

# Succeeding in the 2020 POC Ancillary Hospital Locations (ER, OR, ICU/CCU) Diagnostic Testing Market: Supplier Shares and Segment Forecasts by Test, Competitive Intelligence, Emerging Technologies, Instrumentation and Opportunities for Suppliers

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## Abstracts

This 973-page report contains 153 tables and 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.

Contains 973 pages and 153 tables

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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

#### 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
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  - b. Chloride
  - c. Potassium
  - d. Sodium
15. Ferritin
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18. Gamma-Glutamyl Transpeptidase (GGT)
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22. Lactate Dehydrogenase (LDH)
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24. Phosphorus
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27. Troponin
28. Uric Acid
29. Urinalysis
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#### Infectious Disease Tests

1. AIDS
2. Adenovirus
3. Campylobacter
4. Candida
5. Chlamydia
6. Clostridium Difficile
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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

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5. LH
6. Prolactin
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12. TBG
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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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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

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  - f. Immunoprecipitation
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    - Strand Displacement Activation
    - Self-Sustained Sequence Replicase

## **WORLDWIDE BUSINESS ENVIRONMENT**

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

#### Market Overview

*Succeeding in the 2020 POC Ancillary Hospital Locations (ER, OR, ICU/CCU) Diagnostic Testing Market: Supplier...*

1. Business Environment
    - a. Health Care Expenditures
    - b. Cost Consciousness
    - c. Reimbursement
    - d. Industry Consolidation
    - e. Managed Care
      - PPO
      - HMO
    - f. Hospitals
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    - b. Commercial/Private Laboratories
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1. Introduction
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    - 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
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  - 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  
Accriva  
Agilent Technologies  
Axis-Shield  
Beckman Coulter/Danaher  
Becton Dickinson

Bio/Data  
bioMerieux  
Bio-Rad  
Cepheid  
Chrono-Log  
Corgenix  
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DiaSorin  
Eiken Chemical  
EKF Diagnostics  
Fujirebio  
Grifols  
Helena Laboratories  
Hologic  
Horiba  
Instrumentation Laboratory/Werfen  
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Qiagen  
Roche  
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