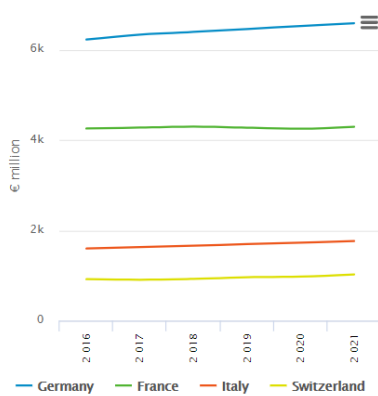


HBI Intelligence. Responsible for maintaining market size and growth data as well as the market overview, working with another research team to maintain company revenues.

Laboratory report:

Print PDF

Largest markets by country

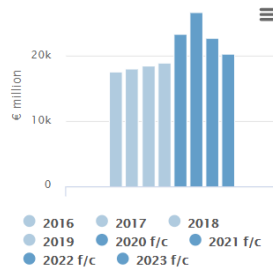


For-profit laboratory services market size 2019

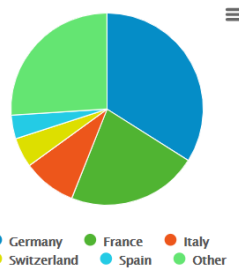
€19bn

Data generated using: Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Russia, South Africa, Spain, Sweden, Switzerland, Ukraine and United Kingdom

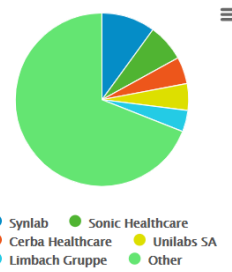
For-profit laboratory services growth



For-profit laboratory services by country



Top companies marketshare (2019)



HBI INTELLIGENCE Market share by Sub-Sector and Region

Business area:

Operating region/country:

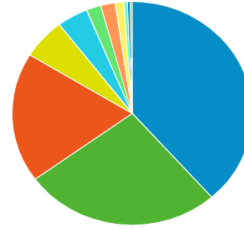
> Laboratory Services: Belgium

∨ Laboratory Services: Czech Republic

(Pre-COVID estimates in brackets)	2016	2017	2018	2019	2020 f/c	2021 f/c	2022 f/c	2023 f/c
Total market size (€m)	764	772	780	788	1,300			
For-profit sector (€m)	274	277	280	283	424 (286)	466 (289)	400 (292)	300 (295)
For-profit growth %	1%	1%	1%	1%	50% (1%)	10% (1%)	-14% (2%)	-25% (1%)
Public/non-profit sector (€m)	490	495	500	505	876			

Czech Republic: For-profit Laboratory Services market share of biggest operators

Rank	Company	2019 Revenue in this sub-sector	2019 Total revenue	market share %
1	Unilabs SA	€74.9m	€1.2bn	26%
2	Synlab	€53.2m	€2.1bn	18%
3	Spadia	€16.6m	€16.6m	5.9%
4	EUC Group (former Euroclinicum)	€11.8m	€91m	4.2%



Digital health report:

[See all operators](#)

France is relatively ahead on reimbursement for digital health tools: telehealth consultations have been reimbursed since September 2018, a scheme for telemonitoring is likely to be introduced in 2022 and a new amendment allows faster reimbursement for digital therapeutics.

We have increased our market size because we now add in all digital health tools, including doctor booking, which is a large market and in many instances indistinguishable from telehealth.

Telehealth / booking platforms

Remote consultations swelled in France under the pandemic, with over 17m reimbursements in 2020 and the French payor CNAM spending €430m in the process. At the peak of the first lockdown, it was reimbursing 1m teleconsultations a week, compared to just a few thousand before, with teleconsultations representing just over a quarter of all consultations.

It is reimbursed at the same rate as physical consultations of between €23-€58.50 depending on the speciality. Before the pandemic, CNAM paid 70% with the mutuelles paying the remainder but has since become fully reimbursable and will stay that way at least until the end of 2021.

The B2B model of providing the software to doctors has largely won over any B2C models as the tariff structure hugely favours a patient's own or local GP. Doctolib has become the clear frontrunner in adoption among doctors: it started as a booking platform, later adding telehealth once reimbursement started in 2018 and sells to 150,000 out of 200,000 doctors and 90,000 physiotherapists in France. The reimbursement model has left B2C players like Livi/Kry scrambling to scale.

We have categorised the €430m as the 'total market' because the majority is retained by liberal doctors and telehealth is provided as a software-as-a-service (SaaS). The for-profit market size is made up of revenues from SaaS sales and where the supplier can retain the reimbursement. As an example, Doctolib charges practitioners €129 per month for its booking software and with an additional €79 per month for telehealth tools, giving it estimated revenues of around €370m for 2020.

France is also the market that has been targeted by consolidators. America's largest telehealth player Teladoc Health bought MédicinDirect in 2019, which works primarily with employers and insurers while HealthHero has bought top-five player Qare.

Digital therapeutics

Digital therapeutics can be reimbursed under the framework used for medical devices: the IFRB (liste des Produits et Prestations

M&A pipeline. The examples below are decided by an algorithm based on ownership length but we have the responsibility to overwrite this where/when there is movement in the market. I've just worked on updating our algorithm to make it more accurate.

Estimated likelihood of a sale in the next 12 months

