MARKET MONITOR™ Notes

Prominence Of Discipline Integration

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Introduction

MARKET MONITOR™ Notes are summary publications that focus on a particular issue or discipline within the clinical diagnostics industry. The data for these Notes is taken from the 2006 Clinical Chemistry MARKET MONITOR™.

This issue of MARKET MONITOR™ Notes addresses the prominence of integrated analyzers within the hospital segment of the clinical laboratory market. Data for this MARKET MONITOR™ Notes was gathered as recently as January of 2006. Approximately 1,100 hospital based laboratorians responded to this survey. At the time of this study, results were projected to a combined laboratory universe including 5,151 acute care, short-term hospitals. Throughout this article hospitals are segmented by bed size.

As part of The Clinical Chemistry MARKET MONITOR™, survey respondents are asked to report the brand and model of each general chemistry and immunoassay analyzer that is currently being used in their laboratories.

What Counts As Integration?

MARKET MONITOR™ considers the following instruments to be "integrated analyzers" based on width of menu controlled by one analyzer operator: Dade Behring Dimension RXL, Dade Behring Xpand, Roche ModulaR Chemistry/Immunoassay combination, Beckman Coulter Synchron Lxi725, and the Bayer Advia IMS 800i, the Bayer Advia 1650 or 2400/Centaur combination. These analyzers/systems are capable of performing chemistries, proteins, drugs of abuse, and TDM's, along with heterogeneous immunoassays. Instruments not included in this category generally lack sufficient heterogeneous immunoassay capability to be considered integrated (i.e. TSH, PSA, and other similar analytes.)

Who's Using Integrated Instruments?

Dade Behring controls the hospital market in number of accounts using an integrated analyzer.

Table 1 shows the number of hospital accounts using each of the integrated systems mentioned above during January of 2006. Data is also presented as a percent of the domestic short-term hospital universe. Table 2 on the back page, shows the difference in the findings from the previous year. For example, eighteen Abbott instruments were added from the previous year. Analyzers are only shown in years during which they were available.

TABLE 1: CCMM 2006 REPORT (DATA GATHERED IN JANUARY, 2006)

Instruments	Total	Hospital Bed Size Segments <50	50-99	100-199	200-399	400+
	----------------Number Of Accounts Mentioning----------------					
Dade Behring Dimension RXL/Xpand	1,901	550	501	440	312	98
Beckman Coulter Synchron Lxi725	290	5	46	107	104	28
Bayer Advia 1650 or 2400/Centaur	60	-	-	-	37	23
Bayer Advia IMS 800i	18	-	18	-	-	-
Abbott Architect ci8200	37	-	-	7	15	15
Roche Modular With E170	37	-	-	-	24	13
Total	2,344	556	564	553	493	178
Universe	5,134	1,359	1,083	1,220	1,015	457
Percent Of Universe	46	41	52	45	49	39

At the time of this study, approximately 2,344 hospitals or 45 percent of domestic short-term hospital laboratories were using an “integrated system”. This number is up from 39 percent in January of 2005. The incidence of integration ranges from 39 to 52 percent across the hospital bed size segments and is lowest at the extremes of the categories. While hospitals across all bed size segments have adopted Dade Behring’s integration solutions, Abbott, Bayer, Beckman Coulter, and Roche have placed the majority of their integrated systems in the larger hospital bed size categories.

TABLE 2: CHANGE FROM THE PREVIOUS YEAR

Instruments	Total	Hospital Bed Size Segments <50	50-99	100-199	200-399	400+
	---Change In The Number Of Accounts Mentioning---					
Abbott	18	-6	-	7	12	5
Bayer	21	-	18	-	4	-
Beckman Coulter	163	5	38	69	47	5
Dade Behring	174	155	69	-37	-22	9
Roche	-15	-	-	-	3	-19
Total	361	154	125	38	44	-1
Change As Percent Of Universe	7.0	11.4	11.5	3.2	4.3	-0.1

The largest year-to-year changes in terms of the net number of accounts acquiring “integrated” approaches to chemistry and immunoassay are the under 100 bed sectors. In each of these segments approximately one of every ten laboratories adopted an “integrated” approach. The growth of the use of integrated systems appears to have come to a halt in the largest bed size hospital segment, institutions with 400 or more beds. The expansion of use of integration has been marginal at best in the mid size facilities over this on year time period. The net growth of use of integrated systems is only 3.2 percent and 4.3 in the 100-199-bed size cell and the 200-399-bed size cell, respectively.

Conclusion

Discipline integration offers an attractive solution to hospital laboratory managers who are currently faced with labor shortages and a tragically under-skilled workforce. In theory, “integrated” analyzers reduce the opportunity of human errors, speed turnaround time, and improve efficiency by producing more work with fewer FTE’s. The first to introduce a true integration solution, Dade Behring enjoys a strong lead across all segments of the hospital market with four of every five laboratories using an “integrated” system employing a Dade Behring product.

About Information Dynamics

Information Dynamics is a *marketing information development company* serving the healthcare device and diagnostics markets. In business for over 26 years, Information Dynamics is the voice of the laboratory worker to manufacturers of goods and services for the clinical diagnostics market.

If you are interested in more detailed data or would like more information about our MARKET MONITOR™ program, please contact our office.

Information Dynamics
19 South Darlington Street
West Chester, Pennsylvania 19382
(610) 692-5272
info@infodyn.net

www.informationdynamics.net