

2-3) Trends of infectious disease diagnostics

The market of infectious disease diagnostics is categorized into 6 sub-categories; bacteria test, immunological bacteria test, direct kit, virus antibody, virus antigen and immunological test. The outline of the whole market is described in Appendix 2-5) and an outline of each sub-category market is also given in Appendices 2-6) to 2-13).

Particularly the market for direct kits and virus tests (antibody and antigen) are gathering attention as follows:

1) Direct Kit

Test items are still limited and the market size is not large with annual sales of only 700 million yen. However, the market will be expanding because of such advantages as a short test period and the simplicity of the test. A-streptococcus is a major item. The market will expand further along with increasing number of test items, shortened test period (from 10 min to 3 min) and more use at small hospitals.

2) Virus Tests

Virus tests will continue to be important because they are greatly influential to blood transfusions, transovarial transmissions and STD's. The market is already sizable at 16 billion yen in 1989. Major test items are HBs, ATL (HTLV), AIDS (HIV) and HCV.

New test methods such as DNA probe will be introduced and the market will possibly be changing dramatically in 5-6 years.

Trends in each market are as follows:

Bacteria Test:

Separation culture test, identification test and sensitivity test are major test items holding more than 85% of this market. Major products are biological culture media, simple identification kits and sensitivity discs which together hold approximately 80% of market share.

Immunological Bacteria Test:

While the annual growth rate of identification kits by the immunological method is about 20%, that for the antiserum is only 1% because it is mainly used for type screening of infectious diseases. These trends will continue.

Direct Kit:

The market is expected to expand along with the addition of new test items(now under development) such as mycobacterium tuberculosis, fungus, mycoplasma and campylobacter, the culturing of which is presently time-consuming.