

2019 Hospital ER, OR and ICU Diagnostic Testing Market: Reagent and Instrument Supplier Shares, Sales Segment Forecasts for 300 Tests, Emerging Technologies, Instrumentation Review, Competitive Landscape, Opportunities for Suppliers

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Abstracts

VPGMarketResearch's new report provides comprehensive analysis of 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 POC market segments, including their dynamics, trends, structure, size, growth and major suppliers.

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

Emergency Rooms

Operating/Recovery Suites

ICUs/CCUs

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.

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.

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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2. Regulatory Trends
3. Economic Trends
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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
 - 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

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

COAGULATION TESTS

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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)
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6. Cannabinoids/Marijuana
7. Cocaine
8. Lysergic Acid Diethylamide (LSD)
9. Methadone
10. Methaqualone
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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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2. Immunoassays

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- b. Enzyme Immunoassays (EIA)
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 - 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.

Market Overview

- 1. Business Environment
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 - 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

- 1. Laboratory Regulations
- 2. Market Structure
 - a. Hospitals
 - b. Commercial/Private Laboratories

Ancillary Hospital Locations

- 1. Introduction
 - a. Emergency Departments
 - b. Operating Suites
 - c. Intensive Care Units
- 2. Emergency Departments
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 - 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

MAJOR SUPPLIERS' INSTRUMENT PLACEMENTS, INSTALLED BASE, CONSUMABLE 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/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
Diagnostica Stago/Trinity Biotech

Diamedix
Diasorin
Eiken Chemical
EKF Diagnostics
Fujirebio/Innogenetics
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
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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
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Major Companies Developing or Marketing Adenovirus Tests
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Major Companies Developing or Marketing EBV Tests
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Hospital ICUs/CCUs Reagent Sales Forecast by Market Segment

ICUs/CCUs Instrument Sales Forecast by Market Segment

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Hospital ICUs/CCUs Routine

Hematology Test Volume Forecast

Hospital ICUs/CCUs Coagulation Test Volume Forecast

Hospital ICUs/CCUs Routine and Special Chemistry Reagent Market Forecast by Test

Hospital ICUs/CCUs Hematology Reagent Market Forecast

Hospital ICUs/CCUs

Coagulation Reagent Market Forecast

Major Suppliers of Clinical Chemistry

Diagnostic Products, Estimated Sales and Market Shares

Major Suppliers of Clinical Chemistry

Reagents, Estimated Sales and Market Shares

Major Suppliers of Clinical Chemistry

Analyzers, Estimated Sales and Market Shares

Major Suppliers of Immunodiagnostic

Products, Estimated Sales and Market Shares

Major Suppliers of Immunoassay

Reagents, Estimated Sales and Market Shares

Major Suppliers of Immunoassay

Analyzers, Estimated Sales and Market Shares

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Hepatitis Testing Market Estimated Market Shares of Major Suppliers

Herpes Testing Market Estimated Market Shares of Major Suppliers

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Lyme Disease Testing Market Estimated Market Shares of Major Suppliers
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Flow Cytometry Instrument Market Estimated Market Shares of Major Suppliers
Major Suppliers of Coagulation
Diagnostic Products, Estimated Market Shares of Major Suppliers

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