

2015-2019 Diagnostic Testing in Ancillary Hospital Locations (ER, OR, ICU) - Supplier Shares, Volume and Sales Forecasts for 300 Tests

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Abstracts

This 973-page report contains 153 tables and provides comprehensive analysis of the diagnostic testing markets outside the main hospital laboratory (ERs, ORs, and ICUs). The report includes analysis of the market dynamics, size, growth, regulatory requirements, technological trends, competitive landscape, and emerging opportunities for instrument and consumable suppliers. We trust, this report will help diagnostic products suppliers develop more effective business, R&D and marketing strategies.

Rationale

The growing economic pressures on hospitals, coupled with advances in diagnostic technologies, intensifying competition among suppliers and physicians, and changing consumer demands are shifting diagnostic testing from hospitals closer to the patient.

Market Segmentation Analysis, Review of the ER, OR and ICU market segments, including their dynamics, trends, structure, size, growth and major suppliers. Five-year test volume and sales forecasts for over 300 chemistry, immunodiagnostic, microbiology, hematology and coagulation procedures by market segment: Emergency Rooms, Operating/Recovery Suites, ICUs/CCUs and test category: Routine and Special Chemistry, Microbiology/Infectious Diseases, Hematology, Flow Cytometry, Coagulation, Immunoproteins, Drugs of Abuse, TDM, Endocrine Function, Tumor Markers Sales and Market Share Analysis, Sales and market shares of major reagent and instrument suppliers.

Current and Emerging Products, Analysis of over 130 diagnostic procedures. Review of leading POC chemistry, immunoassay, hematology and coagulation analyzers, both

currently marketed and those in development, including their operating characteristics, features and selling prices. Technology Review, Emerging technologies and their applications for POC testing. Comprehensive listings of companies developing or marketing POC diagnostic technologies and products, by test. Competitive Assessments, Assessments of major suppliers and emerging market entrants, including their sales, product portfolios, marketing tactics, joint ventures, and new products in R&D. Strategic Recommendations, Specific opportunities for new POC instruments and reagent systems with potentially significant market appeal during the next ten years. Design criteria for POC testing products. Alternative business expansion strategies. Potential market entry barriers and risks.

Methodology

This report is based on a combination of primary and secondary sources of information, including review of recent technical and business publications, manufacturer product literature, industry analyst reports, and VPGMarketResearch's proprietary data files.

Contains 973 pages and 153 tables

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8. Defensive Medicine
9. Quality Control Issues

Worldwide Market and Technology Overview

Major Routine Chemistry Tests

1. Albumin
2. Alkaline Phosphatase
3. ALT/SGPT
4. Ammonia
5. Amylase
6. AST/SGOT
7. Bilirubin
8. Blood Gases
9. Blood Urea Nitrogen (BUN)
10. Calcium
11. Cholesterol
12. Cholinesterase
13. Creatinine
14. Electrolytes
 - a. Carbon Dioxide/Bicarbonate
 - b. Chloride
 - c. Potassium
 - d. Sodium
15. Ferritin
16. Folate/Folic Acid

17. Fructosamine
18. Gamma- Glutamyl Transpeptidase (GGT)
19. Glucose
20. High Density Lipoprotein (HDL)
21. Iron
22. Lactate Dehydrogenase (LDH)
23. Magnesium
24. Phosphorus
25. Protein
26. Triglycerides
27. Troponin
28. Uric Acid
29. Urinalysis
30. Vitamin B12

Infectious Disease Tests

1. AIDS
2. Adenovirus
3. Campylobacter
4. Candida
5. Chlamydia
6. Clostridium Difficile
7. Cytomegalovirus
8. Enteroviruses
9. Epstein- Barr Virus
10. Gonorrhea
11. Helicobacter Pylori
12. Hepatitis
 - a. Hepatitis A
 - b. Hepatitis B
 - c. Hepatitis C
 - d. Hepatitis D
13. Herpes Simplex Virus
14. Human Herpes Virus-6 (HHV-6)
15. Influenza Viruses
16. Legionella
17. Lyme Disease
18. Measles (Rubeola)

19. Meningitis
20. Mononucleosis
21. Mumps
22. Mycoplasma
23. Papillomaviruses
24. Pneumonia
25. Respiratory Syncytial Virus (RSV)
26. Rheumatoid Arthritis
27. Rotavirus (Reovirus)
28. Rubella (German Measles)
29. Salmonellosis
30. Shigellosis
31. Staphylococcus Aureus
32. Streptococci
33. Syphilis

