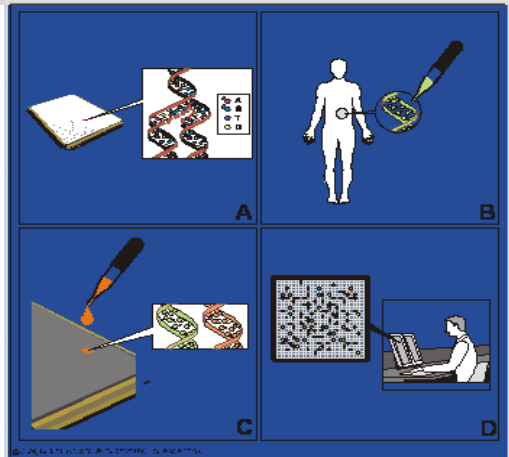


2011-2016

Bio-Detection HLS-HLD: Technologies and Global Market



*Bio-Detection HLS-HLD:
Technologies & Global Market-
2011-2016*

November 2010

Table of Contents

1	Executive Summary	25
1.1	Main Findings	25
1.2	Main Conclusions	31
1.3	Global Bio-Detection Market – 2011-2016	35
1.3.1	Global Systems, Service & Upgrade Markets – 2011-2016	35
1.3.2	Markets by Countries & Regions – 2011-2016	37
1.3.3	Markets by Outdoor, Indoor, Hand-Held and Mobile Lab – 2011-2016	39
1.3.4	Systems Market by Technology Generation – 2011-2016	40
1.3.5	Service & Upgrade Market by Generation – 2011-2016	42
1.4	Business Opportunities	44
1.4.1	Bio-Surveillance, Detection & Bio-forensics Business Challenges – 2011-2016	45
1.5	Technology Outlook	49
2	Introduction	50
2.1	Scope	50
2.2	Who is This Report For?	50
2.3	Methodology	51
2.4	Terms of Reference	54
3	Bio-Terror	56
4	Forty Countries: Bio-Security Status Review	57
4.1	Background	57
4.2	Forty Countries Bio-Technology & Bio-Defense Performance Score	57
5	Bio-Detection Market Drivers	59
6	Bio-Detection Market Inhibitors	61
7	Bio-Detection Industry Competitive Analysis	62
8	Industry SWOT Analysis	63
8.1	Scope	63
8.2	SWOT Analysis	64
9	The Bio-Detection Process	65
9.1	Sampling the Environment	65
9.2	Bio-Detectors in a Multitude of Ambient Settings	66
9.3	Bio-Detection Triggering	66
9.4	Sample Collection	66
9.5	Bio-Particle Detectors	67
9.6	Bio-Agent Identification	68
10	Bio-Detection Technological Challenges	69
10.1	Challenge 1 – Detection of Small Particle Concentration	70

10.2	Challenge 2 – Bio-Background Suppression	71
10.3	Challenge 3 – Expensive Reagents.....	71
10.4	Challenge 4 – Expensive Equipment Maintenance	71
10.5	Challenge 5 – Adapting Equipment to Changing Environments	72
10.6	Challenge 6 – Dealing With Emerging Threats.....	72
11	Present and Pipeline Bio-Detection Technologies.....	73
11.1	Bio-Detection – Core Technologies Comparison.....	73
11.2	Collector/Concentrator Core Technologies.....	76
11.3	Cyclone Collectors.....	76
11.4	Variable Particle-Size Impactor	77
11.5	Virtual Impactors.....	77
11.6	Impingers.....	78
11.7	Reagent-less Trigger Core Technologies	78
11.7.1	Flow Cytometry	79
11.7.2	Particle Sizing	80
11.7.3	Gas Chromatography.....	80
11.7.4	Trigger Technologies – Drivers	81
11.7.5	Trigger Technologies – Inhibitors.....	81
11.8	DNA Based Diagnostic Core Technologies	82
11.8.1	Overview of DNA-Based Detection	82
11.8.2	Polymerase Chain Reaction (PCR).....	83
11.8.3	DNA / RNA Microarrays	87
11.8.4	DNA Technology Drivers.....	89
11.8.5	DNA Technology Inhibitors	89
11.9	Antibody-Antigen Diagnostic Core Technologies.....	89
11.9.1	Overview of Antibody-Antigen Reaction.....	89
11.9.2	Hand-Held Immuno-Chromatographic Assays (HHA).....	90
11.9.3	Magnetic Microbead-Base Assays.....	91
11.9.4	Microfluidic Devices – “Lab on a Chip”	91
11.9.5	Fluorescence Imaging.....	92
11.9.6	Electrochemical-Luminescence (ECL)	92
11.9.7	Antibody/Antigen Technology – Drivers	92
11.9.8	Antibody/Antigen Technology – Inhibitors	92
11.10	Signal Analysis Algorithms	93
11.10.1	Clustering / Classifier Algorithms	93
11.10.2	Image Analysis Algorithms.....	93
11.10.3	Decision Algorithms	93
11.10.4	Drivers.....	93
11.10.5	Inhibitors	94
11.11	Rapid Microbiological Technologies	94
12	Bio- Detection – Analysis by Application.....	96
12.1.1	Application 1 – Emergency Responder Hand-Held Detectors.....	96
12.1.2	Application 2 – Emergency Responder Mobile Labs.....	97
12.1.3	Application 3 – Indoor Standoff Detectors.....	98
12.1.4	Application 4 – Outdoor Standoff Detectors	99

