

# 2017 US POC/Point-of-Care Diagnostic Testing Market: New Frontiers, Business Challenges, Emerging Technologies, Competitive Landscape

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## Abstracts

VPGMarketResearchs new report provides comprehensive analysis of the ten 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 the ten 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:

Home/Personal Testing

Physician Offices/Group Practices

Emergency Rooms

Operating/Recovery Suites

ICUs/CCUs

Cancer Clinics

Ambulatory Care Centers

Surgery Centers

Nursing Homes

Birth Centers 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.

## 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 Specific, 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

Accriva

ADI/American Diagnostica

Agilent Technologies

Alere/Biosite/Inverness

Axis-Shield

Beckman Coulter/Danaher

Becton Dickinson

Bio/Data

Biomerieux

Bio-Rad

Cepheid

Chrono-Log

Corgenix

Decode Genetics

Diadexus

Diagnocure

Diagnostica Stago/Trinity Biotech

Diamedix/Erba

Diasorin

Eiken Chemical

EKF Diagnostics

Fujirebio

Grifols

Helena Laboratories

Hologic/Gen-Probe

Horiba

Instrumentation Laboratory

Kreatech/Leica

Kyowa Medex

Lonza

Mackay Life Sciences

Matritech

Nihon Kohden

Ortho-Clinical Diagnostics

Polartechnics

Polymedco

Qiagen

Roche

SDIX

Sequenom

Siemens

Sienco

Sysmex

Takara Bio

Thermo Fisher

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 VPGMarketResearch's proprietary data files.



Contains 1,172 pages and 256 tables

## Contents

### INTRODUCTION

### EXECUTIVE SUMMARY

### 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

### WORLDWIDE MARKET AND TECHNOLOGY OVERVIEW

#### a. 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. FOLLATE/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. EPSTEInBARR 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. CARCINOEMBRIONIC 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
7. T3
8. T3 UPTAKE
9. FREE T3
10. THYROXINE (T4)
11. FREE T4
12. TBG
13. TSH

## **THERAPEUTIC DRUG MONITORING (TDM)**

1. OVERVIEW
2. CARBAMAZEPINE
3. DIGOXIN
4. GENTAMICIN
5. LIDOCAINE
6. LITHIUM
7. PHENYTOIN/DILANTIN
8. PROCAINAMIDE
9. QUINIDINE
10. THEOPHYLLINE
11. VALPROIC ACID

## **COAGULATION TESTS**

1. INTRODUCTION
2. ACTIVATED PARTIAL THROMBOPLASTIN TIME (APTT)
3. ALPHA 2 ANTIPLASMIN
4. ANTITHROMBIN III
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)
13. THROMBIN TIME

## **IMMUNOPROTEIN TESTS**

1. CRP
2. IMMUNOGLOBULINS DRUGS OF ABUSE
  1. OVERVIEW
  2. TEST METHODOLOGIES
  3. AMPHETAMINES
  4. BARBITURATES
  5. BENZODIAZEPINES
  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  
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  
TeC Medical Instruments  
Trinity Biotech

## **CURRENT AND EMERGING TECHNOLOGIES**

1. MONOCLONAL ANTIBODIES
2. IMMUNOASSAYS
  - a. Technological Principle
  - b. Enzyme Immunoassays (EIA)
    - Overview
    - 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
- 6. MOLECULAR DIAGNOSTICS
  - a. Technology Overview
  - b. Amplification Methods
    - Polymerase Chain Reaction
    - Ligase Chain Reaction
    - Branched DNA
    - Q Beta Replicase
    - Strand Displacement Activation
    - Self Sustained Sequence Replicase

