




UPS Healthcare

SUPPLY CHAIN VITAL SIGNS

2022 Medical Labs Industry Study
Executive Summary





State of the industry The medical labs industry consists of medical and diagnostic laboratory services and related goods that provide diagnostics tests for various diseases, primarily diagnostic and medical labs. Specimen stability and viability are basic table stakes. The instant a sample is drawn, the clock starts ticking on its viability. Reliable transport and oversight through the supply chain ensures on-time delivery and a better patient experience.

**It's not a sample.
It's a somebody.**

Earlier delivery means faster test results and better outcomes for patients. Speed is also good medicine for operating efficiency. Wasted time means wasted money.

State of the industry

\$75.6B

Projected market size by 2027¹

31K

new labs, double those in 2019 (15,500)²

14B

diagnostic tests performed annually in the US³

70%+

of medical decisions depend on laboratory results⁴

41%

Number of supply chain executives who say packaging failure is a major supply chain challenge⁵

93%

Number of healthcare execs who say controlling supply chain and logistics costs are important⁵

SOURCES:

¹ IBIS World (October 2021) Diagnostic and Medical Laboratories in the US

² Chief Healthcare Executive, January 16, 2022

³ Centers for Disease Control

⁴ Centers for Disease Control

⁵ UPS Healthcare, October 2020

About the surveys

The UPS Healthcare Supply Chain Vital Signs survey is intended to provide the healthcare industry with insights into supply chain issues impacting pharmaceutical companies, medical device manufacturers and laboratories across the United States, Europe, Asia-Pacific and Latin America.

Timing

November 2021 to February 2022

Conducted independently by Worldwide Business Research Insights (WBR).

Methodology

Quantitative (November–December 2021, WBR Insights)

600 director level+ healthcare supply chain and logistics professionals across North America, Europe, the Middle East, Africa and the Asia Pacific region.

About this summary

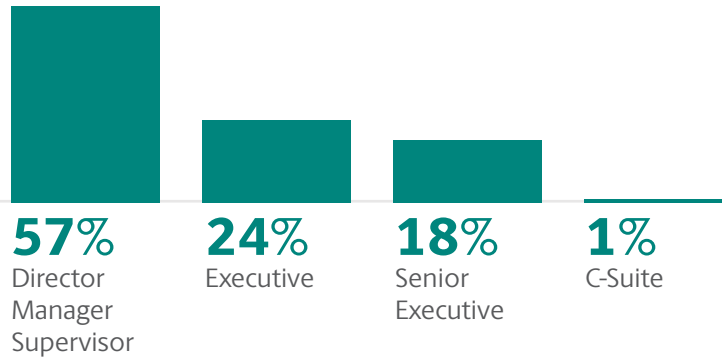
Subset of 66 medical labs executives and managers—from the WBR Insights quantitative group—with purchasing, supply chain or materials management responsibilities.



