

Clinical Chemistry Analyzers

Published: 2010-OCT-01

Pages: 173

Format: PDF

Description

Clinical chemistry analysis is one of the most important areas within clinical laboratory analysis. The term clinical chemistry usually refers to determining the concentration or activity of a protein, carbohydrate, lipid, electrolyte, enzyme or small molecule in easily-collected bodily fluids such as blood, serum, plasma or urine. However, it is not necessarily limited to these determinations.

The analysis of virtually any biologically-active substance--any place in the body--can loosely be defined as clinical chemistry. In fact, traditional specialization barriers such as microbiology, hematology, blood banking, immunology and even anatomical pathology are rapidly fading, both operationally and instrumentally. But for the sake of defining the subject to a reasonable size, the more traditional scope of clinical chemistry will be the subject of this TriMark Publications study.

The purpose of this report is to describe the specific segments of the global clinical chemistry instrumentation market. Specifically, this study examines the markets for small lab and highly-automated, large lab platforms, as well as accessory equipment such as reagents, supplies and manufacturers' original equipment manufacturer (OEM) additional equipment. The emphasis is on those companies and products that are actively developing and marketing chemistry analyzer products for the clinical setting, including hospitals, independent labs, physician's offices and clinics. Concentration is on the clinical chemistry instrumentation industry market segment in the U.S. and around the world. Particular attention is paid to those areas of the clinical chemistry instrumentation sector that are showing the greatest growth or the most innovation.

Table of Contents

1. Overview	6
1.1 Objectives of the Report	6
1.2 Methodology	6
1.3 Scope of the Report	8
1.4 Executive Summary	8
2. IVD Clinical Chemistry Market	12
2.1 Introduction	12
3. IVD Clinical Chemistry Market	14
3.1 Markets	14
3.1.1 Global Markets	14
3.1.2 Global Drivers of Clinical Chemistry Testing	16
3.1.3 Global Outlook	17
3.1.4 U.S. Market	18
3.1.5 European Market	19
3.1.5.1 German Clinical Chemistry Diagnostic Markets	22
3.1.5.2 U.K. Clinical Chemistry Testing Diagnostic Market	23
3.1.5.2.1 U.K. Market Statistics	24
3.1.5.2.2 U.K. Competitive Analysis	25
3.1.5.2.3 U.K. Market Access	26
3.1.5.3 French Clinical Chemistry Diagnostic Market	26
3.1.5.4 Italian Clinical Chemistry Diagnostic Market	27
3.1.5.5 Spanish Clinical Chemistry Diagnostic Market	27
3.1.5.6 Scandinavian Clinical Chemistry Market	28
3.1.5.7 Country Clinical Chemistry Smaller Markets	28
3.1.5.7.1 Canadian Clinical Chemistry Market	28
3.1.5.7.2 Brazilian Clinical Chemistry Market	29
3.1.5.7.3 Turkish Clinical Chemistry Market	30
3.1.5.7.4 Australian Clinical Chemistry Market	30
3.1.5.7.5 Mexican IVD Market	31
3.1.5.8 Remaining World Clinical Chemistry Testing Market	31
3.1.5.9 Overview of Asian Healthcare Market	32
3.1.5.10 Japanese Clinical Chemistry Testing Market	32