## **WORLDWIDE BUSINESS ENVIRONMENT**

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

#### 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



## 1. INDUSTRY DIVERSIFICATION

j. Physician Demographics

k. Aging Population

More Chronic Illness

Disease Incidence

Susceptibility to Infection

Multiple Illnesses Cases

l. Laboratory Regulations

## 2. MARKET STRUCTURE

a. Hospitals

b. Commercial/Private Laboratories

b. Personal Testing

## 1. GLUCOSE MONITORING

Market and Technology Overview

Invasive Testing

NonInvasive Testing

Genetic Testing

## 2. PREGNANCY TESTS

## 3. OCCULT BLOOD TESTS

## 4. MARKET SIZE AND GROWTH

c. Physician Offices/Group Practices

## 1. MARKET SUMMARY

## 2. MARKET STRUCTURE

## 3. TEST VOLUME AND SALES FORECASTS

d. 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
- e. Cancer Clinics

#### 1. INTRODUCTION

#### 2. MARKET SUMMARY

#### 3. TEST VOLUME AND SALES FORECASTS

- f. Ambulatory Care Centers

#### 1. INTRODUCTION

#### 2. MARKET SUMMARY

#### 3. MARKET STRUCTURE

#### 4. TEST VOLUME AND SALES FORECASTS

- g. Surgery Centers

#### 1. INTRODUCTION

#### 2. MARKET SUMMARY

#### 3. MARKET STRUCTURE

#### 4. TEST VOLUME AND SALES FORECASTS

- h. Nursing Homes 1. INTRODUCTION

#### 2. MARKET SUMMARY

#### 3. MARKET STRUCTURE

#### 4. TEST VOLUME AND SALES FORECASTS

### **1. BIRTH CENTERS**

#### 1. INTRODUCTION

#### 2. MARKET SUMMARY

#### 3. MARKET STRUCTURE

#### 4. TEST VOLUME AND SALES FORECASTS

J. Major Suppliers' Instrument Placements, Installed Base, Consumables Sales and Market Shares

### **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 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  
Diagnostica Stago/Trinity Biotech  
Diamedix  
Diasorin  
Eiken Chemical  
EKF Diagnostics  
Fujirebio/Innogenetics  
Grifols  
Helena Laboratories  
Hologic/GenProbe  
Horiba  
INSTRUMENTATION Laboratory  
International Technidyne/Nexus DX  
Kreatech  
Kyowa Medex  
Lonza  
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

EXECUTIVE SUMMARY Table I: All Decentralized Testing Markets, Diagnostics Sales  
Forecasts by Market Segment

EXECUTIVE SUMMARY Table II: All Decentralized Testing Markets, Reagent Sales

Forecasts by Market Segment

EXECUTIVE SUMMARY Table III: All Decentralized Testing Markets, Instrument Sales

Forecasts by Market Segment

Major Companies Developing or Marketing Albumin Tests  
Major Companies Developing or Marketing Alkaline Phosphatase Tests  
Major Companies Developing or Marketing ALT/SGPT Tests  
Major Companies Developing or Marketing Amylase Tests  
Major Companies Developing or Marketing AST/SGOT Tests  
Major Companies Developing or Marketing Bilirubin Tests  
Major Companies Developing or Marketing Blood Gas Analyzers  
Major Companies Developing or Marketing BUN Tests  
Major Companies Developing or Marketing Calcium Tests  
Major Companies Developing or Marketing Cholesterol Tests  
Major Companies Developing or Marketing Creatinine Tests  
Major Companies Developing or Marketing Electrolyte Tests  
Major Companies Developing or Marketing Ferritin Tests  
Major Companies Developing or Marketing GGT Tests  
Major Companies Developing or Marketing Glucose Tests  
Major Companies Developing or Marketing HDL Tests  
Major Companies Developing or Marketing Iron Tests  
Major Companies Developing or Marketing LDH Tests  
Major Companies Developing or Marketing Magnesium Tests  
Major Companies Developing or Marketing Phosphorus Tests  
Major Companies Developing or Marketing Protein Tests  
Major Companies Developing or Marketing Triglycerides Tests  
Major Companies Developing or Marketing Uric Acid Tests  
Major Companies Developing or Marketing Vitamin b12/Folate Tests  
Major Companies Developing or Marketing AIDS Tests  
Major Companies Developing or Marketing Adenovirus Tests  
Major Companies Developing or Marketing Campylobacter Tests  
Major Companies Developing or Marketing Candida Tests  
Major Companies Developing or Marketing CMV Tests  
Major Companies Developing or Marketing EBV Tests  
Major Companies Developing or Marketing Gonorrhoea Tests  
Major Companies Developing or Marketing Helicobacter Pylori Tests  
Major Companies Developing or Marketing Hepatitis Tests  
Major Companies Developing or Marketing Herpes Tests  
Major Companies Developing or Marketing Influenza Tests  
Major Companies Developing or Marketing Legionella Tests

