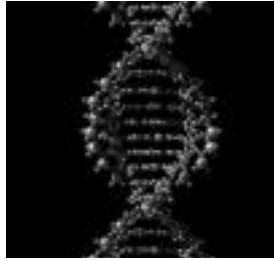




MEDICAL DEVICES



PHARMACEUTICALS



CHEMICALS



FOOD & BEVERAGE



ELECTRONICS

This report is being updated. Subscribers will receive complimentary copies of the previous edition while the new report is in preparation.

2010

Decentralized Diagnostic Testing Markets

BUSINESS CHALLENGES AND
MARKETING STRATEGIES FOR
SUPPLIERS

OPPORTUNITIES
MARKETS
TECHNOLOGIES
PRODUCTS
SUPPLIERS

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ABOUT THIS REPORT

The “**Decentralized Diagnostic Testing Markets**” report is part of a worldwide multiclient study series published by VENTURE PLANNING GROUP. The thrust of the study is to help current suppliers, as well as companies planning to diversify into decentralized testing markets, to evaluate emerging opportunities in these dynamic and increasingly competitive market segments, and to assist decision-makers in developing effective business, R&D and marketing strategies.

The study is based on a combination of primary and secondary sources of information, including a comprehensive review of the most recent technical and business publications, manufacturer product literature, industry analyst reports, and VENTURE PLANNING GROUP's proprietary data files.

This two-volume, 1,000-page report contains 250 tables and presents the following information:

Market Segmentation Analysis

A comprehensive market segmentation analysis, including review of the market dynamics, trends, structure, size, growth and major suppliers.

Five- and ten-year test volume and reagent sales forecasts for nearly 300 chemistry, immunoassay, microbiology, hematology and coagulation procedures by market segment, including:

- 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

Five- and ten-year test volume, as well as reagent and instrument sales forecasts by market segment for the following test categories:

- Routine and Special Chemistry
- Microbiology/Infectious Diseases
- Hematology
- Flow Cytometry
- Coagulation
- TDM
- Endocrine Function
- Tumor Markers
- Immunoproteins
- Drugs of Abuse

Sales and Market Share Analysis

- The report presents sales and market share estimates for major reagent and instrument suppliers.

Current and Emerging Products

- Analysis of over 130 diagnostic procedures.
- Review of leading chemistry, hematology and coagulation analyzers, both currently marketed and those in development, including their operating characteristics, features and selling prices.

Technology Review

- Assessment of emerging technologies and their potential applications for decentralized testing markets.
- Comprehensive listings of companies developing or marketing decentralized testing technologies and products, by test.

Competitive Assessments

- Extensive strategic assessments of major suppliers and emerging market entrants, including their 2009 sales estimates, product portfolios, marketing tactics, joint ventures, and new products in R&D.

Strategic Recommendations

- Specific opportunities for new instruments and reagent systems, with potentially significant market appeal during the next ten years.
- Design criteria for new decentralized testing products.
- Alternative business expansion strategies.
- Potential market entry barriers and risks.



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Decentralized Diagnostic Testing Markets

Business Challenges And Marketing Strategies

For Suppliers

RATIONALE

The growing economic pressures on hospitals, coupled with advances in technology, intensifying competition among suppliers and physicians, and changing consumer demands are shifting the diagnostic testing from hospital and commercial laboratories closer to the patient. VENTURE PLANNING GROUP, a leading international publishing and consulting company, has designed this in-depth multiclient survey to identify strategic business and new product development opportunities emerging in the decentralized testing markets during the next ten years. The survey will provide a comprehensive analysis of ten market segments, including their size and growth through 2019, future market requirements, emerging technologies and products; profile major competitors and anticipated market entrants; and propose specific business expansion strategies for instrument and consumable suppliers.

STUDY CONTENT

THE DECENTRALIZATION PHENOMENON

The study analyzes the major economic, technological, demographic, regulatory, and social driving forces, along with their impact on the decentralization phenomenon through 2019.

MAJOR DECENTRALIZED/POC TESTING MARKET SEGMENTS

The following decentralized/POC testing market segments are included:

- Ambulatory care centers
- Ancillary hospital locations
- Emergency departments
- Intensive care units
- Operating suites
- Birth centers
- Cancer clinics
- Home/self testing
- Nursing homes
- Physician offices/group practices.
(this market will be further segmented by physician specialty, practice composition and size)
- Surgery centers, and others

TEST CATEGORIES

The study provides the 5- and 10-year test volume and sales forecasts for the following assay categories:

- Coagulation
- Chemistry
- Drugs of Abuse
- Endocrine Function
- Flow Cytometry
- Hematology
- Microbiology/Infectious Diseases
- TDM
- Tumor Markers
- Urinalysis

MARKET SHARE ANALYSIS

The study provides sales and market share estimates for major suppliers of decentralized testing instruments and reagents.

TECHNOLOGICAL ASSESSMENT

A detailed analysis of the following technologies and their market applications is provided:

- Biochips
- Biosensors
- DNA Probes
- Immunoassays
- IT
- Monoclonal/polyclonal antibodies, and others

FUTURE REGULATORY ENVIRONMENT

Current status and anticipated changes in government regulations will be explored, including the following issues:

- Reimbursement
- Certification and licensing
- Diagnostic efficacy
- Labeling requirements
- Performance standards
- Pre-market testing, and others

INNOVATIVE MARKETING STRATEGIES

The report explores innovative promotion and distribution strategies, as well as pros and cons of using direct sales force versus distributors and dealers.

MARKET NEEDS AND CHALLENGES

The study identifies the major opportunities emerging in the decentralized testing markets during the next ten-years, and proposes "ideal" product models with tentative operating characteristics and prices.

MARKET PARTICIPANTS

The major suppliers and emerging market entrants are profiled, including their sales estimates, product portfolios, technological know-how, new products in R&D, collaborative arrangements, and marketing strategies.

- | | | | |
|-----------------------|-----------------------|----------------------------|-------------------------|
| - Abaxis | - Chematics | - Immucor | - Response Biomedical |
| - Abbott | - Compucyte | - IL | - Roche |
| - Alfa Wassermann | - C.R. Bard | - International Biomedical | - Shimadzu |
| - Arkray | - DexCom | - IRIS | - Siemens |
| - Bayer | - Fuji Photo Film | - J&J | - Spectral Diagnostics |
| - Beckman Coulter | - Guided Therapeutics | - Konica | - Stanbio Laboratory |
| - Becton Dickinson | - Hemagen Diagnostics | - Medtronic | - Strategic Diagnostics |
| - Bio-Chem Tech Lab | - Hemocue | - Menarini | - Worldwide Medical, |
| - Bio-Rad | - Hologic | - Nova Biomedical | and others |
| - Bioscrip | - Home Diagnostics | - Orion | |
| - Biosite Diagnostics | - Horiba | - Quidel | |

BUSINESS OPPORTUNITIES & STRATEGIC RECOMMENDATIONS

- | | |
|--|---|
| - Emerging business and new product opportunities. | - Alternative marketing tactics. |
| - Potential market entry barriers and risks. | - Strategic planning issues and concerns. |

METHODOLOGY

The study is based on a combination of primary and secondary information sources, including a comprehensive worldwide survey of technical and business periodicals, manufacturer product and financial literature, and industry analyst reports. Additional information was retrieved from VENTURE PLANNING GROUP's proprietary data files, developed during the firm's over 100 syndicated studies and numerous single-client assignments. This database contains current information on various healthcare and biotechnology markets, technologies, companies, products and executives worldwide.

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