13	Global Bio- Detection Market – 2011-2016	100
13.1	The Global Market Overview	100
13.2	Market by Systems, Upgrade and Service Segments – 2011-2016.....	101
13.3	Global Market by Countries & Regions – 2011-2016.....	103
13.4	Global Systems Market by Technological Generation – 2011-2016.....	106
13.5	Global Systems Market by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2011-2016	109
13.6	Global Service & Upgrade Market – 2011-2016	111
13.6.1	Global Service and Upgrade Business by Technological Generation – 2011-2016	111
13.6.2	Global Service & Upgrade Market by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2011-2016	113
14	US Bio-Detection Market – 2011-2016	116
14.1	US Bio-Defense Background & Analysis	116
14.2	The Obama Administration Bio Terror Mitigation Strategy.....	118
14.3	Biosurveillance Network	119
14.4	Bio-Defense Funding.....	121
14.4.1	Overview	121
14.4.2	DHHS Bio-Defense Missions and Funding	124
14.4.3	DHS Bio-Defense Missions and Funding.....	124
14.4.4	DOD Bio-Defense Missions and Funding.....	125
14.4.5	DOA Bio-Defense Missions and Funding.....	125
14.4.6	EPA Bio-Defense Missions and Funding	125
14.5	Leading Bio-Security Projects.....	126
14.5.1	Project BioWatch	126
14.5.2	Project BioSense	127
14.5.3	Project BioShield.....	128
14.6	Market Drivers	129
14.7	Market Inhibitors	129
14.8	US Bio-Detection Systems Market – 2011-2016	130
14.8.1	Sales by Generation Forecast.....	130
14.8.2	US Bio-Detection Systems Market by Modality Forecast.....	132
14.9	US Outdoor Standoff Bio-Detection Systems Market – 2011-2016	135
14.9.1	Sales Outlook.....	135
14.10	US Indoor Bio-Detection Systems Market – 2011-2016	137
14.10.1	Indoor Market Outlook	138
14.11	US Hand-Held Detection Systems Market – 2011-2016.....	140
14.11.1	Hand-Held Detection Systems Market Outlook.....	140
14.12	US Mobile Bio-Detection Labs Market – 2011-2016.....	142
14.12.1	Market Outlook.....	142
14.13	US Service Business – 2011-2016	144
14.13.1	Service & Upgrade Business by Modality – 2011-2016	144
14.13.2	Service Business by Generation – 2011-2016	145

15	The UK, Germany, France, Italy and Spain HLS-HLD Bio-Detection Market.....	148
15.1	The European Union.....	148
15.1.1	The European Union Bio-Defense Background	148
15.1.2	EU Program of Cooperation on Preparedness and Response to Biological and Chemical Agent Attacks (BICHAT)	151
15.1.3	EU Bio-Defense Research Programs	152
15.2	The UK	153
15.2.1	Bio-Defense Strategy	153
15.2.2	Main Bio-Defense Initiatives.....	155
15.3	Germany.....	156
15.3.1	Bio-Defense Strategy	156
15.3.2	Main Bio-Defense Initiatives.....	157
15.3.3	Bio- Detection R&D Projects	159
15.4	France	162
15.5	Italy.....	163
15.6	Spain	163
15.7	Market Drivers	164
15.8	Market Inhibitors	164
15.9	UK, Germany, France, Italy and Spain Bio-Detection Systems Market – 2011-2016.....	165
15.9.1	Sales by Technology Generations Forecast	165
15.9.2	Sales by Modality Forecast	167
15.10	UK, Germany, France, Italy and Spain Outdoor Standoff Bio-Detection Systems Market Forecast – 2011-2016.....	170
15.10.1	Systems Market Outlook.....	170
15.11	UK, Germany, France, Italy and Spain Indoor Bio-Detection Systems Market – 2011-2016.....	172
15.11.1	Systems Market Outlook.....	173
15.12	UK, Germany, France, Italy and Spain Hand-Held Detection Systems Market – 2011-2016.....	174
15.12.1	Systems Market Outlook.....	175
15.13	UK, Germany, France, Italy and Spain Mobile Bio-Detection Labs Market – 2011-2016.....	177
15.13.1	Market Outlook.....	177
15.14	UK, Germany, France, Italy and Spain Service Business – 2011-2016.....	180
15.14.1	Service & Upgrade Business by Modality – 2011-2016	180
15.14.2	Service Business by Generation – 2011-2016.....	182
16	China, Taiwan, Japan, India and Middle East HLS-HLD Bio-Detection Market.....	185
16.1	Asian Countries Bio- Defense Background.....	185
16.2	Japan.....	185
16.3	China	187
16.4	Taiwan	188