Major Companies Developing or Marketing Lyme Disease Tests  
Major Companies Developing or Marketing Measles Tests  
Major Companies Developing or Marketing Meningitis Tests  
Major Companies Developing or Marketing Mononucleosis Tests  
Major Companies Developing or Marketing Mumps Tests  
Major Companies Developing or Marketing Mycoplasma Tests  
Major Companies Developing or Marketing Pneumonia Tests  
Major Companies Developing or Marketing RSV Tests  
Major Companies Developing or Marketing Rotavirus Tests  
Major Companies Developing or Marketing Rubella Tests  
Major Companies Developing or Marketing Salmonella Tests  
Major Companies Developing or Marketing Shigella Tests  
Major Companies Developing or Marketing Streptococci Tests  
Major Companies Developing or Marketing Syphilis Tests  
Major Companies Developing or Marketing AFP Tests  
Major Companies Developing or Marketing CEA Tests  
Major Companies Developing or Marketing Occult Blood Tests  
Major Companies Developing or Marketing Prostatic Acid Phosphatase Tests  
Major Companies Developing or Marketing PSA Tests  
Major Companies Developing or Marketing FSH Tests  
Major Companies Developing or Marketing HCG Tests  
Major Companies Developing or Marketing LH Tests  
Major Companies Developing or Marketing Prolactin Tests  
Major Companies Developing or Marketing T3 Tests  
Major Companies Developing or Marketing T4 Tests  
Major Companies Developing or Marketing TSH Tests  
Major Companies Developing or Marketing TDM Tests  
Major Companies Developing or Marketing Digoxin Tests  
Major Companies Developing or Marketing Lithium Tests  
Major Companies Developing or Marketing Phenytoin/Dilantin Tests  
Major Companies Developing or Marketing Theophylline Tests  
Major Companies Developing or Marketing Valproic Acid Tests  
Major Companies Developing or Marketing APTT Tests  
Major Companies Developing or Marketing Alpha 2 Antiplasmin Tests  
Major Companies Developing or Marketing Antithrombin III Tests  
Major Companies Developing or Marketing Bleeding Time Tests  
Major Companies Developing or Marketing D Dimer Tests  
Major Companies Developing or Marketing Factor Assays Tests  
Major Companies Developing or Marketing Fibrin Degradation Product Tests

Major Companies Developing or Marketing Fibrinogen Tests  
Major Companies Developing or Marketing Heparin Tests  
Major Companies Developing or Marketing Protein C Tests  
Major Companies Developing or Marketing Protein S Tests  
Major Companies Developing or Marketing PT Tests  
Major Companies Developing or Marketing Thrombin Time Tests  
Major Companies Developing or Marketing CRP Tests  
Major Companies Developing or Marketing Drugs of Abuse Tests  
U.S.A., Personal Testing Total Diagnostic Market Forecast  
U.S.A., Physician Offices/Group Practices Total Diagnostic Sales Forecast by Market Segment  
U.S.A., Physician Offices/Group Practices Reagent Sales Forecast by Market Segment  
U.S.A., Physician Offices/Group Practices Instrument Sales Forecast by Market Segment  
U.S.A., Office Based Physicians Forecast by Practice Type  
U.S.A., Physician Offices/Group Practices Forecast by Type  
U.S.A., Physician Office/Group Practice Laboratories Forecast by Practice Size  
U.S.A., Physician Offices/Group Practices Routine and Special Chemistry Test Volume Forecast  
U.S.A., Physician Offices Laboratories Major Infectious Disease Test Volume Forecast  
U.S.A., Physician Offices/Group Practice Microbiology Test Volume Forecast by Market Segment  
U.S.A., Physician Offices/Group Practices Routine Hematology Test Volume Forecast  
U.S.A., Physician Offices Laboratories Flow Cytometry and Special Hematology Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Coagulation Test Volume Forecast  
U.S.A., Physician Offices/Group Practices TDM Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Endocrine Function Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Major Tumor Marker Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Immunoprotien Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Drugs of Abuse Test Volume Forecast  
U.S.A., Physician Offices/Group Practices Routine and Special Chemistry Test Volume Forecast by Practice Type  
U.S.A., Physician Offices/Group Practices Microbiology/Infectious Disease Test Volume Forecast by Practice Type  
U.S.A., Physician Offices/Group Practices Hematology and Flow Cytometry Test Volume Forecast by Practice Type  
U.S.A., Physician Offices/Group Practices TDM Test Volume Forecast by Practice Type  
U.S.A., Physician Offices/Group Practices Endocrine Function Test Volume Forecast by

