

2023 POC Testing Markets: 2022 Supplier Shares, 2022-2027 Volume and Sales Segment Forecasts for Cancer Clinics, Ambulatory Centers, Surgery Centers, Nursing Homes, Birth Centers - Emerging Technologies, Instrumentation Review, Competitive Strategies -

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Abstracts

This report provides a comprehensive analysis of the emerging POC market segments, including their dynamics, size, growth, regulatory requirements, technological trends, competitive landscape, and emerging opportunities for instrument and consumable suppliers. This report will help diagnostic instrument and reagent suppliers develop more effective business, R&D and marketing strategies. The report is available by section, and can be customized to specific information needs and budget.

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 Analysis

- Review of the emerging 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:

- 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 Products

- Analysis of over 130 diagnostic procedures.
- Review of the 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.

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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
 - 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

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

I. Laboratory Regulations

2. Market Structure

a. Hospitals

b. Commercial/Private Laboratories

B. Cancer Clinics

1. Introduction

2. Market Summary

3. Test Volume and Sales Forecasts

C. Ambulatory Care Centers 1. Introduction

2. Market Summary

3. Market Structure

4. Test Volume and Sales Forecasts

D. Surgery Centers

1. Introduction

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E. Nursing Homes

1. Introduction

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F. Birth Centers

1. Introduction

2. Market Summary

3. Market Structure

4. Test Volume and Sales Forecasts

G. 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
Agilent Technologies
Beckman Coulter/Danaher/Cepheid
Becton Dickinson
Bio/Data
bioMerieux
Bio-Rad
Chrono-Log
Corgenix
Decode Genetics
Diamedix

DiaSorin
Eiken Chemical
EKF Diagnostics
Fujifilm Wako
Fujirebio
Grifols
Helena Laboratories
Hologic
Horiba
Instrumentation Laboratory/Werfen
Kyowa Medex
LabCorp
Leica Biosystems
Lonza
Nihon Kohden
Ortho-Clinical Diagnostics
Polymedco
Qiagen
Roche
SDIX
Sekisui Diagnostics
Siemens Healthineers
Sysmex
Takara Bio
Thermo Fisher
Tosoh

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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 Uric Acid Tests
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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

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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
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Major Companies Developing or Marketing Valproic Acid Tests
Major Companies Developing or Marketing APTT Tests
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Surgery Centers Hematology Consumable Market Forecast
Surgery Centers Coagulation Reagent Market Forecast
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Nursing Homes Reagent Sales Forecast by Market Segment
Nursing Homes Instrument Sales Forecast by Market Segment
Nursing Homes Estimated Number of Facilities, Beds and Occupancy Rate
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Nursing Homes Coagulation Test Volume Forecast
Nursing Homes Routine Hematology Test Volume Forecast
Nursing Homes Routine And Special Chemistry Reagent Market Forecast by Test
Nursing Homes Coagulation Reagent Market Forecast
Nursing Homes Hematology Reagent Market Forecast
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Birth Centers Reagent Sales Forecast by Market Segment
Birth Centers Instrument Sales Forecast by Market Segment
Birth Centers Facilities, Patient Visits, and Births
Birth Centers Routine And Special Chemistry Test Volume Forecast
Birth Centers Profiles, Panels and Individual Tests
Birth Centers Microbiology and Serology Test Volume Forecast
Birth Centers Coagulation Test Volume Forecast
Birth Centers Routine Hematology Test Volume Forecast
Birth Centers Routine and Special Chemistry Reagent Market Forecast by Test
Birth Centers Microbiology and Serology Testing Market Forecast
Birth Centers Hematology Reagent Market Forecast
Birth Centers Coagulation Reagent Market Forecast
Major Suppliers of Clinical Chemistry Diagnostics 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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Chlamydia Testing Market Estimated Market Shares of Major Suppliers
CMV Testing Market Estimated Market Shares of Major Suppliers
Gonorrhea Testing Market Estimated Market Shares of Major Suppliers
Helicobacter Pylori Testing Market Estimated Market Shares of Major Suppliers
Hepatitis Testing Market Estimated Market Shares of Major Suppliers
Herpes Testing Market Estimated Market Shares of Major Suppliers
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Rubella Testing Market Estimated Market Shares of Major Suppliers
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Flow Cytometry Consumable Market Estimated Market Shares of Major Suppliers
Flow Cytometry Instruments Market Estimated Market Shares of Major Suppliers
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