16.5	India.....	189
16.6	Singapore	190
16.7	Middle East.....	191
16.8	Market Drivers	191
16.9	Market Inhibitors	192
16.10	China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market – 2011-2016.....	192
16.10.1	Sales by Technology Generation – 2011-2016.....	192
16.10.2	Market by Modality – 2011-2016.....	194
16.11	China, Taiwan, Japan, India and Middle East Bio-Detection Outdoor Systems Market – 2011-2016.....	196
16.11.1	Sales Outlook.....	196
16.12	China, Taiwan, Japan, India and Middle East Bio-Detection Indoor Systems Market – 2011-2016.....	198
16.12.1	Market Outlook.....	199
16.13	China, Taiwan, Japan, India and Middle East Hand-Held Detection Systems Market – 2011-2016.....	201
16.13.1	Market Outlook.....	201
16.14	China, Taiwan, Japan, India and Middle East Bio-Detection Mobile Labs Market – 2011-2016	203
16.14.1	Market Outlook.....	203
16.15	China, Taiwan, Japan, India and Middle East Service Business – 2011-2016	205
16.15.1	Service & Upgrade Business by Modality – 2011-2016	205
16.15.2	Service Business by Generation – 2011-2016.....	207
17	The Rest of the World HLS-HLD Bio-Detection Market.....	210
17.1	ROW: Bio-Defense Background.....	210
17.1.1	Russia and CIS	210
17.1.2	Russian Government Bio-Security Initiatives	211
17.1.3	International Science and Technology Center (ISTC).....	212
17.1.4	Canada	213
17.1.5	Australia.....	214
17.2	Market Drivers	214
17.3	Market Inhibitors	215
17.4	ROW Bio-Detection Systems Market – 2011-2016.....	215
17.4.1	Sales Forecast by Generation.....	215
17.4.2	Market by Modality Forecast	217
17.5	ROW Outdoor Bio-Detection Systems Market – 2011-2016.....	219
17.5.1	Sales Outlook.....	219
17.6	ROW Indoor Bio-Detection Systems Market – 2011-2016.....	221
17.6.1	Market Outlook.....	221
17.7	ROW Hand-Held Detection Systems Market – 2011-2016.....	223
17.7.1	ROW Market Outlook.....	223
17.8	ROW Mobile Bio-Detection Labs Market – 2011-2016	225
17.8.1	Market Outlook.....	225
17.9	ROW Service Business – 2011-2016	227

17.9.1	ROW Service & Upgrade Business by Modality.....	227
17.9.2	Service Business by Generation – 2011-2016.....	229
18	Bio-Detection Business Opportunities – 2011-2016.....	232
18.1	Historical Perspective: A Market Waiting for Transition	232
18.1.1	The Current and Future HLS Bio-Defense Strategy for Detection.....	232
18.1.2	Factors Affecting Biological Detectors Deployment and Technologies – 2011-2016.....	233
18.1.3	Biological Detection Technology Timeline.....	235
18.2	Business Opportunities for Next Generation HLS Bio-Detection Systems.....	236
18.2.1	Business Opportunity 1 – Emerging Threats.....	236
18.2.2	Business Opportunity 2 – Human Sentinel Surveillance System.....	237
18.2.3	Business Opportunity 3 – Animal Sentinel Surveillance System.....	237
18.2.4	Business Opportunity 4 – Biological IC ³ – Biological Threat Assessment Intelligence Command, Control, and Communication Infrastructure	238
18.2.5	Business Opportunity 5 – Reducing False Alarms – Less False Positives and False Negatives	238
18.2.6	Business Opportunity 6 – Reducing Cost – Minimizing Use of Non-Reusable Reagents	238
18.3	Outdoor Standoff Biological Detectors.....	239
18.3.1	Business Opportunity 7 – Bio-agent Autonomous Networked Detectors (BAND)	239
18.3.2	Business Opportunity 8 – Rapid Automated Biological Identification System (RABIS).....	240
18.3.3	Business Opportunity 9 – First Responder Portable Hand- Held Detector.....	240
18.3.4	Business Opportunity 10 – First-Responder Mobile Biological Detection Station	241
18.3.5	Business Opportunity 11 – Regional Automatic Detector – Outdoor Standoff Detectors	242
18.3.6	Business Opportunity 12 – Networked Automatic Detector – Indoor Standoff Detectors	243
18.3.7	Business Opportunity 13 – External Dissemination of Bio- Agent Detection	243
18.3.8	Business Opportunity 14 – Internal Dissemination of Bio- Agent	244
18.4	Other Bio-Detection Technologies – Business Opportunities	244
18.4.1	Business Opportunity 15 – “Lab on a Chip” – Miniature Detection Devices	244
18.4.2	Business Opportunity 16 – Reagent-less Specific Detection Assays	245

