# New Frontiers in Point-of-Care/POC Hematology and Flow Cytometry Testing: Business Challenges, Emerging Technologies, Competitive Landscape

#### **Table of Contents**

#### Introduction

## **Executive Summary**

## **Rationale for Testing Decentralization**

- 1. Overview
- 2. Regulatory Trends
- 3. Economic Trends
- 4. Demographic Trends
- 5. Technological Trends
- 6. Social Trends
- 7. Quality of Care
- 8. Defensive Medicine
- 9. Quality Control Issues

# Major Routine and Special Hematology Tests

- 1. CBC Analysis
  - a. Hemoglobin Concentration
  - b. Hematocrit Determination
  - c. Red Blood Cell Count
  - d. Platelets

## <u>Instrumentation: Hematology Analyzers Manufactured by:</u>

- Abbott
- Becton Dickinson
- Beckman Coulter/Danaher
- Biocode
- Drew-Scientific
- Diesse Ves Matic
- Horiba
- Menarini
- Nihon Kohden
- Polymedco
- Sysmex

# **Current and Emerging Technologies**

- 1. Monoclonal Antibodies
- 2. Immunoassays
  - a. Technological Principle
  - b. Enzyme Immunoassays (EIA)
    - ? Overview
    - ? ELISA
    - ? Dot Immunobinding Assays
  - ? Capillary Immunoassays
  - ? Particle-Membrane Capture Immunoassay
  - ? Enzyme Amplification
  - c. Fluorescent Immunoassays
  - ? Fluorescent Polarization
  - ? Time-Resolved Pulse Fluorescence
  - d. Luminescence
  - ? Chemiluminescence
  - ? Bioluminescence
  - e. Latex Agglutination
  - f. Immunoprecipitation
- 3. Dry Chemistry
- 4. Biosensors
- 5. IT and Automation
- 6. Molecular Diagnostics
  - a. Technology Overview
  - b. Amplification Methods
    - ? Polymerase Chain Reaction
    - ? Ligase Chain Reaction
    - ? Branched DNA
    - ? Q-Beta Replicase
    - ? Strand Displacement Activation
    - ? Self-Sustained Sequence Replicase

#### U.S.A.

- A. Market Overview
  - 1. Business Environment
    - a. Health Care Expenditures
    - b. Cost Consciousness
    - c. Reimbursement

- d. Industry Consolidation
- e. Managed Care
- ? PPO
- ? HMO
- f. Hospitals
- g. Admissions
- h. Length of Stay
- i. Industry Diversification
- j. Physician Demographics
- k. Aging Population
  - ? More Chronic Illness
  - ? Disease Incidence
  - ? Susceptibility to latrogenesis
  - ? Multiple Illnesses Cases
- I. Laboratory Regulations
- 2. Market Structure
  - a. Hospitals
  - b. Commercial/Private Laboratories
- B. Physician Offices/Group Practices
  - 1. Market Summary
  - 2. Market Structure
  - 3. Test Volume and Sales Forecasts
- C. Ancillary Hospital Locations
  - 1. Introduction
    - a. Emergency Departments
    - b. Operating Suites
    - c. Intensive Care Units
  - 2. Emergency Departments
    - a. Market Summary
    - b. Test volume and Sales Forecasts
  - 3. Operating and Recovery Suites
    - a. Market Summary
    - b. Test Volume and Sales Forecasts
  - 4. ICUs/CCUs
    - a. Market Summary
    - b. Test Volume and Sales Forecasts
- D. Cancer Clinics
  - 1. Introduction
  - 2. Market Summary
  - 3. Test Volume and Sales Forecasts

- E. Ambulatory Care Centers
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- F. Surgery Centers
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- G. Nursing Homes
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- H. Birth Centers
  - 1. Introduction
  - 2. Market Summary
  - 3. Market Structure
  - 4. Test Volume and Sales Forecasts
- Major Suppliers' Instrument Placements,
   Installed Base, Instrument and Consumables Sales, and Market Shares

#### **Germany**

- A. Market Overview
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Instrument and Consumables Sales, and Market Shares

#### <u>Spain</u>

- A. Business Environment
- B. Market Structure
- C. Market Summary
- D. Test Volume and Sales Forecasts
- E. Major Suppliers' Instrument Placements, Installed Base, Instrument and Consumables Sales, and Market Shares

## **Major Product Development Opportunities**

#### **Design Criteria for Decentralized Testing Products**

#### **Alternative Market Penetration Strategies**

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

#### **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

#### **Company Profile**

- Abbott
- Agilent Technologies
- Beckman Coulter/Danaher
- Becton Dickinson
- Bio-Rad
- CellaVision

