

# 2016 New Frontiers in the Point-of-Care/POC Diagnostic Testing Market: Business Challenges, Emerging Technologies, Competitive Landscape

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## Abstracts

'2016 New Frontiers in the Point-of-Care/POC Diagnostic Testing Market' is VPGMarketResearch's new report, which provides comprehensive analysis of the ten POC market segments, including their dynamics, size, growth, regulatory requirements, technological trends, competitive landscape, and emerging opportunities for instrument and consumable suppliers.

## 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 and commercial laboratories closer to the patient.

## Market Segmentation

Review of the ten POC market segments, including their dynamics, trends, structure, size, growth and major suppliers.

Five-year test volume and reagent sales forecasts for over 300 chemistry, immunodiagnostic, microbiology, hematology and coagulation procedures by market segment:

Home/Personal Testing

Physician Offices/Group Practices

Emergency Rooms

Operating/Recovery Suites

ICUs/CCUs

Cancer Clinics

Ambulatory Care Centers

Surgery Centers

Nursing Homes

Birth Centers

and by 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 Tests and Instrumentation

Analysis of over 130 diagnostic procedures.

Review of leading chemistry, immunoassay, hematology and coagulation analyzers market by Abaxis, Abbott, Alfa Wasserman, Awareness Technologies, Beckman Coulter/Danaher, Becton Dickinson, Behnk Elektronik, Biocode, Bio/Data, bioMerieux, Cardiovascular Diagnostics, Carolina Chemistries, Diagnostica Stago, Diesse Ves Matic, Drew-Scientific, Helena Laboratories, Horiba, Instrumentation Laboratory, Inverness, ITC Hemochron, Medica, Menarini, Nihon Kohden, Nova Biomedical, Ortho-Clinical Diagnostics, Polymedco, Randox, Roche, Siemens, Sysmex, Teco Medical Instruments, Trinity Biotech, and other suppliers.

## Routine Clinical Chemistry Tests

Albumin, Alkaline Phosphatase, ALT/SGPT, Ammonia, Amylase, AST/SGOT, Bilirubin, Blood Gases, BUN (Blood Urea Nitrogen), Calcium, Cholesterol, Cholinesterase, Creatinine, CK-MB, Electrolytes (Carbon Dioxide/Bicarbonate, Chloride, Potassium, Sodium), Ferritin, Folate/Folic Acid, Fructosamine, GGT, Glucose, HDL, Iron, LDH, Magnesium, Phosphorus, Potassium, Protein, Sodium, Triglycerides, Troponin, Uric Acid, Urinalysis, Vitamin B12.

## Infectious Disease Tests

AIDS/HIV, Adenovirus, Aeromonads, Bartonella, Blastocystis Hominis, Campylobacter, Candida, Chancroid, Chlamydia, Clostridium, Coronavirus, Coxsackievirus, Cryptosporidium, Cyclospora, CMV, E. Coli, Echovirus, Encephalitis, Enterovirus, EBV, Giardia, Gonorrhea, Granuloma Inguinale, Hantavirus, H. Pylori, Hepatitis (A, B, C, D, E), Herpes Simplex Virus, Human Herpes Virus-6 (HHV-6), Influenza, Legionella, Lyme disease, Pymphogranuloma, Malaria, Measles, Meningitis, Mononucleosis, Microsporidium, Mononucleosis, Mumps, Mycoplasma, Polyomaviruses, Parvovirus B19, Pneumonia, Polyomaviruses, Pseudomonas, Rabies, RSV, Rhinovirus, Rheumatoid Arthritis, Rotavirus, Rubella, Salmonellosis, Septicemia, Shigella,

Staphylococci, Streptococci, Syphilis, Toxoplasmosis, Trichomonas, Tuberculosis, Vibrio, West Nile, Yersenia.

### **Tumor Markers**

ACTH, AFP, Beta-2 Microglobulin, CA 15-3/27.29, CA 19-9, CA 125, Calcitonin, Cathepsin, CEA, Chromogranin, Colon-Specific Antigen, Cytokeratins, Estrogen Receptor, Ferritin, Gastrin, HCG, Insulin, Interferons, Interleukins, Lymphocyte Subtyping, Neuron-Specific Enolase, Nucleolar, Occult Blood, Oncogenes, Pancreatic Oncofetal Antigen, Pap Smear, Parathyroid Hormone, Progesterone Receptor, Prostatic Acid Phosphatase, Prostatic Specific Antigen, S-100 Protein, Serotonin, Sialic Acid, Squamous Cell Carcinoma Ag, TDT, Thymidine Kinase, Thyroglobulin, Tissue Polypeptide Antigen, and others.

