

# **2015-2019 US Critical Care Diagnostic Testing Market: Ancillary Hospital Locations (ER, OR, ICU) - Competitive Strategies, Supplier Shares, Segment Forecasts, Innovative Technologies, Instrumentation Review**

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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 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 five 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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### INTRODUCTION

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4. Demographic Trends
5. Technological Trends
6. Social Trends
7. Quality of Care
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
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16. Folate/Folic Acid
17. Fructosamine

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  19. Meningitis
  20. Mononucleosis
  21. Mumps
  22. Mycoplasma

- 23. Papillomaviruses
- 24. Pneumonia
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- 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
- 7. T3
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- 13. TSH

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4. Antithrombin III
5. Bleeding Time
6. D-Dimer
7. Factor VIII
8. Fibrin Degradation Products
9. Fibrinogen
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## 12. Phencyclidine

### Instrumentation

#### 1. Chemistry Analyzers Manufactured by:

Abaxis

Abbott

Alfa Wassermann

Awareness Technologies

Beckman Coulter/Danaher

bioMeriux

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

Current and Emerging Technologies

1. Monoclonal Antibodies

2. Immunoassays

a. Technological Principle

b. Enzyme Immunoassays (EIA)

Overview

ELISA

Dot Immunobinding Assays

Capillary Immunoassays

Particle-Membrane Capture Immunoassay

Enzyme Amplification

c. Fluorescent Immunoassays

Fluorescent Polarization

Time-Resolved Pulse Fluorescence

d. Luminescence

Chemiluminescence

Bioluminescence

e. Latex Agglutination

f. Immunoprecipitation

3. Dry Chemistry

4. Biosensors

5. IT and Automation

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Polymerase Chain Reaction

Ligase Chain Reaction

Branched DNA

Q-Beta Replicase

Strand Displacement Activation

Self-Sustained Sequence Replicase

## **WORLDWIDE BUSINESS ENVIRONMENT**

### **U.S.A.**

*2015-2019 US Critical Care Diagnostic Testing Market: Ancillary Hospital Locations (ER, OR, ICU) - Competitive...*

## Market Overview

1. Business Environment
  - a. Health Care Expenditures
  - b. Cost Consciousness
  - c. Reimbursement
  - d. Industry Consolidation
  - e. Managed Care
    - PPO
    - HMO
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  - j. Physician Demographics
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  - c. Intensive Care Units
2. Emergency Departments
  - a. Market Summary
  - b. Test volume and Sales Forecasts
3. Operating and Recovery Suites
  - a. Market Summary
  - b. Test Volume and Sales Forecasts
4. ICUs/CCUs
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  - b. Test Volume and Sales Forecasts

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Market Shares

## **MAJOR PRODUCT DEVELOPMENT OPPORTUNITIES**

- 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**

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- 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
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  - 7. Market Segmentation

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- 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  
Axis-Shield  
Beckman Coulter/Danaher  
Becton Dickinson  
Bio/Data  
Biomerieux  
Bio-Rad  
Biosite/Inverness/Alere  
Cepheid  
Chrono-Log  
Corgenix  
Decode  
Diadexus  
Diagnocure  
Diagnostics Stago/Trinity Biotech  
Diamedix  
Diasorin  
Eiken Chemical  
EKF Diagnostics  
Fujirebio/Innogenetics  
Helena Laboratories  
Hologic/Gen-Probe  
Horiba  
Instrumentation Laboratory  
International Technidyne/Nexus DX  
Kreatech  
Kyowa Medex  
Life Technologies  
Lonza  
Mackay Life Sciences  
Matritech  
Nihon Kohden  
Ortho-Clinical Diagnostics  
Polartech  
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