BioMarket Group - A Global Online Aggregator of Life Science Market Research

- 3.1.5.11 Chinese Clinical Analyzer Market 33
- 3.1.5.12 Indian Clinical Chemistry Diagnostic Market 44
- 3.1.5.12.1 India's In Vitro Diagnostic Testing Industry 44
- 3.1.5.13 Overview of the Latin American Diagnostics Market 47
- 3.2 Clinical Chemistry Sector 48
 - 3.2.1 Industry-served Markets 48
 - 3.2.2 Industry Players 51
 - 3.2.2.1 Manufacturing Companies 51
 - 3.2.3 Market Specialization 51
 - 3.2.4 Revenue and Reimbursement 53
 - 3.2.5 Companies 54
- 3.3 Outlook for Clinical Chemistry Testing 55
 - 3.3.1 Long-term Changes 55
 - 3.3.2 Market Drivers 56
 - 3.3.3 The Limits to Growth 56
 - 3.3.4 Hot Sectors in the IVD Market 57
 - 3.3.5 Key Technologies 57
 - 3.3.6 Conclusion 58
- 4. Clinical Chemistry Instrument Market by Sector: Size, Growth, Share and Competitors 59
 - 4.1 Ultra-Large Throughput Chemistry Analyzers 59
 - 4.2 Large-Throughput Analyzers 69
 - 4.3 Mid-Size Clinical Chemistry Analyzers 83
 - 4.4 Chemistry Analyzers for the Small-Volume Market 92
 - 4.5 Laboratory Analyzers for the Small-Volume Market 94
- 5. Important Technology Trends 101
 - 5.1 Technology Platform Innovations in Clinical Chemistry Testing 101
 - 5.2 Sensor Systems for Diagnostic Applications 101
 - 5.3 Broad and Expanded Test Menus 103
 - 5.4 Consolidation of Analyzer Functions 103
 - 5.5 The New Paradigm 103
 - 5.6 Consolidated Workstations 104
 - 5.7 Automation in the Laboratory in Response to Labor Shortages 105
 - 5.8 Laboratory Information Systems 106
 - 5.9 Biosensor Technology 107
 - 5.10 Data-Management Issues 109
 - 5.10.1 Wireless LANs 109
 - 5.10.2 Data and Workflow Management Systems 110
 - 5.10.3 Beckman Command Central Version 2.0 110
 - 5.11 Connectivity Platforms 111
 - 5.11.1 Laboratory Data Linking Software and Interface to the Laboratory Information System 112
 - 5.11.2 AbbottLink Analyzer Connections 113
 - 5.11.3 Beckman Coulter DL2000 Data Manager v6.5 115
 - 5.11.4 bioMerieux, Inc. ENQ 115
 - 5.11.5 Siemens Easy Link Data Management System 115
- 6. Business Trends in the Clinical Chemistry Analyzer Sector 117
 - 6.1 Key Developments 117
 - 6.2 Sector Consolidation 117
 - 6.3 Diagnostic Testing Growth Trends 118
 - 6.4 Reagent and Hardware Business in Japan, China and Asia 119
 - 6.5 New Products 119
 - 6.6 Acquisition, License Agreements, Internal Development and Partnerships 120
 - 6.7 Product Testing Depth in Clinical Chemistry Testing 120
 - 6.8 Government Regulation 121
 - 6.8.1 U.S. Regulation 121
 - 6.8.1.1 Importing Medical Devices to the U.S. 122
 - 6.8.1.2 Exporting Medical Devices from the U.S. 123
 - 6.8.2 U.K. Regulation 123
 - 6.8.3 E.U. Regulation 124
 - 6.8.4 Japanese Regulation 126
 - 6.8.5 Korean Regulation 126
 - 6.8.6 Regulatory Trends for IVD Devices 126
 - 6.9 Medicare Reimbursement Trends 128
- 7. Company Profiles 131
 - 7.1 Abaxis, Inc. 131
 - 7.2 Abbott Diagnostics 133
 - 7.3 Adaltis 139
 - 7.4 Alfa Wasserman, Inc. (f/k/a Electro-Nucleonics, Inc. and Schiapparelli Biosystems, Inc.) 139
 - 7.5 Awareness Technology, Inc. 140
 - 7.6 Siemens 140
 - 7.7 Beckman Coulter, Inc. 143
 - 7.8 Dade Behring, Inc. 148
 - 7.9 Hitachi Ltd. 148

BioMarket Group - A Global Online Aggregator of Life Science Market Research

7.10	Horiba Ltd.	149
7.11	JEOL Ltd.	150
7.12	Nova Biomedical Corporation	150
7.13	Ortho-Clinical Diagnostics, Inc.	150
7.14	Roche	152
7.15	Shimadzu Corporation	153
7.16	Sysmex Corporation	154
7.17	Thermo Fisher Scientific, Inc.	155
7.18	Vital Scientific B.V.	156
7.19	Tosoh Corporation	157
8.	Clinical Chemistry Testing Sector Trends and Forecasts	158
8.1	Home Care Analysis	158
8.2	Non-traditional Collection for Chemistry Testing	158
8.3	New Systems for Critical-Care and Near-Patient Testing	158
8.4	Utility of Near-Patient Testing in Critical-Care Settings	158
8.5	Mergers of Diagnostic Companies	158
8.6	Information Management Advances	159
8.7	Test Ordering Patterns	159
8.8	Patient Satisfaction	159
8.9	Move Away from Central Laboratory	159
8.10	Healthcare Cost Controls	159
8.11	Competition for Services	159
8.12	Drivers of Clinical Chemistry Testing	160
8.13	Confluence of New Technology	160
8.14	New Trends in Clinical Laboratory Testing	160
8.14.1	Trends in Reimbursement Practices	160
8.14.2	Managed Care	163
8.14.3	Changes in Patient Management	163
8.14.4	Focused Testing	163
8.14.5	Satellite Facilities	163
8.14.6	Point-of-Care Testing	164
8.14.7	Regionalization of Laboratory Care	164
8.15	New Chemistry Analyzers	165
8.16	Multiplexing Technology	166
9.	Clinical Chemistry Product Introductions	168
9.1	Clinical Chemistry Analyzer Product Launches	168
9.2	Clinical Chemistry Reagent Product Launches	168