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

#### **List of Tables**

- U.S.A., Physician Office/Group Practice Laboratories Forecast by Practice Size
- U.S.A., Physician Offices/Group Practices Forecast by Type
- U.S.A., Office-Based Physicians Forecast by Practice Type
- U.S.A., Physician Offices/Group Practices Routine Hematology Test Volume Forecast
- U.S.A., Physician Offices Laboratories Flow Cytometry and Special Hematology Test Volume Forecast
- U.S.A., Physician Offices/Group Practices Hematology and Flow Cytometry Test Volume Forecast by Practice Type
- U.S.A., Physician Offices/Group Practices
  Hematology and Flow Cytometry Consumables
  Market Forecast
- U.S.A., Ancillary Hospital Locations Estimated Number
- U.S.A., Ancillary Hospital Locations Annual Utilization
- U.S.A., Hospital Emergency Departments Routine Hematology Test Volume Forecast
- U.S.A., Hospital Emergency Departments Hematology Reagent Market Forecast
- U.S.A., Hospital Operating and Recovery Suites Routine Hematology Test Volume Forecast
- U.S.A., Hospital Operating and Recovery Suites Hematology Reagent Market Forecast
- U.S.A., Hospital ICUs/CCUs Routine Hemagology Test Volume Forecast

U.S.A., Hospital ICUs/CCUs Hematology Reagent Market Forecast

U.S.A., Cancer Clinics Routine Hematology/Flow Cytometry Test Volume Forecast

U.S.A., Cancer Clinics Hematology and Flow Cytometry Reagent Market Forecast

U.S.A., Ambulatory Care Centers Estimated Number of Facilities and Patient Visits

U.S.A., Ambulatory Care Centers Most Frequent Diagnoses

U.S.A., Ambulatory Care Centers Routine Hematology Test Volume Forecast

U.S.A., Ambulatory Care Centers Hematology Reagent Market Forecast

U.S.A., Surgery Centers Most Frequently Performed Procedures

U.S.A., Surgery Centers Routine Hematology Test Volume Forecast

U.S.A., Surgery Centers Hematology Consumable Market Forecast

U.S.A., Nursing Homes Estimated Number of Facilities, Beds and Occupancy Rate

U.S.A., Nursing Homes Routine Hematology Test Volume Forecast

U.S.A., Nursing Homes Hematology Reagent Market Forecast

U.S.A., Birth Centers Facilities, Patient Visits, and Births

U.S.A., Birth Centers Routine Hematology Test Volume Forecast

U.S.A., Birth Centers Hematology Reagent Market Forecast

U.S.A., Hematology Analyzers
Estimated Placements and Installed Base

U.S.A., Flow Cytometers
Estimated Placements and Installed Base

U.S.A., Hematology Diagnostics Market Estimated Market Shares of Major Suppliers

U.S.A., Hematology Instrument Market Estimated Market Shares of Major Suppliers

U.S.A., Hematology Consumable Market Estimated Market Shares of Major Suppliers

U.S.A., Flow Cytometry Diagnostics Market Estimated Market Shares of Major Suppliers

U.S.A., Flow Cytometry Consumable Market Estimated Market Shares of Major Suppliers

U.S.A., Flow Cytometry Instruments Market Estimated Market Shares of Major Suppliers

Germany, Laboratory Performing Diagnostic Tests by Market Segment

Germany, Physician Offices Laboratories Routine Hematology Test Volume Forecast

Germany, Major Hematology Analyzers Estimated Placements and Installed Base

Germany, Major Flow Cytometers
Estimated Placements and Installed Base

Germany, Hematology Diagnostics Market Market Shares of Major Suppliers

Germany, Hematology Instrument Market Market Shares of Major Suppliers

Germany, Hematology Consumable Market Market Shares of Major Suppliers

Germany, Flow Cytometry Diagnostics Market Market Shares of Major Suppliers

Germany, Flow Cytometry Instrument Market Market Shares of Major Suppliers

Spain, Laboratory Performing Hematology And Flow Cytometry Tests by Market Segment

Spain, Ambulatory Care Centers Routine Hematology Test Volume Forecast

Spain, Ambulatory Care Centers Flow Cytometry and Special Hematology Test Volume Forecast

Spain, Major Hematology Analyzers
Estimated Placements and Installed Base

Spain, Major Flow Cytometers
Estimated Placements and Installed Base

Spain, Hematology Diagnostics Market Market Shares of Major Suppliers

Spain, Hematology Consumables Market Market Shares of Major Suppliers

Spain, Hematology Instrument Market Market Shares of Major Suppliers

Spain, Flow Cytometry Diagnostics Market Market Shares of Major Suppliers

Spain, Flow Cytometry Consumables Market Market Shares of Major Suppliers

Spain, Flow Cytometry Instrument Market Market Shares of Major Suppliers