

# **New Frontiers in US Critical Care (ER, OR, ICU) Diagnostic Testing: Business Challenges, Emerging Technologies, Competitive Landscape**

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## **Abstracts**

New Frontiers in US Critical Care (ER, OR, ICU) Diagnostic Testing: Business Challenges, Emerging Technologies, Competitive Landscape is Venture Planning Groups new report, which 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 over 300 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.

## **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

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

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 973 pages and 153 tables

## Contents

### INTRODUCTION

### RATIONALE FOR TESTING DECENTRALIZATION

1. Overview
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

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### MAJOR ROUTINE CHEMISTRY TESTS

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3. ALT/SGPT
4. Ammonia
5. Amylase
6. AST/SGOT
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  - b. Chloride
  - c. Potassium
  - d. Sodium
15. Ferritin

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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

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15. Influenza Viruses
16. Legionella
17. Lyme Disease



18. Measles (Rubeola)
19. Meningitis
20. Mononucleosis
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32. Streptococci
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## **TUMOR MARKERS**

1. Alpha-Fetoprotein (AFP)
2. Carcinoembryonic Antigen (CEA)
3. Occult Blood
4. Prostatic Acid Phosphatase (PAP)
5. Prostate-Specific Antigen (PSA)

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## **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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## **CURRENT AND EMERGING TECHNOLOGIES**

### **U.S.A.**

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- C. Hematology and Flow Cytometry
- D. Coagulation

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## **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  
Diagnostics 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  
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