)
7.4 Other Technologies

8 Therapeutic Drug Monitoring Market, By Class of Drug
8.1 Introduction
8.2 Antiepileptics
8.3 Antiarrhythmic Drugs
8.4 Immunosuppressants
8.5 Antibiotics
8.6 Bronchodilators
8.7 Psychoactive Drugs
8.8 Other Drug Classes

9 Therapeutic Drug Monitoring Market, By End User
9.1 Introduction
9.2 Hospital Labs
9.3 Commercial/Private Labs
9.4 Other End Users

10 Global Therapeutic Drug Monitoring Market, By Region
10.1 Introduction
10.2 North America
10.2.1 U.S.
10.2.2 Canada
10.3 Europe
10.4 Asia-Pacific
10.5 Rest of the World (RoW)

11 Competitive Landscape
11.1 Overview
11.2 Competitive Situation and Trends
11.2.1 New Product Launches, Product Approvals, and Patents
11.2.2 Acquisitions
11.2.3 Marketing and Promotions
11.2.4 Agreements
11.2.5 Others

12 Company Profiles
(Overview, Financials, Products & Services, Strategy, & Developments)*
12.1 Introduction
12.2 Roche Diagnostics
12.3 Siemens Healthcare
12.4 Thermo Fisher Scientific, Inc.
12.5 Danaher Corporation
12.6 Bio-Rad Laboratories, Inc.
12.7 Abbott Laboratories
12.8 Agilent Technologies
12.9 Biomérieux
12.10 Alere Inc.
12.11 Sekisui Medical Co. Ltd.

*Details on Financials, Product & Services, Strategy, & Developments Might Not Be Captured in Case of Unlisted Companies.

13 Appendix
13.1 Insights of Industry Experts
13.2 Discussion Guide
13.3 Knowledge Store: Marketsandmarkets’ Subscription Portal
13.4 Introducing RT: Real-Time Market Intelligence
13.5 Available Customizations
13.6 Related Reports

