

# Table of Contents



*Thousands of corporations worldwide are relying on our market intelligence, expert analysis, and strategic insight, critical to the development and implementation of effective business, R&D and marketing programs.*

[www.LeadingMarketResearch.com](http://www.LeadingMarketResearch.com)

[www.VPGMarketResearch.com](http://www.VPGMarketResearch.com)

[reports@vpgcorp.com](mailto:reports@vpgcorp.com)

+1 212 564 2838

## **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

### **Instrumentation: Hematology Analyzers Manufactured by:**

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

## **Table of Contents (continued)**

### **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

## **Table of Contents (continued)**

- 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 Iatrogenesis
  - Multiple Illnesses Cases
- l. 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

## **Table of Contents (continued)**

- 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
- I. 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

## **Table of Contents (continued)**

### **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**

The report provides strategic assessments of over 15 leading hematology and flow cytometry market players and start-up companies with innovative technologies and products, including:

- Abbott
- Agilent Technologies
- Beckman Coulter/Danaher
- Becton Dickinson
- Bio-Rad
- CellaVision
- Horiba
- Nihon Kohden
- Ortho-Clinical Diagnostics
- Roche
- Sekisui Diagnostics
- Siemens Healthineers
- Sysmex and others

## **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 Hematology Test Volume Forecast

## **List of Tables (continued)**

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



## **List of Tables (continued)**

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