

LaingBuisson Diagnostics UK market report predicts high ongoing growth

LaingBuisson has published the first edition of its Diagnostics UK market report. While imaging and pathology (defined here as all clinical lab services including cellular pathology) are very different disciplines, both are key to diagnostics, with doctors often relying on a combination of the two. Diagnostics are fundamental to healthcare - clinicians need to understand the condition they are treating in order to determine the best response, and early diagnosis is a key element for all healthcare systems to improve population health management and reduce costs with more effective early intervention.

Written in the run up to the Coronavirus crisis, the report offers a picture of a high value and growing market which makes it highly attractive to investors. While the current crisis will undoubtedly change the market's focus for the short-term, understanding its underlying dynamics and potential makes this report vital reading for investors, advisors, suppliers, commissioners and providers to the UK diagnostics market.

The report looks at the value and structure of the market in detail, and includes volume, value and pricing data by subsegment and sometimes by individual test going back to 2012. It shows significant growth in demand for imaging services such as MRI and CT scans, though price deflation is suppressing value growth. There is also growth for pathology tests, and a shift to higher cost tests and less downward pressure on prices means that value growth is for now outstripping volume.

The report finds that the UK undertakes per capita significantly fewer tests than the US, Germany and France. While it could be said these countries are over-diagnosing, it suggests that there remains significant scope for growth in the UK, given diagnostic tests are fundamental to clinicians' understanding of their patients' conditions and how best to treat them.

Prior to Coronavirus, the UK diagnostics market was attractive to investors, especially as it is, for the most part, underwritten by public money. There is no reason to believe, given the demand for diagnostics, that the market will not return to its expected growth trajectory once the crisis has passed. The question is what form this will take. While the trend has been away from outsourcing, private imaging companies currently account for around 15% of that market and, as the UK government promises investment in infrastructure, there lies opportunity in providing capacity.

This report is key reading for anyone in a decision-making role relating to the UK diagnostics market.

Who is the report for

- Hospital and Clinic C-Suite Professionals
- Specialist Diagnostics Providers
- Suppliers of Imaging and Pathology Equipment
- Private Medical Insurance Groups
- Clinical Commissioning Groups
- NHS Foundation Trusts
- Professional and Trade Associations
- Investors
- Banks
- Private Equity
- Central and Local Government
- Think Tanks
- Lawyers
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New for this latest edition, the *Review* looks in more detail at UK healthcare spending benchmarked against international comparators from the EU, G7 and OECD in the context of trends in global healthcare. As chosen provider of data on the UK independent healthcare sector to the Office for National

Statistics, LaingBuisson contributes market data that is in turn submitted to the OECD, WHO and Eurostat who combine it with their international datasets to benchmark UK spending against other nations.

This makes LaingBuisson's UK Healthcare Market Review vital reading not only for those independent providers but also commissioners, advisors and investors in the sector

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Report



Private Healthcare

The sixth edition of LaingBuisson's Private Acute Healthcare UK market report is vital reading for anyone involved in this highly competitive sector of the UK health economy, be they providers, investors or advisors to the sector.

The main conundrum is how to achieve growth as the market has contracted for the second year in a row. In real terms, these declines have been 2.1% in 2017 and 1.1% in 2018. Nevertheless, the market continues to attract a wealth of new entrants.

This important report provides a crucial update on the current position of the market and its key emerging trends.

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