## Practice Type

U.S.A., Physician Offices/Group Practices TUMOR MARKERS Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Immunoprotein Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Drugs of Abuse Test Volume Forecast by Practice Type

U.S.A., Physician Offices/Group Practices Routine and Special Chemistry Reagent Market Forecast by Test

U.S.A., Physician Offices Laboratories Major Infectious Disease Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Microbiology Reagent Market Forecast by Market Segment

U.S.A., Physician Offices/Group Practices Hematology and Flow Cytometry Consumables Market Forecast

U.S.A., Physician Offices/Group Practices TDM Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Endocrine Function Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Major Tumor Marker Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Coagulation Reagent Market Forecast

U.S.A., Physician Offices/Group Practices Immunoprotein Reagent Market Forecast by Test

U.S.A., Physician Offices/Group Practices Drugs of Abuse Reagent Market Forecast by Test

U.S.A., ANCILLARY HOSPITAL LOCATIONS Estimated Number

U.S.A., ANCILLARY HOSPITAL LOCATIONS Annual Utilization

U.S.A., Hospital Emergency Departments Total Diagnostics Sales Forecast by Market Segment

U.S.A., Hospital Emergency Departments Reagent Sales Forecast by Market Segment

U.S.A., Hospital Emergency Departments Instrument Sales Forecast by Market Segment

U.S.A., Hospital Emergency Departments Routine and Special Chemistry Test Volume Forecast

