

# The U.S. Medical Laboratories Industry

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## Abstracts

This best-selling Marketdata study is a comprehensive analysis of the fragmented but sizeable \$57 billion U.S. clinical lab testing business. The industry was hurt by the recession but is poised for moderate growth to 2013, as the U.S. population ages and new tests are developed. Higher margin esoteric and anatomic pathology tests are pacing growth and the large chains have made a string of acquisitions in this space, to “buy” growth. International expansion could be the next growth frontier.

The study examines, in detail, recent industry trends and developments in the major test segments: PAP tests, workplace drug screening, and esoteric tests. An entire chapter is devoted to the high-growth \$6.6 billion “esoteric” or reference test market—its size, growth, nature, profiles of all key competitors, with revenue rankings.

Complete analysis of independent commercial labs, hospital labs, and physician office labs—how they differ and compete, discussion of major industry trends and demand factors, extensive national/state operating ratios/latest Census and CLIA data. Analysis of industry receipts from 1980-2008 actual, 2009 performance and 2010 outlook, 2013 forecasts, lab staff salaries and vacancy rates, insurance industry testing, latest trade journal survey findings. Estimates and opinions of multiple brokerage firms. Competitor profiles for: Quest Diagnostics, Lab Corp. of America Holdings, Bio-Reference Labs, American Esoteric Labs, Ameripath, ARUP, Genzyme, Medtox Scientific, Clinical Pathology Labs, Mayo Medical Labs, Spectrum Lab Network, Sonora Quest Labs, and more. Contains reference directory of industry sources, list of NIDA-certified drug test labs. This study contains 113 tables and charts, and is also sold by chapters. It is available via several commercial databases as well.

## Contents

### **INTRODUCTION: REPORT SCOPE & METHODOLOGY**

### **EXECUTIVE OVERVIEW OF THE INDUSTRY: MAJOR FINDINGS**

Nature & Characteristics of The Industry: Discussion of industry characteristics, influence of government agencies, routine vs. esoteric tests, in-hospital, commercial and physician-office labs, how tests are processed, lab facilities (regional labs, sales ports, collecting stations, etc.), industry structure, lab marketing and advertising practices.

Highlights of ALL chapters: Discussion of 2007-2009 key industry trends & developments, discussion of industry consolidation, market size (1993-2008 actual, 2009-2010 estd., 2010-2013 forecasts), share of mkt. by hospitals, commercial labs, POLs, home test mkts., size/outlooks for the major test mkts. (Pap tests, drug tests), nature/size of esoteric test mkt. industry structure & key operating ratios of medical labs, industry profitability. Includes tables, opinions of brokerage analysts, industry consultants, recent legislative developments.

#### **Market Size, Growth, Market Segments**

Discussion of industry size as estimated by: brokerage firm analysts, major lab chains, consulting firms, government sources merits/limitations of each.

Government Census: commercial lab receipts (1980-2008), annual percent changes, analysis

Competitor & brokerage analyst estimates of industry size, comparison, discussion (1999-2007), receipts as % total health care expenditures

Marketdata estimates of industry size: 1993-2008, industry demand factors, effects of recession, forecast for 2009-2013 for lab receipts & healthcare expenditures

Industry receipts by test segment (routine, esoteric, anatomic pathology (1999-2009, 2010-2013 projections, in dollars and as % total industry)

Major test segments, receipts as % of total industry: 1999-2013F

Major test provider share of industry sales: breakdown by: hospital labs, independent commercial labs, physician office labs, other (1999-2009, \$ and % of total, 2013 projections)

### **THE MAJOR LAB TEST MARKETS:**

#### **The Pap Smear Test Market**

Summary of Pap screening, evolution of guidelines from 1990s to date

Analysis of new technologies boosting growth of this segment: Cytoc's ThinPrep test

vs. AutoPap test by Tripath Imaging, DNA Pap test by Digene, etc.