18.4.3	Business Opportunity 17 – Laser-Induced Breakdown Spectroscopy (LIBS)	246
18.4.4	Business Opportunity 18 – Raman Spectroscopy-based Reagent-less Detection.....	246
18.5	Future Technologies and Systems	246
19	Vendors.....	247
19.1	20/20 GeneSystems Inc.	247
19.2	Advnt Biotechnologies	248
19.3	Agilent Technologies	249
19.4	Alexeter Technologies	250
19.5	ANP Technologies, Inc.	251
19.6	BAS - Biological Alarm Systems Ltd. (Israel).....	251
19.7	BD Biosciences Immunocytometry Systems	253
19.8	Bertin Technologies.....	253
19.9	BioDefense Corporation	254
19.10	BioDETECT AS	255
19.11	BioSentinel Pharmaceuticals LLC	256
19.12	3M Microbiology (Biotrace International, Ltd.)	257
19.13	BioTraces, Inc.....	257
19.14	BioVeris Corporation.....	258
19.15	Biral	259
19.16	Cepheid	259
19.17	Commonwealth Biotechnologies, Inc.....	260
19.18	Dycor Technologies Ltd.	260
19.19	Envionics Oy	261
19.20	Evogen, Inc.....	263
19.21	General Dynamics Canada.....	264
19.22	GenPrime, Inc.....	265
19.23	Groton Biosystems	266
19.24	Haztech Systems, Inc.....	267
19.25	Idaho Technology, Inc.	268
19.26	JMAR Technologies, Inc.....	269
19.27	New Horizons Diagnostics.....	270
19.28	Proengin	271
19.29	QTL Biodetection.....	271
19.30	Research International.....	272
19.31	Response Biomedical.....	273
19.32	Roche Applied Science.....	273
19.33	Smiths Detection	274
19.34	Tetracore, Inc.	276
20	Prices of Bio-Detection Equipment	278
21	Appendix A: The Threat of Bio-Terror	281
21.1	Biological Terror	281
21.2	Bio-Weapons – Historical Perspective.....	282
21.3	Biological Terror – Bacterial Agents	284

21.3.1	Anthrax.....	284
21.3.2	Cholera	285
21.3.3	Plague.....	286
21.3.4	Tularemia	287
21.4	Biological Terror – Viral Agents	288
21.4.1	Smallpox	288
21.4.2	Hemorrhagic Fever Viruses	289
21.4.3	Venezuelan Equine Encephalitis.....	291
21.5	Biological Terror – Rickettsiae Agents	292
21.5.1	Q Fever	293
21.5.2	Typhus	293
21.6	Biological Terror – Toxins	294
21.6.1	Botulinum Toxin	294
21.6.2	Ricin	295
21.6.3	Saxitoxin	295
21.6.4	Staphylococcal Enterotoxin B (SEB).....	296
22	Appendix B: Legal Issues.....	297
22.1	International / European Legislation / Agreements	297
22.1.1	The Biological and Toxin Weapons Convention (BTWC) 1972	297
22.2	U.S. Bioterrorism Legislation	302
22.3	The European Treaties & Legislation.....	305
22.3.1	EU Program of Cooperation on Preparedness and Response to Biological and Chemical Agent Attacks (BICHAT)	305

List of Tables

Table 1 – US Federal HLS-HLD Bio-Defense Funding [\$Million] – 2001-2011.....	27
Table 2 – Global HLS Bio-Detection Systems, Service & Upgrade Market Forecast [\$ Million] – 2010-2016	35
Table 3 – Global HLS Bio-Detection Systems, Service & Upgrade Market Forecast by Expenditure Share [%] – 2010-2016	36
Table 4 – Global HLS Bio-Detection (Systems, Service & Upgrade) Market Forecast [\$ Million] by Countries & Regions – 2010-2016.....	37
Table 5 – Global HLS Bio-Detection Systems, Service & Upgrade Market Forecast by Modality [\$ Million] – 2010-2016	39
Table 6 – Global HLS Bio-Detection Systems , Service & Upgrade Market Forecast by Modality Share [%] – 2010-2016.....	39
Table 7 – Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016.....	40
Table 8 – Bio-Detection Systems Market by Generation [%] – 2010-2016.....	41
Table 9 – Bio-Detection Service and Upgrade Business Forecast by Technology Generation [\$ Million] – 2010-2016	42
Table 10 – Bio-Detection Service and Upgrade Business Forecast by Technology Generation Share [%] – 2010-2016.....	43
Table 11 – Bio-surveillance, Detection & Bio-forensics Challenges – 2011-2016.....	45
Table 12 – 40 Countries’ Bio-Defense & Bio-Detection Technologies Performance Rating.....	58
Table 13 – Cost, Speed & Accuracy Comparison of Bio-Detection Technologies	75
Table 14 – Global Bio-Detection Market by Systems, Upgrade and Service Segments [\$Million] – 2010-2016	101
Table 15 – Global HLS Bio-Detection Systems , Service & Upgrade Market Forecast by Expenditure Share [%] – 2010-2016	102
Table 16 – Global HLS Bio-Detection (Systems, Service & Upgrade) Market Forecast [\$ Million] by Countries & Regions – 2010-2016.....	103
Table 17 – Global HLS Bio-Detection (Systems, Service & Upgrade) Market Share [%] by Countries & Regions – 2009-2014	104
Table 18 – Global Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	106
Table 19 – Global Bio-Detection Systems Market by Generation [%] – 2010-2016.....	107
Table 20 – Global Systems Market by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010-2016	109
Table 21 – Global Systems Market Share [%] by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010-2016.....	110

