

# **New Frontiers in Physician Office Diagnostic Testing: Business Challenges, Emerging Technologies, Competitive Landscape**

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## **Abstracts**

New Frontiers in Physician Office Diagnostic Testing: Business Challenges, Emerging Technologies, Competitive Landscape is Venture Planning Groups new report, which provides comprehensive analysis of the physician office market segment, including 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 physician office market segment, including 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 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 Soecific, 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/America Diagnostica

Agilent Technologies

Axis-Shield

Beckman Coulter/Danaher

Becton Dickinson

Bio/Data

Biomerieux

Bio-Rad

Biosite/Inverness/Alere

Cepheid

Chrono-Log

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Grifols

Helena Laboratories

Hologic/Gen-Probe

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Mackay Life Sciences

Matritech

Nihon Kohden

Ortho-Clinical Diagnostics

Polartechnics

Polymedco

Qiagen

Roche

SDIX

Sequenom

Siemens

Sienco

Sysmex

Takara Bio

ThermoFisher/Life Technologies

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 Venture Planning Group's proprietary data files.

Contains 970 pages and 152 tables

*New Frontiers in Physician Office Diagnostic Testing: Business Challenges, Emerging Technologies, Competitive...*

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Awareness Technologies  
Beckman Coulter/Danaher  
bioMeriuex  
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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  
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