

Global Automatic Blood Smear Preparation Instrument Market Growth 2026-2032

<https://marketpublishers.com/r/G31E94C1BFAAEN.html>

Date: July 2026

Pages: 80

Price: US\$ 3,660.00 (Single User License)

ID: G31E94C1BFAAEN

Abstracts

The global Automatic Blood Smear Preparation Instrument market size is predicted to grow from US\$ 189 million in 2025 to US\$ 299 million in 2032; it is expected to grow at a CAGR of 6.7% from 2026 to 2032.

Automatic blood smear preparation instruments are automated laboratory devices used for preparing standardized peripheral blood and selected bone marrow smears in clinical hematology laboratories. They typically perform blood mixing, sample dispensing, mechanical smearing, slide identification, drying, fixation and staining to generate slides for microscopic review or digital morphology analysis. Upstream inputs mainly include precision motion modules, stepper motors, sampling probes, spreader mechanisms, slide loading and transfer systems, barcode recognition and printing modules, staining fluidics, pumps and valves, sensors, control boards, touch panels, metal structures, plastic consumables and software control systems. Downstream customers include hospital clinical laboratories, hematology departments, independent clinical laboratories, regional testing centers, hematology specialty hospitals and research or teaching institutions. On an ex-factory basis, global nominal capacity in 2025 is estimated at about 4,800 units, with actual sales volume of approximately 3,260 units and a blended average ex-factory price of around USD 59,100 per unit. Industry gross margin is generally estimated at 42%-62%.

The current market for automated blood smear maker-stainers mainly serves medium- and high-throughput hematology laboratories, with demand concentrated in large hospital clinical laboratories, hematology specialty hospitals, independent clinical laboratories and regional testing centers. As complete blood count volumes rise and abnormal sample review demand increases, laboratories require more consistent, traceable and labor-efficient blood smear preparation. Manual smearing is highly

dependent on operator experience and can be affected by sample condition, spreader angle, smear speed and staining conditions. As a result, automated systems are gaining value in high-throughput settings. This market usually develops together with hematology analyzers, laboratory information systems and digital morphology platforms rather than as a fully standalone equipment category.

From a competitive perspective, the global market is mainly led by companies with hematology automation platform capabilities, and these instruments are often introduced into laboratories as part of hematology analyzer lines or abnormal sample review workflows. Leading suppliers build strong customer stickiness through hematology analyzer installed bases, distribution networks, software interfaces and integrated laboratory solutions. Because automated smear maker-stainers need to match sample racks, barcode systems, staining workflows, reflex review rules and laboratory information systems, customers usually place more emphasis on the stability of the whole workflow than on standalone instrument pricing. Smaller systems mainly serve laboratories with lower sample volumes or limited automation budgets, focusing on standardized smear quality, simplified operation and easier maintenance.

Future development will focus on intelligent parameter control, connected automation, digital morphology pre-processing and full sample traceability. High-end systems will increasingly adjust sample volume, spreader angle, smear speed and staining protocols according to hematocrit, sample viscosity, abnormal flags and reflex review rules, improving the consistency of film thickness, monolayer areas and feathered edges. Connectivity with hematology analyzers, laboratory automation lines, digital microscopy systems and AI-assisted morphology platforms will become tighter. As a result, blood smear preparation will move from a single mechanical step toward a standardized pre-analytical process that is recordable, traceable and optimizable.

Market growth is mainly driven by increasing hematology testing volumes, more standardized abnormal sample review workflows, staffing pressure in clinical laboratories, the need to reduce variation in manual smearing and the adoption of digital blood cell morphology systems. At the same time, the industry faces constraints such as the high price of premium systems, insufficient review volumes in some primary hospitals, strong linkage with specific hematology analyzer platforms, sensitivity to staining reagent and maintenance costs, and continued reliance on skilled technicians for manual smearing in some laboratories. Overall, this market will not achieve the same broad standalone penetration as hematology analyzers, but it will maintain steady upgrade demand in medium- and high-throughput laboratories, hematology specialty settings and digital morphology workflows.

LP Information, Inc. (LPI) ' newest research report, the "Automatic Blood Smear Preparation Instrument Industry Forecast" looks at past sales and reviews total world Automatic Blood Smear Preparation Instrument sales in 2025, providing a comprehensive analysis by region and market sector of projected Automatic Blood Smear Preparation Instrument sales for 2026 through 2032. With Automatic Blood Smear Preparation Instrument sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Automatic Blood Smear Preparation Instrument industry.

This Insight Report provides a comprehensive analysis of the global Automatic Blood Smear Preparation Instrument landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Automatic Blood Smear Preparation Instrument portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Automatic Blood Smear Preparation Instrument market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Automatic Blood Smear Preparation Instrument and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Automatic Blood Smear Preparation Instrument.

This report presents a comprehensive overview, market shares, and growth opportunities of Automatic Blood Smear Preparation Instrument market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Fully Automatic

Semi-automatic

Segmentation by Throughput:

Low-Throughput Systems (Below 30 Slides/hour)

Medium-Throughput Systems (30-75 Slides/hour)

High-Throughput Systems (Above 75 Slides/hour)

Segmentation by Sample Type:

Venous Whole Blood

Capillary Blood

Other

Segmentation by Application:

Hospital

Independent Clinical Laboratories

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its

market penetration.