10. Corporate Directory 170

INDEX OF FIGURES

Figure 3.1:	IVD Market by Clinical Specialty	21
Figure 3.2:	Chinese IVD Market, 2006-2012	36
Figure 3.3:	Lab Revenue by Lab Type	49
Figure 3.4:	Lab Revenue by Test Type	49
Figure 4.1:	U.S. Market Share for Ultra-Large Clinical Chemistry Analyzers	68
Figure 4.2:	Non-U.S. Market Share for Ultra-Large Clinical Chemistry Analyzers	69
Figure 6.1:	Part B Spending on Clinical Laboratory Services, 1991-2007	128

INDEX OF TABLES

Table 3.1:	Worldwide IVD Testing Market, 2009	14
Table 3.2:	Worldwide Geographic Distribution of IVD Testing, 2009	14
Table 3.3:	Global Clinical Chemistry Revenues, 2000-2012	15
Table 3.4:	Worldwide Distribution of Clinical Chemistry Testing, 2009	15
Table 3.5:	Thirteen Largest Diagnostic Companies Worldwide, 2009	16
Table 3.6:	U.S. Clinical Chemistry Testing Market, 2009-2015	19
Table 3.7:	U.S. Clinical Laboratory Diagnostic Test Retail Value Market Segments, 2008	19
Table 3.8:	European Clinical Laboratory Testing IVD Reagents and Instruments Market, 2000-2012	19
Table 3.9:	European Clinical Laboratory Testing Diagnostics by Country Market Estimates, 2007	20
Table 3.10:	European Clinical Chemistry Testing Market, 2000-2009	22
Table 3.11:	German Clinical Chemistry Testing Diagnostics Products Market Sales, 2003-2012	22
Table 3.12:	German Hospital Clinical Chemistry Market, 2000-2009	23
Table 3.13:	U.K. Clinical Chemistry Diagnostics Products Market Sales, 2000-2009	24
Table 3.14:	Major U.K. IVD Manufacturers	25
Table 3.15:	U.S. IVD Manufacturers Doing Business in the U.K.	25
Table 3.16:	Other European Companies that Manufacture IVD Products in the U.K.	26
Table 3.17:	French Clinical Chemistry Diagnostics Products Market Sales, 2000-2009	26
Table 3.18:	Italian Chemistry Diagnostics Products Market Sales, 2000-2009	27
Table 3.19:	Spanish Clinical Chemistry Diagnostics Products Market Sales, 2000-2009	27
Table 3.20:	Scandinavian Clinical Chemistry Diagnostics Products Market Sales, 2000-2009	28