### **Routine and Special Hematology Tests**

CBC + 5-Part Differential, Manual Differential/Review, Hematocrit (Automated, Manual), Hemoglobin (Automated, Manual), Sedimentation Rate, Reticulocytes, WBC (Automated, Manual), Platelets (Automated, Manual), Bone Marrow Analysis, RBC, Eosinophils and others.

### **Flow Cytometry Tests**

Cell Surface Markers (CD4/CD8/T&B Lymphocytes, CD34, Others), Chemotherapy Monitoring (Leukemia/Lymphoma, Others), HLA Typing, Sperm Analysis, Cell Cycle Kinetics, Cell Function Testing, Chromosomal Abnormalities, Fetal Cell Analysis, Granulocyte Function, Receptor DNA/RNA Analysis, Cell Culturing.

### **Endocrine Function Tests**

Cortisol, Estradiol, FSH, HCG, Gastrin, LH, Progesterone, PTH/IO PTH, Prolactin, T3, T3 Uptake, Free T3, T4, Free T4, TBG, Testosterone, TSH.

### **Therapeutic Drug Monitoring (TDM) Tests**

Amikacin, Carbamazepine, Digoxin, Gentamicin, Lidocaine, Lithium, Methotrexate, Phenobarbital, Phenytoin/Dilatin, NAPA/Procainamide, Quinidine, Theophylline, Tobramycin, Valproic Acid, Vancomycin.

## **Coagulation Tests**

Activated Clotting Time (ACT) (1), Activated Protein C Resistance, Activated PTT (APTT), Alpha 2-Antiplasmin, Antithrombin III, Bleeding Time, D-Dimer, Factor II, Factor V, Factor V Leiden, Factor VII, Factor VIII, Factor IX, Factor Ixa, Factor X (Stuart Factor), Factor Xa, Factor XI, Factor XII, Factor XIII, Fibrin Degradation Products, Fibrinogen, Fletcher Factor/Pre-Kallikrein Factor Activation, Heparin/Anti-Factor Xa, Heparin-Induced Thrombocytopenia, Plasmin, Plasminogen, Plasminogen Activator Inhib., Platelet Function/Aggregation, Protein C, Protein S, Prothrombin Mutation, Prothrombin Time (PT), Reptilase Time, Thrombin Time, Von Willebrand's Factor Fav/Ag, and others.

## **Immunoprotein Tests**

C3, C4, CRP, IgA, IgE Specific, IgE Total, IgG, Immunoglobulins, Protein Electrophoresis, and others.

## **Drugs of Abuse**

Amphetamines, Barbiturates, Benzodiazepines, Cannabinoids/Marijuana, Cocaine, LSD, Methadone, Methaqualone, Opiates, Phencyclidine, Propoxyphene, and others.

## **Technology Review**

Emerging technologies and their applications for POC testing.

Comprehensive listings of companies developing or marketing POC diagnostic technologies and products, by test.

## **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.

## **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.

The companies analyzed in the report include:

Abbott

ADI/American Diagnostica

Agilent Technologies

Alere/Biosite/Inverness

Axis-Shield

Beckman Coulter/Danaher

Becton Dickinson

Bio/Data

Biomerieux

Bio-Rad

Cepheid

Chrono-Log

Corgenix

Decode Genetics

Diadexus

Diagnocure

Diagnostica Stago/Trinity Biotech

Diamedix/Erba

Diasorin

Eiken Chemical

EKF Diagnostics

Fujirebio

Grifols

Helena Laboratories

Hologic/Gen-Probe

Horiba

Instrumentation Laboratory

International Technidyne/Nexus DX

Kreatech/Leica

Kyowa Medex

Lonza

Mackay Life Sciences

Matritech

Nihon Kohden

Ortho-Clinical Diagnostics

Polartechinics

Polymedco

Qiagen

Roche

SDIX

Sequenom

Siemens

Sienco

Sysmex

Takara Bio

ThermoFisher

Tosoh

Wako

Zycare/Alere

## **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 1,230 pages and 343 tables



## Contents

### INTRODUCTION

### EXECUTIVE SUMMARY

### RATIONALE FOR TESTING DECENTRALIZATION

1. Overview
2. Regulatory Trends
3. Economic Trends
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

- A. 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
7. T3
8. T3 Uptake
9. Free T3
10. Thyroxine (T4)
11. Free T4
12. TBG
13. TSH

