

2023-2027 Critical Care Diagnostics Market in Ancillary Hospital Locations (ER, OR, ICU): 2022 Supplier Shares and Strategies, Instrumentation Review, Emerging Technologies

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Abstracts

This report provides a 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. 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 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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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
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9. Free T3
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5. Lidocaine
6. Lithium
7. Phenytoin/Dilantin
8. Procainamide
9. Quinidine
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11. Valproic Acid

Coagulation Tests

1. Introduction
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4. Antithrombin III
5. Bleeding Time
6. D-Dimer
7. Factor VIII
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9. Fibrinogen
10. Heparin
11. Proteins C and S
12. Prothrombin Time (PT)
13. Thrombin Time

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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
 - 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
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- d. Luminescence
 - ° Chemiluminescence
 - ° Bioluminescence
- e. Latex Agglutination
- f. Immunoprecipitation
- 3. Dry Chemistry
- 4. Biosensors
- 5. IT and Automation
- 6. Molecular Diagnostics
 - a. Technology Overview
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 - ° 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

I. 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

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

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 Profiles

Abbott
Agilent Technologies
Beckman Coulter/Danaher/Cepheid
Becton Dickinson
Bio/Data
bioMerieux
Bio-Rad
Chrono-Log
Corgenix
Decode Genetics
Diagnostics Stago
Diamedix
DiaSorin
Eiken Chemical
EKF Diagnostics
Fujifilm Wako
Fujirebio
Grifols
Helena Laboratories
Hologic
Horiba
Instrumentation Laboratory/Werfen
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Major Companies Developing or Marketing AIDS Tests
Major Companies Developing or Marketing Adenovirus Tests
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Major Companies Developing or Marketing CMV Tests
Major Companies Developing or Marketing EBV Tests
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Major Companies Developing or Marketing Helicobacter Pylori Tests
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