BioMarket Group - A Global Online Aggregator of Life Science Market Research

Table 3.21: Canadian Clinical Chemistry Testing Market, 2000-2009	28
Table 3.22: Brazilian IVD Testing Market, 2000-2009	29
Table 3.23: Brazilian Clinical Chemistry Testing Market, 2000-2009	29
Table 3.24: Turkish Clinical Chemistry Testing Market, 2000-2009	30
Table 3.25: Australian Clinical Chemistry Testing Market, 2000-2009	30
Table 3.26: Mexican IVD Testing Market, 2000-2009	31
Table 3.27: Mexican Clinical Chemistry Testing Market, 2000-2009	31
Table 3.28: The ROW Clinical Chemistry Testing Market, 2000-2009	32
Table 3.29: Japanese Clinical Chemistry Testing Market, 2000-2009	32
Table 3.30: Drivers of Growth in the Chinese Clinical Laboratory Market	33
Table 3.31: Number of Chinese Medical Institutions	34
Table 3.32: Chinese Clinical Diagnostic Products Market, 2000-2008	34
Table 3.33: Chinese Clinical Laboratory Diagnostics Products Market Sales, 2003-2012	35
Table 3.34: Chinese IVD Market, 2008	35
Table 3.35: Market Share of Reagent Imports into the Chinese Clinical Lab Market by Country of Origin	39
Table 3.36: Market Share of Analytical Instrument Imports into the Chinese Clinical Lab Market by Country of Origin	39
Table 3.37: Chinese International IVD Manufacturers	40
Table 3.38: Chinese Domestic IVD Manufacturers	40
Table 3.39: Chinese IVD Distributors	42
Table 3.40: Indian IVD Market, 2006-2012	44
Table 3.41: Number of Automated Clinical Labs in India, 2004-2012	44
Table 3.42: Indian IVD Market, 2009	45
Table 3.43: Indian IVD Market for Instruments and Reagents, 2004-2012	46
Table 3.44: Estimated Number of Clinical Laboratories in Latin America	47
Table 3.45: U.S. Clinical Laboratory Testing Sector Revenue, 2005-2015	48
Table 3.46: U.S. Clinical Laboratory Testing Sector Segments, 2009	48
Table 3.47: Esoteric Tests Performed in the Clinical Laboratory	50
Table 3.48: Growth Rates of Test Types	50
Table 3.49: Drivers of Clinical Lab Testing Volume	50
Table 3.50: Principal Marketers of Automated Clinical Chemistry Instruments	51
Table 4.1: Ultra-Large Clinical Chemistry Analyzers	68
Table 4.2: JEOL Analyzer Comparison	78
Table 4.3: Large Clinical Chemistry Analyzers	82
Table 4.4: Mid-Size Clinical Chemistry Analyzers	91
Table 4.5: Small Clinical Laboratory Analyzers	99
Table 5.1: Drivers of the Laboratory Information Systems Market Growth	107
Table 5.2: Restraints of the Laboratory Information Systems Market Growth	107
Table 5.3: Applications for Wireless LAN Technology	110
Table 5.4: Key Benefits of Laboratory Connectivity Platforms	111
Table 5.5: Connectivity Interface Platforms for Clinical Chemistry Analyzers	111
Table 6.1: Drivers of European Diagnostics Testing	128
Table 6.2: Drivers of European Reimbursement Practice	128
Table 6.3: Medicare Spending on Clinical Lab Services, 1991-2007	129
Table 6.4: Medicare Part B Spending Per Medicare Enrollee, 1998-2009	130
Table 6.5: Allowed Charges for Top 25 Clinical Laboratory Procedures, 2009	130
Table 7.1: Products Marketed by Abbott in the Diagnostic Market	138
Table 7.2: Products Marketed by Siemens in the Diagnostics Market	141
Table 7.3: Clinically-Significant Tests Available from Siemens	141
Table 7.4: VITROS ECiQ Immunodiagnostic System	151
Table 8.1: Medicare Billing Guidelines for Multi-channel Chemistry Tests	161

Ordering

Order Online - <http://www.biomarketgroup.com/market-research-report/clinical-chemistry-analyzers.html>

Order by Fax - using the form below

Order by Post - print the order form below and send to:

BioMarket Group
Björnnäsvägen 21
11419 STOCKHOLM
SWEDEN

Fax Order Form

To place an order via fax simply print this form, fill in the information below and fax the completed form to +46-8-56849191. If you have any questions please visit <http://www.biomarketgroup.com/market-research-report/contacts/>

Order Information

Please verify that the product information is correct:

Product Name: **Clinical Chemistry Analyzers**

Web Address: <http://www.biomarketgroup.com/market-research-report/clinical-chemistry-analyzers.html>

Format: PDF

Price:

Delivery of hard copy or CD-ROM is subject to a Courier charge of 50 USD.

Delivery within Sweden is subject to VAT at 25%.

Contact Information

Please enter all the information below in **BLOCK CAPITALS**

Title: _____

Name: _____

Email Address:* _____

Job Title: _____

Organization: _____

EU companies must supply: VAT / BTW / MOMS

MWST / IVA / FPA number:

Address: _____

Zip Code: _____

City: _____

State: _____

Country: _____

Phone Number: _____

Fax Number: _____

Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

- Pay by credit card:**
- American Express
 - Master Card
 - Visa

Cardholder Name: _____

Expiry Date (MM/YY): _____

Card Number: _____

CVV Number: _____

- Pay by check:**

Please post the check, accompanied by this form, to:
BioMarket Group
Björnnäsvägen 21
11419 STOCKHOLM
SWEDEN

- Pay by wire transfer:** Please transfer funds to:

Account number: 43521169

Swift code: HANDSESS

IBAN number: SE74 6000 0000 0000 4352 1169

Bank Address: Handelsbanken, Stockholm, Sweden

If you have a Marketing Code please enter it below:

Marketing Code: _____

Please supply purchase order number if needed:

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, Gmail)

Please note that by ordering from BioMarket Group you are agreeing to our Terms and Conditions at

<http://www.biomarketgroup.com/market-research-report/biomarket-group-full-terms-and-conditions/>

Please fax this form to: +46-8-56849191