## **THERAPEUTIC DRUG MONITORING (TDM)**

1. Overview
2. Carbamazepine
3. Digoxin
4. Gentamicin
5. Lidocaine
6. Lithium
7. Phenytoin/Dilantin
8. Procainamide
9. Quinidine
10. Theophylline
11. Valproic Acid

## **COAGULATION TESTS**

1. Introduction
2. Activated Partial Thromboplastin Time (APTT)
3. Alpha-2 Antiplasmin
4. Antithrombin III
5. Bleeding Time
6. D-Dimer
7. Factor VIII
8. Fibrin Degradation Products
9. Fibrinogen
10. Heparin
11. Proteins C and S
12. Prothrombin Time (PT)

### 13. Thrombin Time

## **IMMUNOPROTEIN TESTS**

1. CRP
2. Immunoglobulins

## **DRUGS OF ABUSE**

1. Overview
2. Test Methodologies
3. Amphetamines
4. Barbiturates
5. Benzodiazepines
6. Cannabinoids/Marijuana
7. Cocaine
8. Lysergic Acid Diethylamide (LSD)
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

## **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
- 6. Molecular Diagnostics
  - a. Technology Overview
  - b. Amplification Methods
    - Polymerase Chain Reaction
    - Ligase Chain Reaction
    - Branched DNA
    - Q-Beta Replicase
    - Strand Displacement Activation
    - Self-Sustained Sequence Replicase

## **WORLDWIDE BUSINESS ENVIRONMENT**

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

- A. Market Overview
  - 1. Business Environment
    - a. Health Care Expenditures
    - b. Cost Consciousness
    - c. Reimbursement
    - 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
- l. Laboratory Regulations
- 2. Market Structure
  - a. Hospitals
  - b. Commercial/Private Laboratories
- B. Personal Testing
  - 1. Glucose Monitoring
    - Market and Technology Overview
    - Invasive Testing
    - Non-Invasive Testing
    - Genetic Testing
  - 2. Pregnancy Tests
  - 3. Occult Blood Tests
  - 4. Market Size and Growth
- C. Physician Offices/Group Practices
  - 1. Market Summary
  - 2. Market Structure
  - 3. Test Volume and Sales Forecasts
- D. Ancillary Hospital Locations
  - 1. Introduction
    - a. Emergency Departments
    - b. Operating Suites
    - 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
    - a. Market Summary
    - b. Test Volume and Sales Forecasts
- E. Cancer Clinics
  - 1. Introduction
  - 2. Market Summary



- 3. Test Volume and Sales Forecasts
- F. Ambulatory Care Centers
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- G. Surgery Centers
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- H. Nursing Homes
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- I. Birth Centers
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- J. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

## **GERMANY**

- A. Market Overview
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

## **SPAIN**

- A. Business Environment
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts

E. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and 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**

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

Sequenom  
Siemens  
Sienco  
Sysmex  
Takara Bio  
ThermoFisher  
Tosoh  
Wako  
Zycare/Alere

## List Of Tables

### LIST OF TABLES

Executive Summary Table I: All Decentralized Testing Markets, Diagnostics Sales Forecasts by Market Segment

Executive Summary Table II: All Decentralized Testing Markets, Reagent Sales Forecasts by Market Segment

Executive Summary Table III: All Decentralized Testing Markets, Instrument Sales Forecasts by Market Segment

