

2023 POC Ancillary Hospital Locations (ER, OR, ICU/CCU) Diagnostic Testing Market: 2022 Supplier Shares and 2022-2027 Segment Forecasts by Test, Competitive Intelligence, Emerging Technologies, Instrumentation and Opportunities for Suppliers

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Abstracts

This report 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.

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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)
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6. Prolactin
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9. Free T3
10. Thyroxine (T4)
11. Free T4
12. TBG
13. TSH

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3. Digoxin
4. Gentamicin
5. Lidocaine
6. Lithium
7. Phenytoin/Dilantin
8. Procainamide
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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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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

bioMérieux

Carolina Chemistries

Horiba

Medica

Nova Biomedical

Ortho-Clinical Diagnostics

Polymedco

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

Roche

Siemens Healthineers

Sysmex

Teco Medical Instruments

Trinity Biotech

Current and Emerging Technologies

1. Monoclonal Antibodies

2. Immunoassays

a. Technological Principle

b. Enzyme Immunoassays (EIA)

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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.

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

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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

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

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- 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 Profiles

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

DiaSorin
Eiken Chemical
EKF Diagnostics
Fujifilm Wako
Fujirebio
Grifols
Helena Laboratories
Hologic
Horiba
Instrumentation Laboratory/Werfen
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Labcorp
Leica Biosystems
Lonza
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Diagnostic Products, Estimated Market Shares of Major Suppliers

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