U.S.A., Hospital Emergency Departments Profiles, Panels and Individual Tests

U.S.A., Hospital Emergency Departments Drugs of Abuse Test Volume Forecast

U.S.A., Hospital Emergency Departments Routine Hematology Test Volume Forecast

U.S.A., Hospital Emergency Departments Coagulation Test Volume Forecast

U.S.A., Hospital Emergency Departments Selected Infectious Disease Test Volume



**Forecast****U.S.A., Hospital Emergency Departments Routine and Special Chemistry Reagent****Market Forecast by Test****U.S.A., Hospital Emergency Departments Drugs of Abuse Reagent Market Forecast by****Test****U.S.A., Hospital Emergency Departments Hematology Reagent Market Forecast****U.S.A., Hospital Emergency Departments Coagulation Reagent Market Forecast****U.S.A., Hospital Emergency Departments Selected Infectious Disease Reagent Market****Forecast by Test****U.S.A., Hospital Operating and Recovery Suites Total Diagnostics Sales Forecast by****Market Segment****U.S.A., Hospital Operating and Recovery Suites Reagent Sales Forecast by Market****Segment****U.S.A., Hospital Operating and Recovery Suites Instrument Sales Forecast by Market****Segment****U.S.A., Hospital Operating and Recovery Suites Routine and Special Chemistry****Reagent Test Volume Forecast****U.S.A., Hospital Operating and Recovery Suites Routine Hematology Test Volume****Forecast****U.S.A., Hospital Operating and Recovery Suites Coagulation Test Volume Forecast****U.S.A., Hospital Operating and Recovery Suites Routine and Special Chemistry****Reagent Market Forecast by Test****U.S.A., Hospital Operating and Recovery Suites Hematology Reagent Market Forecast****U.S.A., Hospital Operating and Recovery Suites Coagulation Reagent Market Forecast****U.S.A., Hospital ICUs/CCUs Total Diagnostics Sales Forecast by Market Segment****U.S.A., Hospital ICUs/CCUs Reagent Sales Forecast by Market Segment****U.S.A., Hospital ICUs/CCUs Instrument Sales Forecast by Market Segment****U.S.A., Hospital ICUs/CCUs Routine and Special Chemistry Test Volume Forecast****U.S.A., Hospital ICUs/CCUs Routine Hematology Test Volume Forecast****U.S.A., Hospital ICUs/CCUs Coagulation Test Volume Forecast****U.S.A., Hospital ICUs/CCUs Routine and Special Chemistry Reagent Market Forecast****by Test****U.S.A., Hospital ICUs/CCUs Hematology Reagent Market Forecast****U.S.A., Hospital ICUs/CCUs Coagulation Reagent Market Forecast****U.S.A., Cancer Clinics Total Diagnostics Sales Forecast by Market Segment****U.S.A., Cancer Clinics Reagent Sales Forecast by Market Segment****U.S.A., Cancer Clinics Instrument Sales Forecast by Market Segment****U.S.A., Cancer Clinics Major TUMOR MARKERS Test Volume Forecast****U.S.A., Cancer Clinics Routine and Special Chemistry Test Volume Forecast**

U.S.A., Cancer Clinics Routine Hematology/Flow Cytometry Test Volume Forecast  
U.S.A., Cancer Clinics Endocrine Function Test Volume Forecast  
U.S.A., Cancer Clinics Coagulation Test Volume Forecast  
U.S.A., Cancer Clinics Major Tumor Marker Sales Forecast by Test  
U.S.A., Cancer Clinics Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Cancer Clinics Hematology and Flow Cytometry Reagent Market Forecast  
U.S.A., Cancer Clinics Endocrine Function Reagent Market Forecast  
U.S.A., Cancer Clinics Coagulation Reagent Market Forecast  
U.S.A., Ambulatory Care Centers Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Ambulatory Care Centers Reagent Sales Forecast by Market Segment  
U.S.A., Ambulatory Care Centers Instrument Sales Forecast by Market Segment  
U.S.A., Ambulatory Care Centers Estimated Number of Facilities and Patient Visits  
U.S.A., Ambulatory Care Centers Most Frequent Diagnoses  
U.S.A., Ambulatory Care Centers Routine and Special Chemistry Test Volume Forecast  
U.S.A., Ambulatory Care Centers Routine Hematology Test Volume Forecast  
U.S.A., Ambulatory Care Centers Microbiology and Serology Test Volume Forecast  
U.S.A., Ambulatory Care Centers Drugs of Abuse Test Volume Forecast  
U.S.A., Ambulatory Care Centers Coagulation Test Volume Forecast  
U.S.A., Ambulatory Care Centers Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Ambulatory Care Centers Drugs of Abuse Reagent Market Forecast by Test  
U.S.A., Ambulatory Care Centers Hematology Reagent Market Forecast  
U.S.A., Ambulatory Care Centers Microbiology and Serology Reagent Market Forecast by Test  
U.S.A., Ambulatory Care Centers Coagulation Reagent Market Forecast  
U.S.A., Surgery Centers Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Surgery Centers Reagent Sales Forecast by Market Segment  
U.S.A., Surgery Centers Instrument Sales Forecast by Market Segment  
U.S.A., Surgery Centers Most Frequently Performed Procedures  
U.S.A., Surgery Centers Routine and Special Chemistry Test Volume Forecast  
U.S.A., Surgery Centers Routine Hematology Test Volume Forecast  
U.S.A., Surgery Centers Coagulation Test Volume Forecast  
U.S.A., Surgery Centers Microbiology and Serology Test Volume Forecast  
U.S.A., Surgery Centers Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Surgery Centers Hematology Consumable Market Forecast  
U.S.A., Surgery Centers Coagulation Reagent Market Forecast  
U.S.A., Nursing Homes Total Diagnostics Sales Forecast by Market Segment