Major Companies Developing or Marketing Albumin Tests

Major Companies Developing or Marketing Alkaline Phosphatase Tests

Major Companies Developing or Marketing ALT/SGPT Tests

Major Companies Developing or Marketing Amylase Tests

Major Companies Developing or Marketing AST/SGOT Tests

Major Companies Developing or Marketing Bilirubin Tests

Major Companies Developing or Marketing Blood Gas Analyzers

Major Companies Developing or Marketing BUN Tests

Major Companies Developing or Marketing Calcium Tests

Major Companies Developing or Marketing Cholesterol Tests

Major Companies Developing or Marketing Creatinine Tests

Major Companies Developing or Marketing Electrolyte Tests

Major Companies Developing or Marketing Ferritin Tests

Major Companies Developing or Marketing GGT Tests

Major Companies Developing or Marketing Glucose Tests

Major Companies Developing or Marketing HDL Tests

Major Companies Developing or Marketing Iron Tests

Major Companies Developing or Marketing LDH Tests

Major Companies Developing or Marketing Magnesium Tests

Major Companies Developing or Marketing Phosphorus Tests

Major Companies Developing or Marketing Protein Tests

Major Companies Developing or Marketing Triglycerides Tests

Major Companies Developing or Marketing Uric Acid Tests

Major Companies Developing or Marketing Vitamin B-12/Folate Tests

Major Companies Developing or Marketing AIDS Tests

Major Companies Developing or Marketing Adenovirus Tests

Major Companies Developing or Marketing Campylobacter Tests

Major Companies Developing or Marketing Candida Tests

Major Companies Developing or Marketing CMV Tests

Major Companies Developing or Marketing EBV Tests  
Major Companies Developing or Marketing Gonorrhea Tests  
Major Companies Developing or Marketing Helicobacter Pylori Tests  
Major Companies Developing or Marketing Hepatitis Tests  
Major Companies Developing or Marketing Herpes Tests  
Major Companies Developing or Marketing Influenza Tests  
Major Companies Developing or Marketing Legionella Tests  
Major Companies Developing or Marketing Lyme Disease Tests  
Major Companies Developing or Marketing Measles Tests  
Major Companies Developing or Marketing Meningitis Tests  
Major Companies Developing or Marketing Mononucleosis Tests  
Major Companies Developing or Marketing Mumps Tests  
Major Companies Developing or Marketing Mycoplasma Tests  
Major Companies Developing or Marketing Pneumonia Tests  
Major Companies Developing or Marketing RSV Tests  
Major Companies Developing or Marketing Rotavirus Tests  
Major Companies Developing or Marketing Rubella Tests  
Major Companies Developing or Marketing Salmonella Tests  
Major Companies Developing or Marketing Shigella Tests  
Major Companies Developing or Marketing Streptococci Tests  
Major Companies Developing or Marketing Syphilis Tests  
Major Companies Developing or Marketing AFP Tests  
Major Companies Developing or Marketing CEA Tests  
Major Companies Developing or Marketing Occult Blood Tests  
Major Companies Developing or Marketing Prostatic Acid Phosphatase Tests  
Major Companies Developing or Marketing PSA Tests  
Major Companies Developing or Marketing FSH Tests  
Major Companies Developing or Marketing HCG Tests  
Major Companies Developing or Marketing LH Tests  
Major Companies Developing or Marketing Prolactin Tests  
Major Companies Developing or Marketing T3 Tests  
Major Companies Developing or Marketing T4 Tests  
Major Companies Developing or Marketing TSH Tests  
Major Companies Developing or Marketing TDM Tests  
Major Companies Developing or Marketing Digoxin Tests  
Major Companies Developing or Marketing Lithium Tests  
Major Companies Developing or Marketing Phenytoin/Dilantin Tests  
Major Companies Developing or Marketing Theophylline Tests  
Major Companies Developing or Marketing Valproic Acid Tests

Major Companies Developing or Marketing APTT Tests  
Major Companies Developing or Marketing Alpha-2 Antiplasmin Tests  
Major Companies Developing or Marketing Antithrombin III Tests  
Major Companies Developing or Marketing Bleeding Time Tests  
Major Companies Developing or Marketing D-Dimer Tests  
Major Companies Developing or Marketing Factor Assays Tests  
Major Companies Developing or Marketing Fibrin Degradation Product Tests  
Major Companies Developing or Marketing Fibrinogen Tests  
Major Companies Developing or Marketing Heparin Tests  
Major Companies Developing or Marketing Protein C Tests  
Major Companies Developing or Marketing Protein S Tests  
Major Companies Developing or Marketing PT Tests  
Major Companies Developing or Marketing Thrombin Time Tests  
Major Companies Developing or Marketing CRP Tests  
Major Companies Developing or Marketing Drugs of Abuse Tests  
U.S.A., Personal Testing Total Diagnostic Market Forecast  
U.S.A., Physician Offices/Group Practices Total Diagnostic Sales Forecast by Market Segment  
U.S.A., Physician Offices/Group Practices Reagent Sales Forecast by Market Segment  
U.S.A., Physician Offices/Group Practices Instrument Sales Forecast by Market Segment  
U.S.A., Office-Based Physicians Forecast by Practice Type  
U.S.A., Physician Offices/Group Practices Forecast by Type  
U.S.A., Physician Office/Group Practice Laboratories Forecast by Practice Size  
U.S.A., Physician Offices/Group Practices Routine and Special Chemistry Test Volume Forecast  
U.S.A., Physician Offices Laboratories Major Infectious Disease Test Volume Forecast  
U.S.A., Physician Offices/Group Practice Microbiology Test Volume Forecast by Market Segment  
U.S.A., Physician Offices/Group Practices Routine Hematology Test Volume Forecast  
U.S.A., Physician Offices Laboratories Flow Cytometry and Special Hematology Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Coagulation Test Volume Forecast  
U.S.A., Physician Offices/Group Practices TDM Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Endocrine Function Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Major Tumor Marker Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Immunoprotien Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Drugs of Abuse Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Routine and Special Chemistry Test Volume

Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Microbiology/Infectious Disease Test Volume

Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Hematology and Flow Cytometry Test

Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices TDM Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Endocrine Function Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Tumor Markers Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Immunoprotein Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Drugs of Abuse Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Routine and Special Chemistry Reagent Market Forecast by Test

U.S.A., Physician Offices Laboratories Major Infectious Disease Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Microbiology Reagent Market Forecast by Market Segment

U.S.A., Physician Offices/Group Practices Hematology and Flow Cytometry Consumables Market Forecast

U.S.A., Physician Offices/Group Practices TDM Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Endocrine Function Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Major Tumor Marker Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Coagulation Reagent Market Forecast

U.S.A., Physician Offices/Group Practices Immunoprotein Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Drugs of Abuse Reagent Market Forecast by Test

U.S.A., Ancillary Hospital Locations Estimated Number

U.S.A., Ancillary Hospital Locations Annual Utilization

U.S.A., Hospital Emergency Departments Total Diagnostics Sales Forecast by Market Segment

U.S.A., Hospital Emergency Departments Reagent Sales Forecast by Market Segment

U.S.A., Hospital Emergency Departments Instrument Sales Forecast by Market Segment



U.S.A., Hospital Emergency Departments Routine and Special Chemistry Test Volume Forecast

U.S.A., Hospital Emergency Departments Profiles, Panels and Individual Tests

U.S.A., Hospital Emergency Departments Drugs of Abuse Test Volume Forecast

U.S.A., Hospital Emergency Departments Routine Hematology Test Volume Forecast

U.S.A., Hospital Emergency Departments Coagulation Test Volume Forecast

U.S.A., Hospital Emergency Departments Selected Infectious Disease Test Volume Forecast

U.S.A., Hospital Emergency Departments Routine and Special Chemistry Reagent Market Forecast by Test

U.S.A., Hospital Emergency Departments Drugs of Abuse Reagent Market Forecast by Test

U.S.A., Hospital Emergency Departments Hematology Reagent Market Forecast

U.S.A., Hospital Emergency Departments Coagulation Reagent Market Forecast

U.S.A., Hospital Emergency Departments Selected Infectious Disease Reagent Market Forecast by Test

U.S.A., Hospital Operating and Recovery Suites Total Diagnostics Sales Forecast by Market Segment

U.S.A., Hospital Operating and Recovery Suites Reagent Sales Forecast by Market Segment

U.S.A., Hospital Operating and Recovery Suites Instrument Sales Forecast By Market Segment

U.S.A., Hospital Operating and Recovery Suites Routine and Special Chemistry Reagent Test Volume Forecast

U.S.A., Hospital Operating and Recovery Suites Routine Hematology Test Volume Forecast

U.S.A., Hospital Operating and Recovery Suites Coagulation Test Volume Forecast

U.S.A., Hospital Operating and Recovery Suites Routine and Special Chemistry Reagent Market Forecast by Test

U.S.A., Hospital Operating and Recovery Suites Hematology Reagent Market Forecast

U.S.A., Hospital Operating and Recovery Suites Coagulation Reagent Market Forecast

U.S.A., Hospital ICUs/CCUs Total Diagnostics Sales Forecast by Market Segment

U.S.A., Hospital ICUs/CCUs Reagent Sales Forecast by Market Segment

U.S.A., Hospital ICUs/CCUs Instrument Sales Forecast by Market Segment

U.S.A., Hospital ICUs/CCUs Routine and Special Chemistry Test Volume Forecast

U.S.A., Hospital ICUs/CCUs Routine Hematology Test Volume Forecast

U.S.A., Hospital ICUs/CCUs Coagulation Test Volume Forecast

U.S.A., Hospital ICUs/CCUs Routine and Special Chemistry Reagent Market Forecast by Test