List of Tables
Table 1 Global Therapeutic Drug Monitoring Market Size, By Product, 2013-2020 (USD Million)
Table 2 Global Consumables Market Size, By Region, 2013-2020 (USD Million)
Table 3 North America: Consumables Market Size, By Country, 2013-2020 (USD Million)
Table 4 Global Equipment Market Size, By Region, 2013-2020 (USD Million)
Table 5 North America: Equipment Market Size, By Country, 2013-2020 (USD Million)
Table 6 Global Equipment Market Size, By Product, 2013-2020 (USD Million)
Table 7 Global Immunoassay Analyzers Market Size, By Region, 2013-2020 (USD Million)
Table 8 Global Proteomic Technologies Market Size, By Region, 2013-2020 (USD Million)
Table 9 Global Other Equipment Market Size, By Region, 2013-2020 (USD Million)
Table 10 Global Therapeutic Drug Monitoring Market Size, By Technology, 2013-2020 (USD Million)
Table 11 Immunoassays in Market Size, By Region, 2013-2020 (USD Million)
Table 12 Immunoassay in Market Size, By Type, 2013-2020 (USD Million)
Table 13 CLIA in Market Size, By Region, 2013-2020 (USD Million)
Table 14 CEDIA in Market Size, By Region, 2013-2020 (USD Million)
Table 15 FPIA in Market Size, By Region, 2013-2020 (USD Million)
Table 16 PETININA in Market Size, By Region, 2013-2020 (USD Million)
Table 17 Proteomic Technologies in Market Size, By Region, 2013-2020 (USD Million)
Table 18 Proteomic Technologies in Market Size, By Type, 2013-2020 (USD Million)
Table 19 LC-MS in Market Size, By Region, 2013-2020 (USD Million)
Table 20 GC-MS in Market Size, By Region, 2013-2020 (USD Million)
Table 21 Other Technologies Market Size, By Region, 2013-2020 (USD Million)
Table 22 Global Market Size, By Class of Drug, 2013-2020 (USD Million)
Table 23 Global Antiepileptics Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 24 North America: Antiepileptics Monitoring Market Size, By Country, 2013-2020 (USD Million)
Table 25 Global Antiarrhythmic Drugs Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 26 North America: Antiarrhythmic Drugs Monitoring Market Size, By Country, 2013-2020 (USD Million)
Table 27 Global Immunosuppressants Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 28 North America: Immunosuppressants Monitoring Market Size, By Country, 2013-2020 (USD Million)
Table 29 Global Antibiotics Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 30 North America: Antibiotics Monitoring Market Size, By Country, 2013-2020 (USD Million)
Table 31 Global Bronchodilators Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 32 North America: Bronchodilators Monitoring Market Size, By Country, 2013-2020 (USD Million)
Table 33 Global Psychoactive Drugs Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 34 North America: Psychoactive Drugs Monitoring Market Size, By Country, 2013-2020 (USD Million)
Table 35 Other Therapeutic Drug Classes Monitoring Market Size, By Region, 2013-2020 (USD Million)
Table 36 TDM Market Size, By End User, 2013-2020 (USD Million)
Table 37 TDM Market Size for Hospital Labs, By Region, 2013-2020 (USD Million)
Table 38 TDM Market Size for Commercial/Private Labs, By Region, 2013-2020 (USD Million)
Table 39 TDM Market Size for Other End Users, By Region, 2013-2020 (USD Million)
Table 40 Market Size, By Region, 2013-2020 (USD Million)
Table 41 North America: Market Size, By Product, 2013-2020 (USD Million)
Table 42 North America: Equipment Market Size, By Type, 2013-2020 (USD Million)
Table 43 North America: Market Size, By Technology, 2013-2020 (USD Million)
Table 44 North America: Market Size for Immunoassays, By Type, 2013-2020 (USD Million)
Table 45 North America: Market Size for Proteomics, By Type, 2013-2020 (USD Million)
Table 46 North America: Market Size, By Class of Drug, 2013-2020 (USD Million)
Table 47 North America: Market Size, By End User, 2013-2020 (USD Million)
Table 48 U.S.: Market Size, By Product, 2013—2020 (USD Million)
Table 49 U.S.: Equipment Market Size, By Type, 2013-2020 (USD Million)
Table 50 U.S.: Market Size, By Technology, 2013-2020 (USD Million)
Table 51 U.S.: Market Size for Immunoassays, By Type, 2013-2020 (USD Million)
Table 52 U.S.: Market Size for Proteomics, By Type, 2013-2020 (USD Million)
Table 53 U.S.: Market Size, By Class of Drug, 2013-2020 (USD Million)
Table 54 U.S.: Market Size, By End User, 2013-2020 (USD Million)
Table 55 Canada: Market Size, By Product, 2013-2020 (USD Million)
Table 56 Canada: Equipment Market Size, By Type, 2013-2020 (USD Million)
Table 57 Canada: Market Size, By Technology, 2013-2020 (USD Million)
Table 58 Canada: Market Size for Immunoassays, By Type, 2013-2020 (USD Million)
Table 59 Canada: Market Size for Proteomics, By Type, 2013-2020 (USD Million)
Table 60 Canada: Market Size, By Class of Drug, 2013-2020 (USD Million)
Table 61 Canada: Market Size, By End User, 2013-2020 (USD Million)
Table 62 Europe: Market Size, By Product, 2013-2020 (USD Million)
Table 63 Europe: Equipment Market Size, By Type, 2013-2020 (USD Million)
Table 64 Europe: Market Size, By Technology, 2013-2020 (USD Million)
Table 65 Europe: Market Size for Immunoassays, By Type, 2013-2020 (USD Million)
Table 66 Europe: Market Size for Proteomics, By Type, 2013-2020 (USD Million)
Table 67 Europe: Market Size, By Class of Drug, 2013-2020 (USD Million)
Table 68 Europe: Market Size, By End User, 2013-2020 (USD Million)
Table 69 APAC: Market Size, By Product, 2013-2020 (USD Million)
Table 70 APAC: Equipment Market Size, By Type, 2013-2020 (USD Million)
Table 71 APAC: Market Size, By Technology, 2013-2020 (USD Million)
Table 72 APAC: Market Size, By End User, 2013-2020 (USD Million)
Table 73 RoW: Market Size, By Product, 2013-2020 (USD Million)
Table 74 RoW: Market Size, By Technology, 2013-2020 (USD Million)
Table 75 RoW: Market Size, By End User, 2013-2020 (USD Million)
Table 76 New Product Launches, Product Approvals, and Patents, 2012-2015
Table 77 Acquisitions, 2012-2015
Table 78 Marketing and Promotions, 2012-2015
Table 79 Agreements, 2012-2015
Table 80 Other Developments, 2012-2015