Table 22 – Global Bio-Detection Service and Upgrade Business by Generation [\$ Million] – 2010-2016.....	111
Table 23 – Global Bio-Detection Service and Upgrade Business Forecast by Generation Share [%] – 2010-2016	112
Table 24 – Global Service & Upgrade Market by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010-2016.....	113
Table 25 – Global Service & Upgrade Market Share [%] by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010-2016	114
Table 26 – The CDC Biological Threat Agents Categorization	117
Table 27 - U.S. Federal HLS-HLD Bio-Defense Funding [\$ Million], by Agency – FY2001-FY2011	121
Table 28 – US Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	130
Table 29 – US Bio-Detection Systems Market by Generation Share [%] – 2010-2016	131
Table 30 – US Bio-Detection Market by Modality [\$ Million] – 2010-2016	132
Table 31 – US Bio-Detection Systems Market by Modality Share [%] – 2010-2016	133
Table 32 – US Outdoor Standoff Detectors Systems Market by Generation [\$ Million] – 2010-2016	135
Table 33 – US Outdoor Standoff Detectors Systems Market by Generation Share [%] – 2010-2016.....	136
Table 34 – US Indoor Detectors Systems Market by Generation [\$ Million] – 2010-2016	138
Table 35 – US Indoor Standoff Detectors Systems Market by Technological Generation Share [%] – 2010-2016	139
Table 36 – US Hand-Held Systems Market [\$ Million] by Generation – 2010-2016.....	140
Table 37 – US Hand-Held Systems Market Share [%] by Generation – 2010-2016	141
Table 38 – US Mobile Labs Market by Technology Generation [\$ Million] – 2010-2016	142
Table 39 – US Mobile Labs Market Share [%] by Generation – 2010-2016	143
Table 40 – US Bio-detection Systems Service & Upgrade Business by Modality [\$ Million] – 2010-2016	144
Table 41 – US Bio-Detection Service & Upgrade Business by Modality Share [%] – 2010-2016.....	145
Table 42 – US Bio-Detection Service Business Forecast by Generation [\$ Million] – 2010-2016	145
Table 43 – US Service Business by Generation Share [%] – 2010-2016	146
Table 44 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016.....	165
Table 45 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market Share by Generation [%] – 2010-2016	166
Table 46 – UK, Germany, France, Italy and Spain Bio-Detection Market by Modality [\$ Million] – 2010-2016	167

Table 47 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market by Modality Share [%] – 2010-2016.....	168
Table 48 – UK, Germany, France, Italy and Spain Outdoor Detectors Market by Technology Generation [\$ Million] – 2010-2016.....	170
Table 49 – UK, Germany, France, Italy and Spain Outdoor Detectors Market by Technology Generation Share [%] – 2010-2016.....	171
Table 50 – UK, Germany, France, Italy and Spain Indoor Standoff Detectors Market by Technology Generation [\$ Million] – 2010-2016.....	173
Table 51 – UK, Germany, France, Italy and Spain Indoor Detectors Market by Generation Share [%] – 2010-2016	174
Table 52 – UK, Germany, France, Italy and Spain Hand-Held Systems Market [\$ Million] by Generation – 2010-2016.....	175
Table 53 – UK, Germany, France, Italy and Spain Hand-Held Detection Systems Market Share by Generation [%] – 2010-2016.....	176
Table 54 – UK, Germany, France, Italy and Spain Mobile Labs Market by Generation [\$ Million] – 2010-2016.....	177
Table 55 – UK, Germany, France, Italy and Spain Mobile Labs Market Share [%] by Generation – 2010-2016	179
Table 56 – UK, Germany, France, Italy and Spain Service & Upgrade Business by Modality [\$ Million] – 2010-2016.....	180
Table 57 – UK, Germany, France, Italy and Spain Bio-Detection Service & Upgrade Business Forecast by Modality Share [%] – 2010- 2016.....	181
Table 58 – UK, Germany, France, Italy and Spain Service Business by Generation [\$ Million] – 2010-2016.....	182
Table 59 – UK, Germany, France, Italy and Spain Service Business Forecast by Generation Share [%] – 2010-2016	183
Table 60 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	192
Table 61 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Generation Share [%] – 2010-2016.....	193
Table 62 – China, Taiwan, Japan, India and Middle East Bio-Detection Market by Modality [\$ Million] – 2010-2016	194
Table 63 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Modality Share [%] – 2010-2016.....	195
Table 64 – China, Taiwan, Japan, India and Middle East Outdoor Detectors Market by Generation [\$ Million] – 2010-2016.....	196
Table 65 – China, Taiwan, Japan, India and Middle East Outdoor Detectors Market by Generation Share [%] – 2010-2016	197
Table 66 – China, Taiwan, Japan, India and Middle East Indoor Detectors Market by Generation [\$ Million] – 2010-2016.....	199
Table 67 – China, Taiwan, Japan, India and Middle East Indoor Detectors Market by Generation Share [%] – 2010-2016	200
Table 68 – China, Taiwan, Japan, India and Middle East Hand-Held Detection Systems Market [\$ Million] by Generation – 2010- 2016.....	201