U.S.A., Hospital ICUs/CCUs Hematology Reagent Market Forecast  
U.S.A., Hospital ICUs/CCUs Coagulation Reagent Market Forecast  
U.S.A., Cancer Clinics Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Cancer Clinics Reagent Sales Forecast by Market Segment  
U.S.A., Cancer Clinics Instrument Sales Forecast by Market Segment  
U.S.A., Cancer Clinics Major Tumor Markers Test Volume Forecast  
U.S.A., Cancer Clinics Routine And Special Chemistry Test Volume Forecast  
U.S.A., Cancer Clinics Routine Hematology/Flow Cytometry Test Volume Forecast  
U.S.A., Cancer Clinics Endocrine Function Test Volume Forecast  
U.S.A., Cancer Clinics Coagulation Test Volume Forecast  
U.S.A., Cancer Clinics Major Tumor Marker Sales Forecast by Test  
U.S.A., Cancer Clinics Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Cancer Clinics Hematology And Flow Cytometry Reagent Market Forecast  
U.S.A., Cancer Clinics Endocrine Function Reagent Market Forecast  
U.S.A., Cancer Clinics Coagulation Reagent Market Forecast  
U.S.A., Ambulatory Care Centers Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Ambulatory Care Centers Reagent Sales Forecast by Market Segment  
U.S.A., Ambulatory Care Centers Instrument Sales Forecast by Market Segment  
U.S.A., Ambulatory Care Centers Estimated Number of Facilities and Patient Visits  
U.S.A., Ambulatory Care Centers Most Frequent Diagnoses  
U.S.A., Ambulatory Care Centers Routine and Special Chemistry Test Volume Forecast  
U.S.A., Ambulatory Care Centers Routine Hematology Test Volume Forecast  
U.S.A., Ambulatory Care Centers Microbiology and Serology Test Volume Forecast  
U.S.A., Ambulatory Care Centers Drugs of Abuse Test Volume Forecast  
U.S.A., Ambulatory Care Centers Coagulation Test Volume Forecast  
U.S.A., Ambulatory Care Centers Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Ambulatory Care Centers Drugs of Abuse Reagent Market Forecast by Test  
U.S.A., Ambulatory Care Centers Hematology Reagent Market Forecast  
U.S.A., Ambulatory Care Centers Microbiology and Serology Reagent Market Forecast by Test  
U.S.A., Ambulatory Care Centers Coagulation Reagent Market Forecast  
U.S.A., Surgery Centers Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Surgery Centers Reagent Sales Forecast by Market Segment  
U.S.A., Surgery Centers Instrument Sales Forecast by Market Segment  
U.S.A., Surgery Centers Most Frequently Performed Procedures  
U.S.A., Surgery Centers Routine and Special Chemistry Test Volume Forecast  
U.S.A., Surgery Centers Routine Hematology Test Volume Forecast

U.S.A., Surgery Centers Coagulation Test Volume Forecast  
U.S.A., Surgery Centers Microbiology and Serology Test Volume Forecast  
U.S.A., Surgery Centers Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Surgery Centers Hematology Consumable Market Forecast  
U.S.A., Surgery Centers Coagulation Reagent Market Forecast  
U.S.A., Nursing Homes Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Nursing Homes Reagent Sales Forecast by Market Segment  
U.S.A., Nursing Homes Instrument Sales Forecast by Market Segment  
U.S.A., Nursing Homes Estimated Number of Facilities, Beds and Occupancy Rate  
U.S.A., Nursing Homes Routine and Special Chemistry Test Volume Forecast  
U.S.A., Nursing Homes Coagulation Test Volume Forecast  
U.S.A., Nursing Homes Routine Hematology Test Volume Forecast  
U.S.A., Nursing Homes Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Nursing Homes Coagulation Reagent Market Forecast  
U.S.A., Nursing Homes Hematology Reagent Market Forecast  
U.S.A., Birth Centers Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Birth Centers Reagent Sales Forecast by Market Segment  
U.S.A., Birth Centers Instrument Sales Forecast by Market Segment  
U.S.A., Birth Centers Facilities, Patient Visits, and Births  
U.S.A., Birth Centers Routine and Special Chemistry Test Volume Forecast  
U.S.A., Birth Centers Profiles, Panels and Individual Tests  
U.S.A., Birth Centers Microbiology and Serology Test Volume Forecast  
U.S.A., Birth Centers Coagulation Test Volume Forecast  
U.S.A., Birth Centers Routine Hematology Test Volume Forecast  
U.S.A., Birth Centers Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Birth Centers Microbiology and Serology Testing Market Forecast  
U.S.A., Birth Centers Hematology Reagent Market Forecast  
U.S.A., Birth Centers Coagulation Reagent Market Forecast  
U.S.A., Major Suppliers of Clinical Chemistry Diagnostics Products, Estimated Sales and Market Shares  
U.S.A., Major Suppliers of Clinical Chemistry Reagents, Estimated Market Shares  
U.S.A., Major Suppliers of Clinical Chemistry Analyzers, Estimated Market Shares  
U.S.A., Major Suppliers of Immunodiagnostic Products, Estimated Market Shares  
U.S.A., Major Suppliers of Immunoassay Reagents, Estimated Market Shares  
U.S.A., Major Suppliers of Immunoassay Analyzers, Estimated Market Shares  
U.S.A., AIDS Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Chlamydia Testing Market Estimated Market Shares of Major Suppliers

