Now more than ever, it’s critical to understand the industry at a macro level. Prepare your organization to compete in this difficult environment.
For the first time since G2 Intelligence began reporting on the clinical lab industry, it is contracting. This report details the causes, trends, and implications — and what solutions are being implemented by a range of organizations.

U.S. Clinical Laboratory and Pathology Testing 2013-2015:
Market Analysis, Trends, and Forecasts

G2 Intelligence’s all-new study builds upon — and replaces — the former biennial report, Laboratory Industry Strategic Outlook. With enriched content and improved rigor with respect to data analytics, it’s the industry handbook no laboratory executive should be without. Here’s why:

- It is the only report that provides data-driven, comprehensive business intelligence on the overall U.S. clinical and pathology laboratory testing industry.
- It forecasts market growth or contraction out to 2015, preparing laboratories of various sizes and types for potential opportunities and/or challenges ahead.
- It features never-before-reported data on hospital labs by facility size and type, including short-term acute care, children’s, long term care, and critical access.
- It provides valuable data on the molecular market, including next-generation sequencing, and rich analysis of the infectious disease segment — the largest in the molecular market.
- It offers helpful strategies for independent labs, with real-world insights from peer laboratories, and what they’re doing to adapt and succeed.
- It includes valuable analysis on the new lab outreach environment, including:
  - How the growing popularity of the physician-as-employee model threatens a historically important revenue stream
  - The need to find new client targets, such as employer wellness programs
- It covers key IT topics, with particular focus on labs’ technology and connectivity concerns.

### Laboratory Industry Revenue 2010-2015P ($ Billions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$66.9</td>
</tr>
<tr>
<td>2011</td>
<td>$70.3</td>
</tr>
<tr>
<td>2012</td>
<td>$76.1</td>
</tr>
<tr>
<td>2013P</td>
<td>$74.8</td>
</tr>
<tr>
<td>2014P</td>
<td></td>
</tr>
<tr>
<td>2015P</td>
<td></td>
</tr>
</tbody>
</table>

P = Projected
Midpoint estimates are displayed for 2014 and 2015.
Source: G2 Intelligence, Truven Health Analytics, CMS, American Hospital Directory®

Order your copy today! Click Here!
Featuring both qualitative and quantitative research, this exclusive study is comprised of the following:

- **Views from the Field** — found throughout the report, detailing experiences of peer laboratories, and what they are doing to adapt and compete in a changing marketplace.

- **Major Trends and Implications for Laboratories** — discusses key trends surrounding lower reimbursement, consumer health care, point-of-care testing, physician-as-employee, provider-payer convergence, and new payment and care delivery models.

- **Hospital Laboratory Sector** — provides proprietary market sizing and analysis of test volumes and revenues, and explores how market forces are shaping the future of this sector.

- **Independent Laboratory Sector** — includes a comprehensive look at market sizing, structure, and dynamics, plus key strategies for taking on the reimbursement and reform challenges ahead — and describes how to achieve a shift in the value proposition, while improving population health outcomes.

- **Molecular Diagnostic and Genomic Testing Market** — with health care market reform mandating a shift to value-based care, conflicting payment paradigms, and an increased demand for test transparency and evidence of clinical utility, get all the details on market size, projections, and analysis of selected MDx sectors.

- **Anatomic Pathology Market** — as doors for conducting business as usual close, new ones are opening. Learn more, while examining market size and structure, reimbursement update and outlook, M&A data, and prospects for the future.

- **Medicare and Medicaid** — a wealth of actionable intelligence on these increasingly complex programs, including overviews, spending trends, and key dynamics impacting the laboratory industry, plus payment reform, cost-cutting mandates, competitive bidding, and more.

- **Health Care Reform** — examines new reimbursement challenges and shifting payment methods, including new Medicare demonstrations of coordinated care delivery models aimed at improving quality and lowering costs. Plus, gain intelligence on the aggressive stance being taken by private payers.

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