Table 69 – China, Taiwan, Japan, India and Middle East 1st Responder Hand-Held Detection Systems Market by Generation Share [%] – 2010-2016	202
Table 70 – China, Taiwan, Japan, India and Middle East Mobile Labs Market by Generation [\$ Million] – 2010-2016	203
Table 71 – China, Taiwan, Japan, India and Middle East Mobile Labs Market by Generation Share [%] – 2010-2016	204
Table 72 – China, Taiwan, Japan, India and Middle East Bio-Detection Service & Upgrade Business by Modality [\$ Million] – 2010-2016.....	205
Table 73 – China, Taiwan, Japan, India and Middle East Bio-Detection Service & Upgrade Business by Modality Share [%] – 2010-2016.....	206
Table 74 – China, Taiwan, Japan, India and Middle East Service Business by Generation [\$ Million] – 2011-2016	207
Table 75 – China, Taiwan, Japan, India and Middle East Bio-Detection Service Business by Generation Share [%] – 2010-2016	208
Table 76 – ROW Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	215
Table 77 – ROW Bio-Detection Systems Market by Generation Share [%] – 2010-2016	216
Table 78 – ROW Bio-Detection Market by Modality [\$ Million] – 2010-2016	217
Table 79 – ROW Bio-Detection Systems Market by Modality Share [%] – 2010-2016	218
Table 80 – ROW Outdoor Detectors Market by Generation [\$ Million] – 2010-2016	219
Table 81 – ROW Outdoor Detectors Market by Generation Share [%] – 2010-2016	220
Table 82 – ROW Indoor Detectors Market by Generation [\$ Million] – 2010-2016.....	221
Table 83 - ROW Indoor Detectors Market by Generation Share [%] – 2010-2016.....	222
Table 84 – ROW Hand-Held Systems Market [\$ Million] by Generation – 2010-2016	223
Table 85 – ROW Hand-Held Systems Market Share [%] by Generation – 2010-2016	224
Table 86 – ROW Mobile Labs Market by Generation [\$ Million] – 2010-2016	225
Table 87 – ROW First Responder Mobile Labs Market Share [%] by Generation –2010-2016.....	226
Table 88 – ROW Bio-Detection Service & Upgrade Business Forecast by Modality [\$ Million] – 2010-2016	227
Table 89 – ROW Bio-Detection Service & Upgrade Business by Modality Share [%] – 2010-2016.....	228
Table 90 – ROW Service Business by Generation [\$ Million] – 2010-2016	229
Table 91 – ROW Bio-Detection Service Business Forecast by Technology Generation Share [%] – 2010-2016	230

Table 92 – Prices of Bio-Detection Equipment 278

List of Figures

Figure 1 – US Federal Cumulative HLS-HLD Bio-Defense Funding – 2001-2011 [\$Million], by Agency.....	27
Figure 2 – Bio-Detection Strategy – Three Pillars.....	28
Figure 3 – Bio-Detection Modalities.....	29
Figure 4 – Global HLS Bio-Detection Systems, Service & Upgrade Market Forecast [\$ Million] – 2010-2016.....	36
Figure 5 – Global HLS Bio-Detection Systems & Service Market Share [%] – 2010, 2013 & 2016.....	37
Figure 6 – Global Bio-Detection (Systems, Service & Upgrade) Market Forecast [\$ Million] by Countries & Regions – 2010-2016.....	38
Figure 7 – Global HLS Bio-Detection (Systems, Service & Upgrade) Markets Forecast by Modality [\$ Million] – 2010-2016.....	39
Figure 8 – Global HLS Bio-Detection Systems , Service & Upgrade Market Forecast by Modality Share [%] – 2010, 2013 & 2016.....	40
Figure 9 – Global Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016.....	41
Figure 10 – Bio-Detection Systems Market by Generation [%] – 2010, 2013 & 2016.....	42
Figure 11 – Bio-Detection Service Business Forecast by Technology Generation [\$ Million] – 2010-2016.....	43
Figure 12 – Bio-Detection Service and Upgrade Business Forecast by Technology Generation Share [%] – 2010, 2013 & 2016.....	44
Figure 13 – Bio-Detection Industry Competitive Analysis.....	62
Figure 14 – Bio-Detection Industry SWOT Analysis.....	64
Figure 15 – Airborne Bacterial Concentration Fluctuation in a Single Day.....	65
Figure 16 – Cross-Section of Cascade Impactor: PIXE International Corporation.....	67
Figure 17 – TSI's Model 3317 System with Concentrator, GPS Receiver & Wireless Data Radio.....	68
Figure 18 – Comparison in Weight of Pathogens Between BW Agents and CW Agents [mg].....	69
Figure 19 – Typical Point Detection Automated Architecture (With a Combined Trigger/Cue).....	70
Figure 20 – Biological Detection Technologies – 2011-2016.....	74
Figure 21 – Flow Cytometry.....	79
Figure 22 – Gas Chromatography.....	81
Figure 23 – Polymerase Chain Reaction.....	84
Figure 24 – RT-PCR.....	85
Figure 25 – Principles of Real-Time PCR.....	86
Figure 26 – DNA Micro-arrays – Principles of Operation.....	88
Figure 27 – Schematic for Antibody Protein.....	90
Figure 28 – Hand Held Detectors: Alexeter Guardian Reader System and Tetracore Test Strips.....	97
Figure 29 – Roche Applied Science – Light Cycler™ Model 1.2.....	98