U.S.A., CMV Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Gonorrhoea Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Helicobacter Pylori Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Hepatitis Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Herpes Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Influenza Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Lyme Disease Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Mononucleosis Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Rubella Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Streptococci Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Syphilis Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., AFP Testing Market By Major Suppliers  
U.S.A., CA 15-3/27-29 Testing Market by Major Suppliers  
U.S.A., CA 19-9 Testing Market by Major Suppliers  
U.S.A., CEA Testing Market by Major Suppliers  
U.S.A., PAP Testing Market by Major Suppliers  
U.S.A., PSA Testing Market by Major Suppliers  
U.S.A., Hematology Analyzers Estimated Placements and Installed Base  
U.S.A., Flow Cytometers Estimated Placements and Installed Base  
U.S.A., Hematology Diagnostics Market Estimated Market Shares of Major Suppliers  
U.S.A., Hematology Instrument Market Estimated Market Shares of Major Suppliers  
U.S.A., Hematology Consumable Market Estimated Market Shares of Major Suppliers  
U.S.A., Flow Cytometry Diagnostics Market Estimated Market Shares of Major Suppliers  
U.S.A., Flow Cytometry Consumable Market Estimated Market Shares of Major Suppliers  
U.S.A., Flow Cytometry Instruments Market Estimated Market Shares of Major Suppliers  
U.S.A., Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares of Major Suppliers  
Germany, Laboratory Performing Diagnostic Tests Forecast by Market Segment  
Germany, Physician Offices/Group Practices Total Diagnostics Sales Forecast by Market Segment  
Germany, Physician Offices/Group Practices Reagent Sales Forecast by Market Segment  
Germany, Physician Offices/Group Practices Instrument Sales Forecast by Market Segment  
Germany, Physician Offices/Group Practices Routine and Special Chemistry Test Volume Forecast

Germany, Physician Offices/Group Practices Endocrine Function Test Volume Forecast  
Germany, Physician Offices/Group Practices Coagulation Test Volume Forecast  
Germany, Physician Offices Laboratories Routine Hematology Test Volume Forecast  
Germany, Physician Offices/Group Practices Major Cancer Diagnostic Test Volume Forecast  
Germany, Physician Offices/Group Practices Immunoprotein Test Volume Forecast  
Germany, Physician Offices/Group Practices TDM Test Volume Forecast  
Germany, Physician Offices/Group Practices Routine Chemistry Reagent Market Forecast  
Germany, Physician Offices/Group Practices Cancer Diagnostics Market Forecast by Test  
Germany, Physician Offices/Group Practices Endocrine Function Diagnostics Market Forecast  
Germany, Physician Offices/Group Practices TDM Reagent Market Forecast  
Germany, Physician Offices/Group Practices Immunoprotein Reagent Market Forecast  
Germany, Physician Offices/Group Practices Drugs of Abuse Reagent Market Forecast  
Germany, Major Suppliers of Clinical Chemistry Diagnostic Products Estimated Market Shares  
Germany, Major Suppliers of Clinical Chemistry Reagent Estimated Market Shares  
Germany, Major Suppliers of Clinical Chemistry Analyzers Estimated Market Shares  
Germany, Major Suppliers of Immunodiagnostic Products Estimated Market Shares  
Germany, Major Suppliers of Immunodiagnostic Reagent Estimated Market Shares  
Germany, Major Suppliers of Immunoassay Analyzers Estimated Market Shares  
Germany, AIDS Testing Market Estimated Market Share of Major Suppliers  
Germany, Gonorrhea Testing Market Estimated Market Share of Major Suppliers  
Germany, Hepatitis Testing Market Estimated Market Share of Major Suppliers  
Germany, Herpes Testing Market Estimated Market Share of Major Suppliers  
Germany, Influenza Testing Market Estimated Market Share of Major Suppliers  
Germany, Mononucleosis Testing Market Estimated Market Share of Major Suppliers  
Germany, Septicemia Testing Market Estimated Market Share of Major Suppliers  
Germany, Streptococci Testing Market Estimated Market Share of Major Suppliers  
Germany, CA 15-3/27-29 Testing Market by Major Supplier  
Germany, CA 19-9 Testing Market by Major Supplier  
Germany, CA 125 Testing Market by Major Supplier  
Germany, CEA Testing Market by Major Supplier  
Germany, PSA Testing Market by Major Supplier  
Germany, Major Hematology Analyzers Estimated Placements and Installed Base  
Germany, Major Flow Cytometers Estimated Placements and Installed Base  
Germany, Hematology Diagnostics Market Shares of Major Suppliers