About the respondents

WBR INSIGHTS

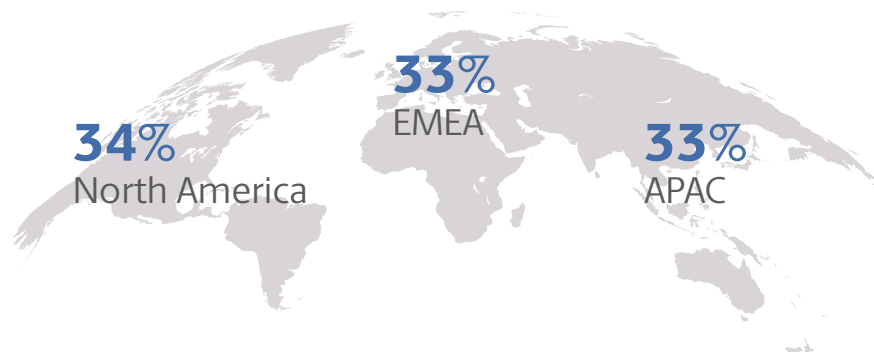
Seniority



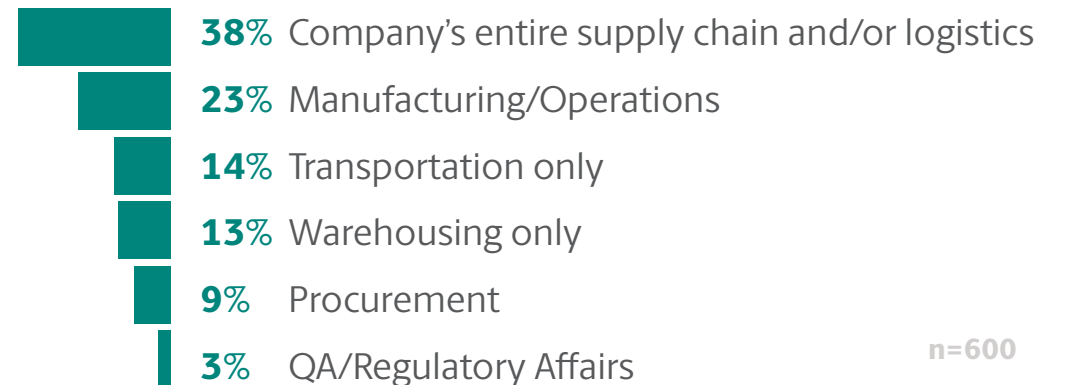
Company Size



Geography



Job Responsibility



n=600

OUR FINDINGS

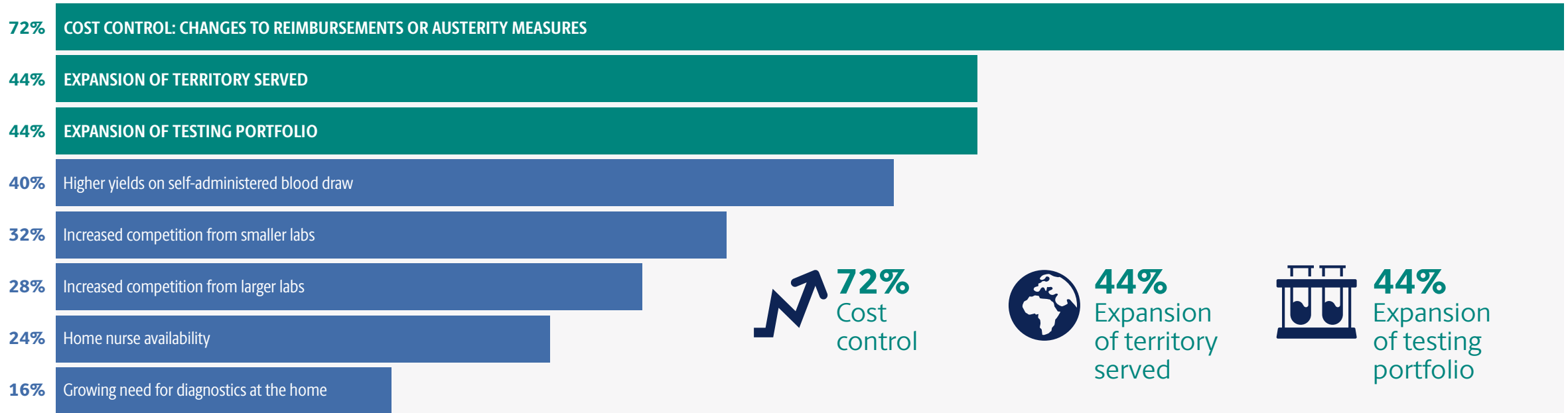
PRIORITIES AND CHALLENGES | WBR Insights Research



TOP SHORT-TERM STRATEGIC PRIORITIES

Q.

