Global Point of Care Diagnostics (POC) Market Size, Market Share, Application Analysis, Regional Outlook, Growth Trends, Competitive Scenario And Forecasts, 2012 To 2020

Description:

Industry Insights
Growing base of global geriatric population, the ability of point of care diagnostics tests to render immediate results and hence improved patient care and increasing market penetration of healthcare information systems such as PACS and EMR are the high impact rendering drivers of point of care diagnostics market. In addition, the introduction of Clinical Laboratory Improvement Amendments (CLIA) waived tests for point of care diagnostics is considered as the driver for this market.

The growing demand for home healthcare and the introduction of advanced technology enabled point of care diagnostics products are expected to drive the market at a rapid pace. The increasing demand for home healthcare products as a result of private and government initiatives and growing patient awareness levels aimed at reducing hospital stays and expenses associated with it. On account of the growing demand for home healthcare products, market players such as Abbott Laboratories and Roche Diagnostics have introduced portable products which are user friendly and therefore can be easily adopted by a patient. Key market players of point of care diagnostics market such as Abbott Laboratories, Beckman Coulter Inc. and Roche are targeting healthcare organizations to consequently enhance market revenue by promoting their products.

Product Insights
Point of care diagnostics product segment includes infectious diseases, blood gas or electrolytes, cardiac markers, hospital glucose testing, coagulation, hematology, primary care systems (lipid and Hba1c), urinalysis, decentralized clinical chemistry, drug abuse testing, fertility and rapid diagnostics tests. Glucose testing segment dominated the market revenue share at over 29% in 2013 owing to increasing prevalence of diabetes and requirement of constant blood sugar levels monitoring. According to IDF (International Diabetes Federation) estimates the global prevalence of diabetes will increase from 382 million in 2013 to 592 million in 2035. Rising demand for home healthcare catering to the rising prevalence of diabetes will serve this market as a driver.

The infectious disease point of care diagnostics products are identified as the most lucrative segment of the market. The high prevalence of infectious diseases such as hepatitis and HPV in countries such as India and China is one of the factors accounting for its high market attractiveness. This segment is expected to be followed by cardiac markers and coagulation point of care products. The efficacy exhibited by these markers in terms of cardiovascular disease diagnosis and the high prevalence of cardiovascular diseases together boost the demand for this market.

End-use Insight
End-user applications in the point of care diagnostics market consist of blood include hospitals, laboratories, assisted living healthcare facilities, clinics, home and others. The clinics and hospitals product segments accounted for the largest revenue market share. Increasing demand for decentralized facilities and greater volume of tests performed in healthcare facilities are two of the most important factors for their largest market shares.

Regional Insights
North America dominated the overall point of care diagnostics market share in terms of revenue. The implementation of Clinical Laboratory Improvement Amendments (CLIA) for particular POC products and tests is the high impact rendering driver of this market. The Asia Pacific point of care diagnostics market was is expected to grow at the fastest CAGR from 2014 to 2020 Presence of high unmet medical needs pertaining to target disease segments such as cancer, diabetes and other infectious diseases, growing patient awareness levels and constantly improving healthcare expenditure. Increasing levels of patient awareness will prove imperative for the growth of this market on account of the fact that patients especially the ones suffering from long term diseases such as diabetes are willingly participating in the shift pertaining to the implementation of point of care diagnostic practices. Moreover, healthcare practitioners are increasing their dependency on the usage of point of care diagnostic enabled medical devices and consumables.
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Abbott Laboratories
Siemens Healthcare
Beckman Coulter Inc.
Becton Dickinson and Company
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Johnson and Johnson
Abaxis Inc.
Alere Inc.
Danaher Corporation
Qiagen (AmniSure)
Spectral Diagnostics
Church & Dwight Co. Inc.
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