Germany, Hematology Instrument Market Shares of Major Suppliers  
Germany, Hematology Consumable Market Shares of Major Suppliers  
Germany, Flow Cytometry Diagnostics Market Shares of Major Suppliers  
Germany, Flow Cytometry Instrument Market Shares of Major Suppliers  
Germany, Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares  
Spain, Laboratory Performing Chemistry and Immunoassay Tests Forecast by Market Segment  
Spain, Ambulatory Care Centers Total Diagnostics Sales Forecast by Market Segment  
Spain, Ambulatory Care Centers Reagent Sales Forecast by Market Segment  
Spain, Ambulatory Care Centers Instrument Sales Forecast by Market Segment  
Spain, Ambulatory Care Centers Routine and Special Chemistry Test Volume Forecast  
Spain, Ambulatory Care Centers Routine Hematology Test Volume Forecast  
Spain, Ambulatory Care Centers Coagulation Test Volume Forecast  
Spain, Ambulatory Care Centers Endocrine Function Test Volume Forecast  
Spain, Ambulatory Care Centers Flow Cytometry and Special Hematology Test Volume Forecast  
Spain, Ambulatory Care Centers TDM Test Volume Forecast  
Spain, Ambulatory Care Centers Immunoprotein Test Volume Forecast  
Spain, Ambulatory Care Centers Drugs of Abuse Test Volume Forecast  
Spain, Ambulatory Care Centers Routine and Special Chemistry Reagent Market Forecast  
Spain, Ambulatory Care Centers Endocrine Function Reagent Market Forecast  
Spain, Ambulatory Care Centers TDM Reagent Market Forecast  
Spain, Ambulatory Care Centers Immunoprotein Reagent Market Forecast  
Spain, Ambulatory Care Centers Drugs of Abuse Reagent Market Forecast  
Spain, Major Suppliers of Clinical Chemistry Diagnostic Products Estimated Market Shares  
Spain, Major Suppliers of Immunodiagnostics Products Estimated Market Shares  
Spain, AIDS Testing Market Estimated Market Shares of Major Suppliers  
Spain, Chlamydia Testing Market Estimated Market Shares of Major Suppliers  
Spain, Hepatitis Testing Market Estimated Market Shares of Major Suppliers  
Spain, Herpes Testing Market Estimated Market Shares of Major Suppliers  
Spain, Influenza Testing Market Estimated Market Shares of Major Suppliers  
Spain, Mononucleosis Testing Market Estimated Market Shares of Major Suppliers  
Spain, Rubella Testing Market Estimated Market Shares of Major Suppliers  
Spain, Streptococci Testing Market Estimated Market Shares of Major Suppliers  
Spain, Syphilis Testing Market Estimated Market Shares of Major Suppliers  
Spain, AFP Testing Market by Major Suppliers

Spain, CA 15-3/27.29 Testing Market by Major Suppliers  
Spain, CA 19-9 Testing Market by Major Suppliers  
Spain, CA 125 Testing Market by Major Suppliers  
Spain, CEA Testing Market by Major Suppliers  
Spain, PSA Testing Market by Major Suppliers  
Spain, Major Hematology Analyzers Estimated Placements and Installed Base  
Spain, Major Flow Cytometers Estimated Placements and Installed Base  
Spain, Hematology Diagnostics Market Shares of Major Suppliers  
Spain, Hematology Consumables Market Shares of Major Suppliers  
Spain, Hematology Instrument Market Shares of Major Suppliers  
Spain, Flow Cytometry Diagnostics Market Shares of Major Suppliers  
Spain, Flow Cytometry Consumables Market Shares of Major Suppliers  
Spain, Flow Cytometry Instrument Market Shares of Major Suppliers  
Spain, Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares

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