

THE JAPANESE HEMATOLOGY AND FLOW CYTOMETRY MARKETS

Table of Contents

I. Introduction

II. Worldwide Market and Technology Overview

A. Major Routine and Special Hematology Tests

1. Introduction
2. CBC Analysis
 - a. Hemoglobin Concentration
 - b. Hematocrit Determination
 - c. Red Blood Cell Count
 - d. Red Cell Indices
 - ° MCV
 - ° RDW
 - ° MCHC
 - ° CHCM
 - ° HDW
 - ° MCH
 - e. Red Cell Size Histograms
 - f. Platelets
 - ° Platelet Count
 - ° Platelet Size/MPV
 - ° PDW
 - ° Automated Systems
 - g. Reticulocytes
3. White Blood Cell Analysis
 - a. WBC Count
 - b. Five-Partial Differential Major Suppliers
 - ° Abbott
 - ° Beckman Coulter/Danaher
 - ° Siemens
 - ° Sysmex
 - c. Pattern Recognition Systems
 - ° IRIS
 - d. Comparison of Major Differential Analyzers

Table of Contents (continued)

4. Reticulocytes
5. Platelet Function Tests
6. Erythrocyte Sedimentation Rate/CRP
7. Red Cell Analysis
8. 2, 3 DPG
9. Red Cell Deformability
10. Neutrophil Function Tests
11. Semen Analysis
12. Bone Marrow Analysis
13. Urinalysis

B. Major Flow Cytometry Applications

1. Cell Surface Markers
 - a. Lymphocyte Subclassification CD4/CD8
 - Instrumentation and Reagent Test Kits
 - * BD
 - * Beckman Coulter/Danaher
 - * T Cells Diagnostics
 - b. Other Cell Markers
2. DNA Content Analysis
3. RNA Content Analysis
4. Chemotherapy Monitoring
5. Cell Cycle Analysis
6. Chromosome Analysis
7. Fetal Cell Analysis
8. HLA Typing
9. Microbiology
10. Protein Content Analysis
11. Multiparameter Analysis
12. Other Applications

C. Instrumentation Review

1. Hematology Analyzers
 - a. Overview
 - Electrical Aperture-Impedance Analyzers
 - Light Scatter Analyzers
 - b. System Review
 - Abbott
 - Beckman Coulter/Danaher
 - Biocode Hycel

Table of Contents (continued)

- Drew-Scientific
 - Horiba
 - Menarini
 - Nihon Kohden
 - Siemens
 - Sysmex
 - 2. Flow Cytometers
 - a. Introduction
 - b. System Overview
 - Becton Dickinson
 - Beckman Coulter/Danaher
 - 3. Platelet Aggregometers
 - 4. Sedimentation Rate Analyzers
 - DIESSE Ves Matic
 - Polymedco
- D. Current Market Needs and Future Demand For Hematology Analyzers**
- E. Reagents and Controls**
- F. Current and Emerging Technologies**
- 1. Information Technologies
 - 2. Automation and Robotics
 - 3. Lasers
 - 4. Artificial Intelligence
 - 5. Monoclonal Antibodies
 - 6. Molecular Diagnostics
 - 7. Microdrop Technology

VI. Japan

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth and Major Suppliers'
Instrument Placements, Installed Base,
Sales and Market Shares

Table of Contents (continued)

X. Major Product Development Opportunities

- A. Instrumentation
- B. Reagent Kits and Test Systems/Panels
- C. Information Technology
- D. Auxiliary Products

XI. Design Criteria for Decentralized Testing Products

XII. Alternative Market Penetration Strategies

- A. Internal Development
- B. Collaborative Arrangements
- C. University Contracts
- D. Distribution Strategies for the Decentralized Testing Markets
 - 1. Four Marketing Approaches
 - 2. Product Complexity Factor
 - 3. Customer Preference Factor
 - 4. Established Suppliers
 - 5. Emerging Suppliers
 - 6. Major Types of Distributors
 - 7. Market Segmentation Factor

XIII. Potential Market Entry Barriers and Risks

- A. Market Maturity
- B. Cost Containment
- C. Competition
- D. Technological Edge and Limitations
- E. Patent Protection
- F. Regulatory Constraints
- G. Decentralized Testing Market Challenges

XIV. Competitive Assessments

- Abbott
- Beckman Coulter/Danaher
- Becton Dickinson
- Bio-Rad

Table of Contents (continued)

- CellaVision
- Dako
- Horiba
- Iris
- Nihon Kohden
- Ortho-Clinical Diagnostics
- Roche
- Siemens
- Sysmex

XV. Appendix: Major Universities and Research
Centers Developing Hematology/Flow Cytometry
Technologies and Applications

List of Tables

Summary Table I: Japan, All Market Segments,
Total Hematology and Flow Cytometry Specimen Volume Forecast

Summary Table II: Japan, All Market Segments,
Total Hematology and Flow Cytometry Test Volume
Forecast

Summary Table III: Japan, All Market Segments,
Total Hematology and Flow Cytometry Market Forecast

Japan, Laboratories Performing Hematology and
Flow Cytometry Testing By Market Segment

Japan, Hospital Laboratories Performing
Hematology/Flow Cytometry Tests By Bed Size

Japan, Commercial/Private Laboratories
Performing Hematology/Flow Cytometry Tests
By Annual Test Volume

Japan, Total Routine Hematology Specimen
Volume Forecast By Market Segment

Japan, Total Flow Cytometry and Special
Hematology Specimen Volume Forecast By Market Segment

Japan, Hospital Laboratories, Hematology
And Flow Cytometry Specimen Volume Forecast

Japan, Commercial/Private Laboratories,
Hematology and Flow Cytometry Specimen Volume Forecast

Japan, Total Routine Hematology Test Volume Forecast
By Market Segment

Japan, Total Flow Cytometry and Special
Hematology Test Volume Forecast By Market Segment

Japan, All Market Segments, Total Routine
Hematology Test Volume Forecast

List of Tables (continued)

Japan, Hospital Laboratories, Routine Hematology Test Volume Forecast

Japan, Commercial/Private Laboratories Routine Hematology Test Volume Forecast

Japan, All Market Segments, Total Flow Cytometry and Special Hematology Test Volume Forecast

Japan, Hospital Laboratories, Flow Cytometry and Special Hematology Test Volume Forecast

Japan, Commercial/Private Laboratories, Flow Cytometry And Special Hematology Test Volume Forecast

Japan, Major Hematology Analyzers, Estimated Placements and Installed Base

Japan, Major Flow Cytometers, Estimated Placements and Installed Base

Japan, Total Hematology Market Forecast By Market Segment

Japan, Hematology Instrument Market Forecast By Market Segment

Japan, Hematology Consumable Market Forecast By Market Segment

Japan, Total Flow Cytometry Market Forecast By Market Segment

Japan, Flow Cytometry Consumable Market Forecast By Market Segment

Japan, Flow Cytometry Instrument Market Forecast By Market Segment

Japan, Total Hematology Diagnostics Market By Major Supplier

List of Tables (continued)

Japan, Hematology Instrument Market
By Major Supplier

Japan, Hematology Consumable Market
By Major Supplier

Japan, Total Flow Cytometry Market
By Major Supplier

Japan, Total Flow Cytometry Consumables Market
By Major Supplier

Japan, Total Flow Cytometry Instrument Market
By Major Supplier