Europe Clinical Laboratories Tests Market - Focused Insights 2024-2029

Market Report | 2024-07-04 | 87 pages | Arizton Advisory & Intelligence

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Report description:

The European clinical laboratory tests market is expected to grow at a CAGR of 2.65% from 2023 to 2029.
MARKET TRENDS & DRIVERS

Increasing Outsourcing of Clinical Laboratory Testing

Subcontracting and outsourcing by public and private hospital laboratories to benefit private organizations is a trend observed in the European clinical laboratory services sector, which hospital operators mainly drive. It is expected that subcontracting and outsourcing could represent a growing source of income for companies operating in this sector. Early in the COVID-19 pandemic, with non-essential labs forced to close, many turned to outsourcing providers to continue serving their customers. Due to the need to meet increased safety protocols for lab tests, lab managers must re-think their approach to completing work and identify more creative solutions than traditional approaches, including outsourcing laboratory operations that were not outsourced so that scientists can focus on higher-value tasks. This promises to streamline healthcare operations and significantly improve patient outcomes by providing more accurate, efficient, and secure healthcare services.

Rising Popularity of Digital Pathology Platforms

In numerous European regions, pathology practices increasingly adopt digital methods, replacing traditional routines with digital imaging. However, the journey toward digital pathology is not always straightforward. With rapid technological advances, it is crucial to recognize that transitioning to a digital approach will impact various aspects of daily operations in pathology laboratories. Meticulous planning and practical considerations are essential for a seamless shift toward an efficient digital workflow. Digital pathology is a multifaceted undertaking that demands careful planning from the outset. The preparatory phase should thoroughly analyze each institute's specific requirements, status, and objectives, recognizing that there is no one-size-fits-all solution. Before investing in significant equipment such as scanners, conducting trial phases with structured performance evaluations is advisable. To ensure digital pathology maintains diagnostic quality equivalent to conventional methods, laboratories must conduct validation studies encompassing the entire digital pathology process, including supplementary tools like image analysis software, following established guidelines or best practices. While overall acceptance of digital pathology appears to be high, individual pathologists may vary in their affinity for digital workflows. Creating a user-friendly, intuitive, and ergonomic digital workspace requires concerted effort but can greatly facilitate the transition to routine digital diagnostics.

INDUSTRY RESTRAINTS

High cost associated with Specialized Testing

The high cost of specialized diagnostic services may restrain growth during the forecast period. The increasing geriatric population in Europe, which is more susceptible to chronic infections, refrains from opting for these diagnostic services due to a lack of economic compatibility. Creating specialized tests involves extensive R&D, demanding a large investment, which is frequently passed on to the consumer, impeding business expansion.

SEGMENTATION INSIGHTS

INSIGHT BY TEST COMPLEXITY TYPE

The Europe clinical laboratory tests market by test complexity is segmented into specialty laboratory tests and routine laboratory tests. The routine tests segment occupied the largest market share of over 60% in 2023. Routine tests, majorly CLAI-waiver tests, are performed in many clinical laboratories. Most clinical laboratory tests are routine and performed on the whole blood, serum, plasma, and other body fluids such as urine and blood cell counts, thus helping segmental growth.

INSIGHT BY TEST TYPE

The Europe clinical laboratory tests market by test type is categorized into clinical & immunochemistry, molecular diagnostics, hematology, microbiology & cytology, and toxicology. The molecular diagnostics segment showcases significant growth, with the fastest-growing CAGR of over 5% during the forecast period. The presence of favorable reimbursement policies coupled with rising government support in the form of funding and initiatives for the development of diagnostic tests is anticipated to drive molecular diagnostics growth over the forecast period. In recent years, molecular diagnostics across Europe have seen significant advancements and widespread adoption. Molecular diagnostics involves detecting and analyzing nucleic acids such as DNA and RNA, proteins, and other molecules at the molecular level to diagnose diseases, predict patient outcomes, and guide treatment decisions.

INSIGHT BY PROVIDER TYPE

The hospital-based clinical laboratory segment dominates with the largest market share in 2023. Hospital-based clinical laboratories in Europe are integral to healthcare systems, providing essential diagnostic services to support patient care, treatment decisions, and disease management. In the healthcare sector, hospital-associated laboratories are at the forefront for patients. Hospital settings are the primary contributors to clinical lab services, with the potential to deliver lab tests and diagnostics for outpatient and inpatient requirements and walk-in consumers looking to benefit from the facilities' clinical expertise after receiving the results, thus helping segmental growth.

REGIONAL ANALYSIS

Germany held the largest share, 18%, in the European clinical laboratory tests market in 2023. Germany's robust healthcare system and focus on research and innovation have positioned it as a leading market for cutting-edge diagnostic technologies.

Laboratory testing capacities in Germany were around 2.36 million tests per week in 2023, with only around 2,84,000 PCR tests performed in the last week of 2022. The average PCR test price amounted to $45.55 in 2022, 11% less than in 2021.

COMPETITIVE LANDSCAPE

The Europe clinical laboratory tests market report contains exclusive data on 36 vendors. The European market is highly competitive, and consolidation is expected to persist. Furthermore, more health system laboratories are expanding their reach and services, leading to heightened competition in clinical laboratory testing. This competition arises from physicians within these health systems and independent physicians operating within the service areas of these health system laboratories. Many healthcare provider organizations are consolidating to create integrated healthcare delivery systems with greater market power. The leading companies include Synlab, Sonic Healthcare, Unilabs, Cerba, SCM Biogroup, and Labcorp.

VENDORS LIST

Key Vendors
- Synlab
- Sonic Healthcare
- Unilabs
- Cerba HealthCare
- SCM BIOGROUP
- Labcorp

Other Prominent Vendors
- ACM Global Laboratories
- Quest Diagnostics
- Siemens Healthineers
- Genando
- Eurofins Scientific
- MLM Medical Labs
- Myriad Genetics
- Labor Berlin
- LKF Central Laboratories
- Genova Diagnostics
- Cyrex Labs
- Q2 Solutions
- Nelson Labs
- Centogene
- HCA Healthcare UK Laboratories
- Amedes
- Catlab
- Charles River
- Mayo Clinic Laboratories
- NADMED Laboratory
- Fresenius Medical Care
- Vall d'Hebron University Hospital
- Cambridge Clinical Laboratories
- Exeter Clinical Laboratory

- Newcastle Laboratories
- SIPMeL
- Medica Medizinische Laboratorien
- Bioexcel
- Alpine BioMedical
- UZ Leuven

SEGMENTATION & FORECAST

- By Test Complexity
o Specialty Laboratory Tests
o Routine Laboratory Tests
- By Test Type
o Clinical & Immunochemistry
o Molecular Diagnostics
o Hematology
o Microbiology & Cytology
o Toxicology
- By Providers
o Hospital-Based Laboratories
o Independence & Standard Reference Laboratories
o Others
- By Region
o Germany
o France
o Italy
o Spain
o UK

KEY QUESTIONS ANSWERED:

1. How big is the Europe clinical laboratory tests market?
2. Who are the major European clinical laboratory test market players?
3. What is the growth rate of the Europe clinical laboratory tests market?
4. What are the trends in the Europe clinical laboratory tests market?

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