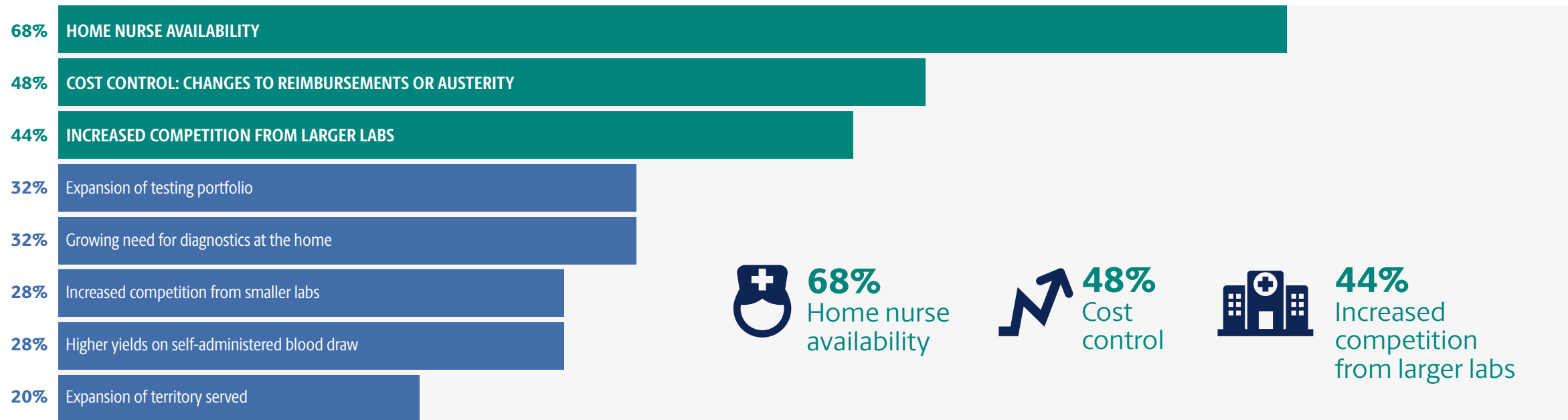
Among the following options, which are the top three strategic priorities to which you are paying the most attention for the next 1-2 years?



TOP LONG-TERM STRATEGIC PRIORITIES

Q.

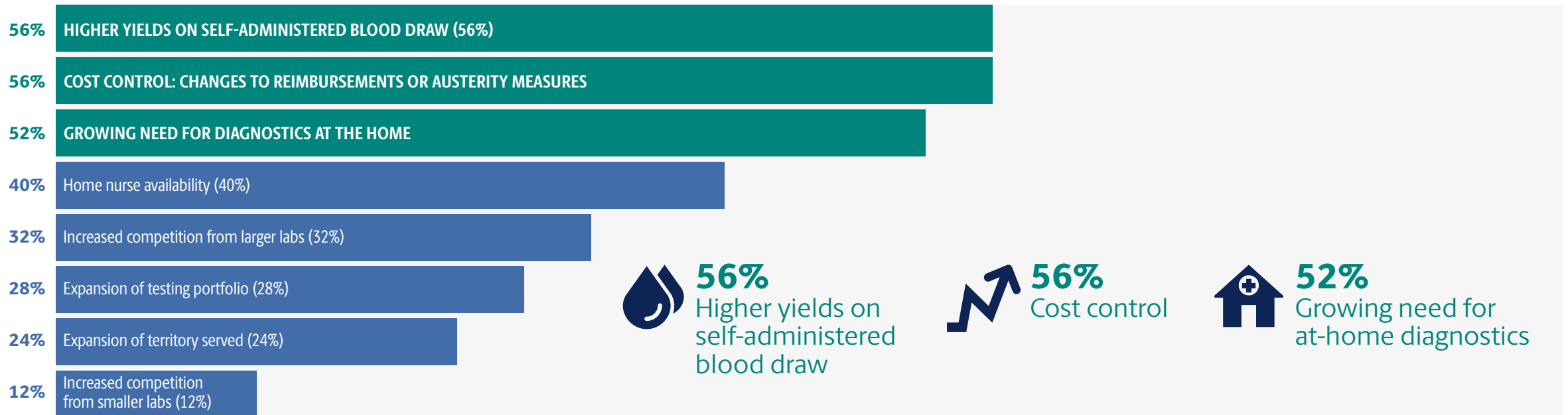
Among the following options, which are the top three strategic priorities to which you are paying the most attention for the next 5-10 years?