Figure 30 – Global Market by Systems, Upgrade & Service Segments – 2010-2016	102
Figure 31 – Global HLS Bio-Detection Systems & Service Market Share [%] – 2010 & 2016	103
Figure 32 – Global Bio-Detection (Systems, Service & Upgrade) Market Forecast [\$ Million] by Countries & Regions – 2010-2016.....	104
Figure 33 – Global Bio-Detection (Systems, Service & Upgrade) Market Share [%] by Countries & Regions – 2010 & 2016	105
Figure 34 – Global Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	107
Figure 35 – Global Bio-Detection Systems Market by Generation [%] – 2010 & 2016	108
Figure 36 – Global Systems Market [\$ Million] by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010-2016.....	110
Figure 37 – Global Systems Market Share [%] by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010 & 2016.....	111
Figure 38 – Global Service & Upgrade Business by Generation [\$ Million] – 2010-2016	112
Figure 39 – Global Bio-Detection Service and Upgrade Business by Generation Share [%] – 2010 & 2016.....	113
Figure 40 – Global Service & Upgrade Market by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010-2016.....	114
Figure 41 – Global Service & Upgrade Market Share [%] by Indoor, Outdoor, Hand-Held and Mobile Labs Segments – 2010 & 2016.....	115
Figure 42 – Bio-Detection Responsibilities across the US Federal Bio-surveillance Network.....	120
Figure 43 – U.S. Government HLS-HLD Bio-Defense Funding [\$ Million] – FY2001-FY2011	122
Figure 44 – Cumulative 2001-2011 Bio-Defense Funding [\$Million], by Agency.....	123
Figure 45 – Bio-Defense Funding Share [%], by Agency – 2001, 2006 & 2011.....	123
Figure 46 – US Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	131
Figure 47 – US Bio-Detection Systems Market by Generation Share [%] – 2010 & 2016	132
Figure 48 – US Bio-Detection Systems Market by Modality [\$ Million] – 2010-2016	133
Figure 49 – US Bio-Detection Systems Market by Modality Share [%] – 2010 & 2016	134
Figure 50 – US Outdoor Systems Standoff Detectors Market by Generation [\$ Million] – 2010-2016	136
Figure 51 – US Outdoor Standoff Detectors Systems Market by Generation Share [%] – 2010 & 2016.....	137

Figure 52 – US Indoor Standoff Detectors Systems Market by Generation [\$ Million] – 2010-2016	138
Figure 53 – US Indoor Standoff Detectors Systems Market by Generation Share [%] – 2010 & 2016.....	139
Figure 54 – US Hand-Held Systems Market [\$ Million] by Generation – 2010-2016	140
Figure 55 – US Hand-Held Systems Market Share [%] by Generation – 2010 & 2016	141
Figure 56 – US Mobile Labs Market by Generation [\$ Million] – 2010-2016.....	142
Figure 57 – US Mobile Labs Market by Generation Share [%] – 2010 & 2016.....	143
Figure 58 – US Bio-Detection Service & Upgrade Business Forecast by Modality [\$ Million] – 2010-2016.....	144
Figure 59 – US Bio-Detection Service & Upgrade Business Forecast by Modality Share [%] – 2010 & 2016	145
Figure 60 – US Service & Upgrade Business Forecast by Generation [\$ Million] – 2010-2016	146
Figure 61 – US Service & Upgrade Business by Generation [%] – 2010 & 2016.....	147
Figure 62 – The EU Counter-Terrorism Strategy	149
Figure 63 – Member States Primary Responsibility	150
Figure 64 – Credit Card-sized Portable Lab (lab-on-a-chip) For Ultra High Speed PCR.....	160
Figure 65 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016.....	166
Figure 66 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market by Generation Share [%] – 2010 & 2016	167
Figure 67 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market by Modality [\$ Million] – 2010-2016	168
Figure 68 – UK, Germany, France, Italy and Spain Bio-Detection Systems Market by Modality Share [%] – 2010 & 2016.....	169
Figure 69 – UK, Germany, France, Italy and Spain Outdoor Detectors Market by Generation [\$ Million] – 2010-2016.....	171
Figure 70 – UK, Germany, France, Italy and Spain Outdoor Detectors Systems Market by Generation Share [%] – 2010 & 2016.....	172
Figure 71 – UK, Germany, France, Italy and Spain Indoor Detectors Market by Generation [\$ Million] – 2010-2016.....	173
Figure 72 – UK, Germany, France, Italy and Spain Indoor Detectors Market by Generation Share [%] – 2010 & 2016	174
Figure 73 – UK, Germany, France, Italy and Spain Hand-Held Detection Systems Market [\$ Million] by Generation – 2010-2016	176
Figure 74 – UK, Germany, France, Italy and Spain Hand-Held Systems Market Share [%] by Generation – 2010 & 2016	177
Figure 75 – UK, Germany, France, Italy and Spain Mobile Labs Market by Generation [\$ Million] – 2010-2016.....	178