Tumor Markers

1. Alpha- Fetoprotein (AFP)
2. Carcinoembryonic Antigen (CEA)
3. Occult Blood
4. Prostatic Acid Phosphatase (PAP)
5. Prostate- Specific Antigen (PSA)

Major Routine and Special Hematology Tests

1. CBC Analysis
 - a. Hemoglobin Concentration
 - b. Hematocrit Determination
 - c. Red Blood Cell Count
 - d. Platelets

Endocrine Function Tests

1. Cortisol
2. Follicle- Stimulating Hormone (FSH)
3. Gastrin
4. Human Chorionic Gonadotropin (HCG)
5. LH

6. Prolactin
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11. Free T4
12. TBG
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4. Gentamicin
5. Lidocaine
6. Lithium
7. Phenytoin/Dilantin
8. Procainamide
9. Quinidine
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2. Activated Partial Thromboplastin Time (APTT)
3. Alpha- 2 Antiplasmin
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5. Bleeding Time
6. D- Dimer
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9. Fibrinogen
10. Heparin
11. Proteins C and S
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13. Thrombin Time

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6. Cannabinoids/Marijuana
7. Cocaine
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9. Methadone
10. Methaqualone
11. Opiates
12. Phencyclidine

Instrumentation

1. Chemistry Analyzers Manufactured by:

Abaxis
Abbott
Alfa Wassermann
Awareness Technologies
Beckman Coulter/Danaher
bioMeriuex
Carolina Chemistries
Horiba
Inverness
Medica
Nova Biomedical
Ortho- Clinical Diagnostics
Polimedco
Randox
Roche

2. Hematology Analyzers Manufactured by:

Abbott
Becton Dickinson
Beckman Coulter/Danaher
Biocode
Drew- Scientific
Diesse Ves Matic
Horiba
Menarini
Nihon Kohden
Polymedco
Sysmex

3. Coagulation Analyzers Manufactured by:

Behnk Elektronik
Bio/Data
Cardiovascular Diagnostics
Diagnostica Stago
Helena Laboratories
Instrumentation Laboratory
ITC Hemochron
Roche
Siemens
Sysmex
Teco Medical Instruments
Trinity Biotech

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 - Time- Resolved Pulse Fluorescence

- d. Luminescence
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- f. Immunoprecipitation
- 3. Dry Chemistry
- 4. Biosensors
- 5. IT and Automation
- 6. Molecular Diagnostics
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 - Ligase Chain Reaction
 - Branched DNA
 - Q- Beta Replicase
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- 1. Business Environment
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 - b. Cost Consciousness
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 - d. Industry Consolidation
 - e. Managed Care
 - PPO
 - HMO
 - f. Hospitals
 - g. Admissions
 - h. Length of Stay
 - i. Industry Diversification
 - j. Physician Demographics
 - k. Aging Population
 - More Chronic Illness
 - Disease Incidence
 - Susceptibility to iatrogenesis

Multiple Illnesses Cases

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 - a. Market Summary
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- A. Routine and Special Chemistry
- B. Microbiology/Infectious Diseases
- C. Hematology and Flow Cytometry
- D. Coagulation

Design Criteria for Decentralized Testing Products

Alternative Market Penetration Strategies

- A. Internal Development
- B. Collaborative Arrangements
- C. University Contracts
- D. Distribution Strategies for Decentralized Testing Markets

1. Marketing Approaches
2. Product complexity
3. Customer Preference
4. Established Suppliers
5. Emerging Suppliers
6. Major Types of Distributors
7. Market Segmentation

Potential Market Entry Barriers and Risks

- A. Market Maturity
- B. Cost Containment
- C. Competition
- D. Technological Edge and Limitations
- E. Patent Protection
- F. Regulatory Constraints
- G. Decentralized Testing Market Challenges

Company Profile

Abbott
ADI/America Diagnostica
Agilent Technologies
AxisShield
Beckman Coulter/Danaher
Becton Dickinson
Bio/Data
Biomerieux
BioRad
Biosite/Inverness/Alere
Cepheid
ChronoLog
Corgenix
Decode
Diadexus
Diagnocure
Diagnostica Stago/Trinity Biotech
Diamedix
Diasorin

Eiken Chemical
EKF Diagnostics
Fujirebio/Innogenetics
Helena Laboratories
Hologic/GenProbe
Horiba
Instrumentation Laboratory
International Technidyne/Nexus DX
Kreatech
Kyowa Medex
Life Technologies
Lonza
Mackay Life Sciences
Matritech
Nihon Kohden
OrthoClinical Diagnostics
Polartech
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Major Companies Developing or Marketing Phosphorus Tests
Major Companies Developing or Marketing Protein Tests
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Major Companies Developing or Marketing AIDS Tests
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