Profiles/descriptions & Revenues of Hologic (Cytoc), Digene, Tripath Imaging-(  
2009/2008 Revenues)

Demographics of users: results of Prevention Index survey (frequency of testing:  
1987-95, demographics), Natl. Health Interview Survey (demographic profile of women  
tested)

Market Size: Marketdata & competitor estimates of no. of tests performed and \$ value,  
historical and current year, growth rate, avg. prices,

Who performs Pap tests?, public vs. private sector (Planned Parenthood tests  
1986-2007

Discussion: Can existing professionals handle the work volume? No. of cytology training  
programs, rebound since 1988, salaries/vacancy rate of cytotechs, daily workload limits,  
recent reforms, discussion of past error rates, poor work/screening practices

## **THE WORKPLACE DRUG TESTING MARKET**

Estimated cost of drug abuse in the U.S. workplace, societal costs

Size/growth rate of testing, no. of tests done, scope of drug testing in U.S. today,  
estimated no. of workers tested, transportation workers (NIDA, trade journals opinions,  
AMA)

Types of drug tests used (urine, blood, hair), shift to hair and saliva analysis discussion  
of new emerging tests, changes in Federal testing planned (SAMHSA)

Trends in drug use: latest 2008 findings of Quest Drug Testing Index (1988-2008),  
decline in amphetamine usage, test positive rate trends

Table: annual positivity rates for U.S. workforce: 1988-2008

Table: positivity rates, by type drug: 2002-2008, by testing reason: 2002-2008

Market size: Marketdata estimates of drug test mkt. \$ value,/growth for 1989-2009,  
demand, outlook to 2013 F-negative effects of a recession and hiring on mkt., reasons  
for flat growth, major competitors involved, avg. test costs

Table: Estd. Revenues of the top 5 drug testing companies: 2004-2008

The home drug test market. Nature of, Mkt. size estimates, Phamatech, First Check  
Testing by the insurance industry: Discussion of Lab One, Clinical Reference Labs,  
Osborn Labs estimated shares of market, mkt. size in \$

Major findings of AMA Drug Testing Survey (2004 is latest): prevalence of testing, by  
corporations, testing of current employees, new hires, test-positive rates, employer  
actions, avg. cost per employee, effectiveness, testing methods used, etc.

## **2004 AMA SURVEY RESULTS: WORKPLACE MEDICAL TESTING, 1997-2003 TRENDS: TABLES FOR TESTING RATES BY COMPANIES FOR NEW**

## **HIRES/CURRENT WORKERS, REASONS FOR DRUG TESTING, HISTORICAL DAT**

The private sector worker privacy issues, court rulings, random testing, state policies  
The public sector DOT/transportation worker testing (regulated industries): labs qualified by SAMHSA, certification requirements  
List: Name, address, phone no. of the 48 labs certified by NIDA for federal testing.  
Competitor Profiles (in-depth descriptions, estd. and actual drug test revenues, etc.) for: Quest Diagnostics, Lab Corp. of America (and LabOne), Medtox Scientific. (2008 revenues)

## **THE ESOTERIC TEST MARKET**

Discussion of what defines esoteric vs. routine tests, no. of labs performing, major trends emerging , discussion of Medicare reimbursement  
Coverage of latest mkt. developments, constraints & positives for growth  
Competitor & brokerage analyst estimates of esoteric vs. routine, other test segments  
Discussion of Genzyme Genetics report re genetic testing mkt. (2001-2005)  
Market size/growth: sources of data (The Dark Report, Lab Industry Report, Genzyme, Marketdata research, estimates), analysis of mkt. \$ size and rationale for estimates.  
Analysis of growth 2000-2009 mkt. size estimate, 2010 & 2013 forecasts.  
Ranking of top companies in the market: 2006 vs. 2009 (Marketdata estimates or actual sales),  
The 7 main classes of esoteric tests (oncology, immunology, toxicology, genetics, hematology, etc.)  
Tables  
Industry receipts, by: routine, anatomic pathology, esoteric: 1999-2013F (\$ and % of total)  
Esoteric tests, by kind: \$ receipts 2003, 2005, 2009 (endocrinology, genetics, immunology, infectious disease, oncology, serology, toxicology)  
Competitor Profiles (address, capabilities, specialties, no. of tests performed, revenues-when available) for: ARUP, American Esoteric Labs/Sonic Healthcare, Bio-Reference Labs, Clinical Pathology Labs, Genzyme, LabCorp of America (Esoterix, Dianon, Viroed, Dynacare), Mayo Medical Labs, Medtox Scientific, Quest Diagnostics (AML, Ameripath, Unilab, LabOne) 2004-2009 revenues.  
Physician-Office Labs  
Discussion of estimated number in U.S., growth/decline, regulations that have cut their share of industry revenues, estd. current share of industry receipts in 2009 effects of CLIA on group practices, historical investigations about overuse of lab tests, conflicts of interest, debates, etc. Brokerage firm estimates.