TOP SHORT-TERM CHALLENGES

Q.

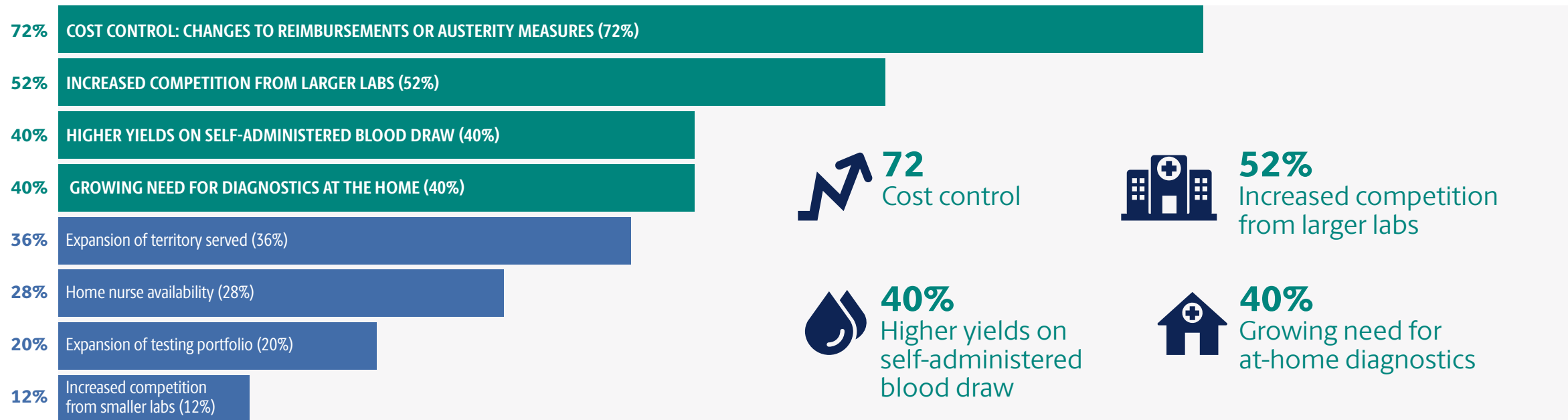
Among the following options, which are the top three challenges to which you are paying the most attention for the next 1-2 years?



TOP LONG-TERM CHALLENGES

Q.

Among the following options, which are the top three challenges to which you are paying the most attention for the next 5-10 years?



QUALITY MANAGEMENT SYSTEMS

Q.

In general, how well do you think 3PLs execute quality management systems?



59%

Parity to in-house
laboratory QMS

38%

Better than in-house
laboratory QMS

3%

Worse than in-house
laboratory QMS

n=600

HOW CAN UPS HEALTHCARE HELP?

Lab Kit Building Services

Make testing easier for clinicians and patients. We help organize and package your specimen collection components, inserts and compliant return labels.

Accelerated Turnaround Time (TAT)

With our reliable network of more than 950 global facilities, we can provide flexible options from late pick-ups to early-morning deliveries, that help you provide faster results and a better patient experience.

Specimen Stability

We offer highly visible thermal packaging with near real-time digital monitoring for a range of time and temperature requirements.

Specimen Visibility Platform

We've built a unique platform that can keep you connected to your clinics by giving you proactive alerts and visibility to diagnostic samples and the clinics they're linked to.

Advanced Contingency Planning

Our team can monitor pickup execution and lab shipment progress and will intervene with a configurable recovery protocol if any issues arise.

Clinical Onboarding Tools

Need help switching carriers? We will support your salesforce, supply chain team, and clinicians as you transition over.

Lab Partnerships

We have a collection of partnerships with labs offering proven solutions and capacity to meet any need.





UPS Healthcare

We'd love to learn more about your business needs.

Contact us to learn how a customized logistics plan could help position you for success.

ASK AN EXPERT