U.S.A., Nursing Homes Reagent Sales Forecast by Market Segment  
U.S.A., Nursing Homes Instrument Sales Forecast by Market Segment  
U.S.A., Nursing Homes Estimated Number of Facilities, Beds and Occupancy Rate  
U.S.A., Nursing Homes Routine and Special Chemistry Test Volume Forecast  
U.S.A., Nursing Homes Coagulation Test Volume Forecast  
U.S.A., Nursing Homes Routine Hematology Test Volume Forecast  
U.S.A., Nursing Homes Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Nursing Homes Coagulation Reagent Market Forecast  
U.S.A., Nursing Homes Hematology Reagent Market Forecast  
U.S.A., Birth Centers Total Diagnostics Sales Forecast by Market Segment  
U.S.A., Birth Centers Reagent Sales Forecast by Market Segment  
U.S.A., Birth Centers Instrument Sales Forecast by Market Segment  
U.S.A., Birth Centers Facilities, Patient Visits, and Births  
U.S.A., Birth Centers Routine and Special Chemistry Test Volume Forecast  
U.S.A., Birth Centers Profiles, Panels and Individual Tests  
U.S.A., Birth Centers Microbiology and Serology Test Volume Forecast  
U.S.A., Birth Centers Coagulation Test Volume Forecast  
U.S.A., Birth Centers Routine Hematology Test Volume Forecast  
U.S.A., Birth Centers Routine and Special Chemistry Reagent Market Forecast by Test  
U.S.A., Birth Centers Microbiology and Serology Testing Market Forecast  
U.S.A., Birth Centers Hematology Reagent Market Forecast  
U.S.A., Birth Centers Coagulation Reagent Market Forecast  
U.S.A., Major Suppliers of Clinical Chemistry Diagnostics Products, Estimated Sales and Market Shares  
U.S.A., Major Suppliers of Clinical Chemistry Reagents, Estimated Market Shares  
U.S.A., Major Suppliers of Clinical Chemistry Analyzers, Estimated Market Shares  
U.S.A., Major Suppliers of Immunodiagnostic Products, Estimated Market Shares  
U.S.A., Major Suppliers of Immunoassay Reagents, Estimated Market Shares  
U.S.A., Major Suppliers of Immunoassay Analyzers, Estimated Market Shares  
U.S.A., AIDS Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Chlamydia Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., CMV Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Gonorrhea Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Helicobacter Pylori Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Hepatitis Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Herpes Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Influenza Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Lyme Disease Testing Market Estimated Market Shares of Major Suppliers

U.S.A., Mononucleosis Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Rubella Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Streptococci Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., Syphilis Testing Market Estimated Market Shares of Major Suppliers  
U.S.A., AFP Testing Market By Major Suppliers  
U.S.A., CA 15 3/27 29 Testing Market by Major Suppliers  
U.S.A., CA 19 9 Testing Market by Major Suppliers  
U.S.A., CEA Testing Market by Major Suppliers  
U.S.A., PAP Testing Market by Major Suppliers  
U.S.A., PSA Testing Market by Major Suppliers  
U.S.A., Hematology Analyzers Estimated Placements and Installed Base  
U.S.A., Flow Cytometers Estimated Placements and Installed Base  
U.S.A., Hematology Diagnostics Market Estimated Market Shares of Major Suppliers  
U.S.A., Hematology Instrument Market Estimated Market Shares of Major Suppliers  
U.S.A., Hematology Consumable Market Estimated Market Shares of Major Suppliers  
U.S.A., Flow Cytometry Diagnostics Market Estimated Market Shares of Major Suppliers  
U.S.A., Flow Cytometry Consumable Market Estimated Market Shares of Major Suppliers  
U.S.A., Flow Cytometry Instruments Market Estimated Market Shares of Major Suppliers  
U.S.A., Major Suppliers of Coagulation Diagnostic Products Estimated Market Shares of Major Suppliers

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