## Tables

### **TABLES:**

No. of POLs, by lab type (2009 CMS data)  
POLs, by CLIA certification type (2006)  
No. of labs, by type/location of facility (2009 CMS data)  
No. of all labs and POLs, CLIA registered: 1993-2009  
POLs, by application type: 1995-2005  
Annual receipts and avg. receipts per POL: 1999-2006, projected 2007-2013  
Structure & Operating Ratios Of The Commercial Lab Industry  
Discussion of 2007 Census data data available so far, status of reporting & Industry snapshot: 1987-2007, key ratios  
Summary and discussion of key findings: no. of US labs, 1982-2007 20-year industry ratios summary, single vs. multi-unit operations, legal form of organization, ratios by receipts size of company & establishment (lab), top 50 firm's mkt. share levels, geographic analysis/receipts by state (1997 vs. 2002 Census data), financial health/composite industry balance sheet ratios

### **20-YEAR SUMMARY OF INDUSTRY STRUCTURE: 1987-2007**

Medical labs' sources of revenue, by kind: 2006-2008  
Non-employer stats. For 2002, receipts, by legal form of company  
Medical labs, by legal form of organization: 2002, 1997 & 1992 (corporation, individual proprietorship, partnership, etc.)  
Industry concentration ratios: 2002, 1997 & 1992  
Medical labs, by annual receipts size of FIRMS: 2002, 1997 & 1992, (no. of firms, labs, receipts, as % total industry)  
Medical labs, by receipts size of FIRMS (under \$100,000/yr.-\$100+ mill.): 2002, 1997 & 1992, receipts, annual payroll as % receipts, no. of employees)  
Medical labs, by receipts size of ESTABLISHMENTS (under \$10,000/yr.-\$10+ mill.): 2002, 1997 & 1992, receipts, annual payroll as % receipts, no. of employees)  
Labs' ratios (as above) by single vs. multi-unit operations: 2002, 1997 & 1992  
No. of medical labs, by state: 1997 vs. 2002 vs. 2007  
No. and receipts of labs, avg. receipts per lab, by state: 1997 vs. 2002  
Receipts of medical labs, ranked by state (1992, 1997, 2002)  
No. & receipts of non-employer labs, by state: 2007  
Composite financial statement for medical labs as a group-average balance sheet & income statement/key ratios: 2005-2009

Lab Staff Issues: Salaries, Vacancy Rates, Turnover

Results of 2008 ASCP/Lab Medicine Magazine Survey: Discussion of hourly wages and % increases in beginning/avg. pay scales: medical technologists, cytotechs, histologic techs, ML techs, phlebotomists, national data:2000-2005 comparisons.

U.S. Bureau of Labor Statistics data: employment of lab techs/technologists:

2000-2008, no. employed and avg. annual income, 2007-2014 projections

ASCP 2008 Wage & Vacancy survey, major findings

Medical Technologists & Medical Technicians employment & mean income (2000-2008)

Table: Avg. hourly wages, by 12 lab staff positions: 2003, 2005

Table: Vacancy rates, by 12 lab positions: 2000-2008

Table: No. of month to fill vacant positions

Summary of ASCT salary survey, 2008, cytotech vs. other positions, yearly salaries

Table: Hourly salary range, by lab position

Table: Hourly salaries, by region

Table: No. of cytotech vacancies per lab

Table: No. of years in the field, in current position, in current lab.

Medical Lab Observer Magazine 2003-2009 survey highlights:

Summary & discussion of, tables for:

Annual salary, medians: 2003-2009, by 7 job types, staff & supervisory

Annual salary, medians: 2003-2009, by region

Annual salary, medians: 2003-2009, by education

Annual salary, medians: 2003-2009, by years in the field

Discussion of medical lab staff training programs

no. of accredited cytotechnology programs: 1976-2000

grads from accredited programs: 2001-2004, annual increase in workforce

projected yearly increase in medical lab techs 2005 to 2014

Company Profiles The Top Industry Competitors (For most companies below: historical development of firm, kinds of tests performed, 2006-2009 financial performance, 2010 guidance, divisional breakdowns and structure, recent mergers, acquisitions or joint ventures, marketing agreements, company strategies, etc.)

AmeriPath (Quest)

Associated Regional & University Pathologists

Bio-Reference labs

Clinical Pathology Labs (Sonic Healthcare)

Laboratory Corp. of America Holdings

Mayo Medical Laboratories

Quest Diagnostics

Spectrum Laboratory Network

Sonora Quest Laboratories



Reference Directory Of Industry Information Sources (Lab industry trade associations, trade journals, consulting firms, government agencies, special reports and surveys, stock analysts, etc.), address, phone, key contacts



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