List of Figures

Figure 1 Research Design: Therapeutic Drug Monitoring Market
Figure 2 Market Size Estimation
Figure 3 Breakdown of Primary Interviews: By Company Type, Designation, and Region
Figure 4 Data Triangulation Methodology
Figure 5 Market Snapshot (2015 vs 2020)
Figure 6 Consumables Account for A Major Share of the Market in 2015
Figure 7 Chemiluminiscent Assays (CLIA) to Dominate the Market During the Forecast Period
Figure 8 Antiepileptics to Witness the Highest Growth Rate in the Market for Class of Drug From 2015 to 2020
Figure 9 Hospital Laboratories to Dominate the Market in the Forecast Period
Figure 10 Geographical Snapshot of the Market, 2015
Figure 11 Rising Focus on Pharmacogenetic Testing is Driving Growth in the Therapeutic Drug Monitoring Market
Figure 12 Antiepileptics Segment to Account for the Largest Share in 2015
Figure 13 North America Will Be the Fastest-Growing Market From 2015 to 2020
Figure 14 Immunoassays Segment to Witness the Highest Growth Rate From 2015 to 2020
Figure 15 Immunoassay Analyzers to Dominate the Equipment Market in 2015
Figure 16 Market Segmentation
Figure 17 Global Market: Drivers, Restraints, Opportunities, and Challenges
Figure 18 The Consumables Segment Will Dominate the Products Market During the Forecast Period (2015-2020)
Figure 19 North America to Contribute to More Than Half of the Consumables Market in the Forecast Period
Figure 20 Immunoassay Analyzers to Witness Highest Growth in the Equipment Market From 2015 to 2020
Figure 21 Market Segmentation, By Technology
Figure 22 Immunoassays Segment is Projected to Grow at the Highest CAGR During the Forecast Period
Figure 23 CLIA is Expected to Dominate the Global Immunoassays in Market in 2015
Figure 24 North America is Expected to Account for the Largest Share of the CLIA in Therapeutic Drug Monitoring Market During the Forecast Period
Figure 25 LC-MS to Dominate the Proteomic Technologies in Therapeutic Drug Monitoring Market From 2015 to 2020
Figure 26 North America is Expected to Grow at A Higher CAGR in the LC-MS in Therapeutic Drug Monitoring Market During the Forecast Period
Figure 27 Antiepileptics to Dominate the Therapeutic Drug Monitoring Market During the Forecast Period
Figure 28 North America is Expected to Account for the Largest Share of the Antiepileptics Monitoring Market in 2015
Figure 29 U.S. to Witness the Highest Growth in the Antiarrhythmic Drugs Monitoring Market in North America
Figure 30 North America is Expected to Witness the Highest Growth in the Immunosuppressants Monitoring Market During the Forecast Period
Figure 31 North America to Account for More Than Half the Global Antibiotics Monitoring Market in 2015
Figure 32 Hospital Labs to Dominate the Market, By End User
Figure 33 North America Holds Largest Share of the Hospital Labs End-User Segment
Figure 34 North America Expected to Grow at the Fastest Rate in the Commercial/Private Labs Segment
Figure 35 North America to Lead the Market for Other End Users
Figure 36 Geographic Snapshot (2015): North America Will Be the Fastest-Growing Region By 2020
Figure 37 North America, an Attractive Destination for the Market
Figure 38 North America Therapeutic Drug Market Snapshot
Figure 39 Immunoassay Analyzers Estimated to Dominate the North America Equipment Market in 2015
Figure 40 CLIA Estimated to Be the Fastest-Growing Segment in the U.S. Therapeutic Drug Monitoring Market for Immunoassays
Figure 41 Europe Therapeutic Drug Market Snapshot
Figure 42 Antiepileptic Drugs to Dominate European Market in 2015
Figure 43 Hospital Laboratories to Account for the Largest Share of the Therapeutic Drug Monitoring Market, By End User, in APAC
Figure 44 Companies Adopted New Product Launches as Their Key Growth Strategy Over the Last Three Years (2013-2016)
Figure 45 Battle for Market Share: New Product Launches, Product Approvals, and Patents—Key Growth Strategy Adopted By Players in the Therapeutic Drug Monitoring Market
Figure 46 Geographic Revenue Mix of the Top Three Market Players
Figure 47 Company Snapshot: Roche Diagnostics
Figure 48 Company Snapshot: Siemens Healthcare
Figure 49 Company Snapshot: Thermo Fisher Scientific, Inc.
Figure 50 Company Snapshot: Danaher Corporation
Figure 51 Company Snapshot: Bio-Rad Laboratories, Inc.
Figure 52 Company Snapshot: Abbott Laboratories
Figure 53 Company Snapshot: Agilent Technologies
Figure 54 Company Snapshot: Biomérieux
Figure 55 Company Snapshot: Alere Inc.

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