Figure 76 – UK, Germany, France, Italy and Spain Mobile Labs Market by Generation Share [%] – 2010 & 2016	179
Figure 77 – UK, Germany, France, Italy and Spain Bio-Detection Service & Upgrade Business Forecast by Modality [\$ Million] – 2010-2016.....	181
Figure 78 – UK, Germany, France, Italy and Spain Bio-Detection Service & Upgrade Business Forecast by Modality Share [%] – 2010 & 2016.....	182
Figure 79 – UK, Germany, France, Italy and Spain Bio-Detection Service & Upgrade Business Forecast by Generation [\$ Million] – 2010-2016.....	183
Figure 80 – UK, Germany, France, Italy and Spain Service & Upgrade Business by Generation [%] – 2010 & 2016	184
Figure 81 – A Bio-attack Decontamination Drill in Japan.....	185
Figure 82 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	193
Figure 83 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Generation Share [%] – 2010 & 2016.....	194
Figure 84 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Modality [\$ Million] – 2010-2016.....	195
Figure 85 – China, Taiwan, Japan, India and Middle East Bio-Detection Systems Market by Modality Share [%] – 2010 & 2016.....	196
Figure 86 – China, Taiwan, Japan, India and Middle East Outdoor Detectors Market by Generation [\$ Million] – 2010-2016	197
Figure 87 – China, Taiwan, Japan, India and Middle East Outdoor Detectors Systems Market by Generation Share [%] – 2010 & 2016.....	198
Figure 88 – China, Taiwan, Japan, India and Middle East Indoor Detectors Market by Generation [\$ Million] – 2010-2016	199
Figure 89 – China, Taiwan, Japan, India and Middle East Indoor Standoff Detectors Market by Generation Share [%] – 2010 & 2016	200
Figure 90 – China, Taiwan, Japan, India and Middle East 1st Responder Hand-Held Detection Systems Market [\$ Million] by Generation – 2010-2016.....	202
Figure 91 – China, Taiwan, Japan, India and Middle East Hand-Held Systems Market Share [%] by Generation – 2010 & 2016.....	203
Figure 92 – China, Taiwan, Japan, India and Middle East Mobile Labs Market by Generation [\$ Million] – 2010-2016	204
Figure 93 – China, Taiwan, Japan, India and Middle East Mobile Labs Market by Generation Share [%] – 2010 & 2016	205
Figure 94 – China, Taiwan, Japan, India and Middle East Bio-Detection Service & Upgrade Business by Modality [\$ Million] – 2010-2016.....	206
Figure 95 – China, Taiwan, Japan, India and Middle East Bio-Detection Service & Upgrade Business by Modality Share [%] – 2010 & 2016.....	207

Figure 96 – China, Taiwan, Japan, India and Middle East Service & Upgrade Business by Generation [\$ Million] – 2010-2016.....	208
Figure 97 – China, Taiwan, Japan, India and Middle East Service & Upgrade Business by Generation [%] – 2010 & 2016	209
Figure 98 – ROW Bio-Detection Systems Market by Generation [\$ Million] – 2010-2016	216
Figure 99 – ROW Bio-Detection Systems Market by Generation Share [%] – 2010 & 2016	217
Figure 100 – ROW Bio-Detection Systems Market by Modality [\$ Million] – 2010-2016	218
Figure 101 – ROW Bio-Detection Systems Market by Modality Share [%] – 2010 & 2016	219
Figure 102 – ROW Outdoor Detectors Market by Generation [\$ Million] – 2010-2016	220
Figure 103 – ROW Outdoor Detectors Market by Generation Share [%] – 2010 & 2016	221
Figure 104 – Indoor Detectors Market by Generation [\$ Million] – 2010-2016.....	222
Figure 105 – ROW Indoor Detectors Market by Generation Share [%] – 2010 & 2016	223
Figure 106 – ROW Hand-Held Systems Market [\$ Million] by Generation – 2010-2016	224
Figure 107 – ROW Hand-Held Systems Market Share [%] by Generation – 2010 & 2016	225
Figure 108 – ROW Mobile Labs Market by Generation [\$ Million] – 2010-2016.....	226
Figure 109 – ROW First Responder Mobile Labs Market by Generation Share [%] – 2010 & 2016.....	227
Figure 110 – ROW Bio-Detection Service & Upgrade Business by Modality [\$ Million] – 2010-2016	228
Figure 111 – ROW Bio-Detection Service & Upgrade Business Forecast by Modality Share [%] – 2010 & 2016	229
Figure 112 – ROW Bio-Detection Service & Upgrade Business Forecast by Generation [\$ Million] – 2010-2016.....	230
Figure 113 – ROW Bio-Detection Service & Upgrade Business Forecast by Generation [%] – 2010 & 2016	231
Figure 114 – Factors Affecting Biological Detection Deployment and Technologies – 2010-2016	234
Figure 115 – Past Bio-Detection Timeline	235
Figure 116 – Civilians in China During the SARS Epidemic	237
Figure 117 – A Typical Microfluidic Device	245
Figure 118 – BAS101 Scheme.	252
Figure 119 – Categories of the Bio-threat Divides	282
Figure 120 – The Spraying of Anthrax from Aum Shinrikyo’s Headquarters June 1993.....	284
Figure 121 – Anthrax Spores and Disease	285
Figure 122 – Cholera Bacteria	286

Figure 123 – Pneumonic Plague – The Disease.....	287
Figure 124 – Tularemia – The Disease.....	287
Figure 125 – Smallpox Virus And Disease	289
Figure 126 – Ebola Virus – Electron Microscopy Image	291
Figure 127 – VEE – Venezuelan Equine Encephalitis Virus in the Olfactory Mucosa of a Mouse	292
Figure 128 – Q Fever.....	293
Figure 129 – Typhus Microbe – Electron Microscopy Image	294
Figure 130 – Castor Plant And Structure For The Ricin Toxin.....	295
Figure 131 – The Dinoflagellate Alexandrium Tamarense And Structure of Saxitoxin	296