Sysmex

Beckman Coulter

HORIBA

Mindray

CellaVision

Key Questions Addressed in this Report

What is the 10-year outlook for the global Automatic Blood Smear Preparation Instrument market?

What factors are driving Automatic Blood Smear Preparation Instrument market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Automatic Blood Smear Preparation Instrument market opportunities vary by end market size?

How does Automatic Blood Smear Preparation Instrument break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Automatic Blood Smear Preparation Instrument Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Automatic Blood Smear Preparation Instrument by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Automatic Blood Smear Preparation Instrument by Country/Region, 2021, 2025 & 2032

2.2 Automatic Blood Smear Preparation Instrument Segment by Type

- 2.2.1 Fully Automatic
- 2.2.2 Semi-automatic
- 2.2.3 Automatic Blood Smear Preparation Instrument Sales by Type
 - 2.2.3.1 Global Automatic Blood Smear Preparation Instrument Sales Market Share by Type (2021-2026)
 - 2.2.3.2 Global Automatic Blood Smear Preparation Instrument Revenue and Market Share by Type (2021-2026)
 - 2.2.3.3 Global Automatic Blood Smear Preparation Instrument Sale Price by Type (2021-2026)

2.3 Automatic Blood Smear Preparation Instrument Segment by Throughput

- 2.3.1 Low-Throughput Systems (Below 30 Slides/hour)
- 2.3.2 Medium-Throughput Systems (30-75 Slides/hour)
- 2.3.3 High-Throughput Systems (Above 75 Slides/hour)
- 2.3.4 Automatic Blood Smear Preparation Instrument Sales by Throughput
 - 2.3.4.1 Global Automatic Blood Smear Preparation Instrument Sales Market Share by Throughput (2021-2026)
 - 2.3.4.2 Global Automatic Blood Smear Preparation Instrument Revenue and Market

Share by Throughput (2021-2026)

2.3.4.3 Global Automatic Blood Smear Preparation Instrument Sale Price by Throughput (2021-2026)

2.4 Automatic Blood Smear Preparation Instrument Segment by Sample Type

2.4.1 Venous Whole Blood

2.4.2 Capillary Blood

2.4.3 Other

2.4.4 Automatic Blood Smear Preparation Instrument Sales by Sample Type

2.4.4.1 Global Automatic Blood Smear Preparation Instrument Sales Market Share by Sample Type (2021-2026)

2.4.4.2 Global Automatic Blood Smear Preparation Instrument Revenue and Market Share by Sample Type (2021-2026)

2.4.4.3 Global Automatic Blood Smear Preparation Instrument Sale Price by Sample Type (2021-2026)

2.5 Automatic Blood Smear Preparation Instrument Segment by Application

2.5.1 Hospital

2.5.2 Independent Clinical Laboratories

2.5.3 Other

2.5.4 Automatic Blood Smear Preparation Instrument Sales by Application

2.5.4.1 Global Automatic Blood Smear Preparation Instrument Sale Market Share by Application (2021-2026)

2.5.4.2 Global Automatic Blood Smear Preparation Instrument Revenue and Market Share by Application (2021-2026)

2.5.4.3 Global Automatic Blood Smear Preparation Instrument Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Automatic Blood Smear Preparation Instrument Breakdown Data by Company

3.1.1 Global Automatic Blood Smear Preparation Instrument Annual Sales by Company (2021-2026)

3.1.2 Global Automatic Blood Smear Preparation Instrument Sales Market Share by Company (2021-2026)

3.2 Global Automatic Blood Smear Preparation Instrument Annual Revenue by Company (2021-2026)

3.2.1 Global Automatic Blood Smear Preparation Instrument Revenue by Company (2021-2026)

3.2.2 Global Automatic Blood Smear Preparation Instrument Revenue Market Share

by Company (2021-2026)

3.3 Global Automatic Blood Smear Preparation Instrument Sale Price by Company

3.4 Key Manufacturers Automatic Blood Smear Preparation Instrument Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Automatic Blood Smear Preparation Instrument Product Location Distribution

3.4.2 Players Automatic Blood Smear Preparation Instrument Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AUTOMATIC BLOOD SMEAR PREPARATION INSTRUMENT BY GEOGRAPHIC REGION

4.1 World Historic Automatic Blood Smear Preparation Instrument Market Size by Geographic Region (2021-2026)

4.1.1 Global Automatic Blood Smear Preparation Instrument Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Automatic Blood Smear Preparation Instrument Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Automatic Blood Smear Preparation Instrument Market Size by Country/Region (2021-2026)

4.2.1 Global Automatic Blood Smear Preparation Instrument Annual Sales by Country/Region (2021-2026)

4.2.2 Global Automatic Blood Smear Preparation Instrument Annual Revenue by Country/Region (2021-2026)

4.3 Americas Automatic Blood Smear Preparation Instrument Sales Growth

4.4 APAC Automatic Blood Smear Preparation Instrument Sales Growth

4.5 Europe Automatic Blood Smear Preparation Instrument Sales Growth

4.6 Middle East & Africa Automatic Blood Smear Preparation Instrument Sales Growth

5 AMERICAS

5.1 Americas Automatic Blood Smear Preparation Instrument Sales by Country

5.1.1 Americas Automatic Blood Smear Preparation Instrument Sales by Country (2021-2026)

5.1.2 Americas Automatic Blood Smear Preparation Instrument Revenue by Country

(2021-2026)

5.2 Americas Automatic Blood Smear Preparation Instrument Sales by Type

(2021-2026)

5.3 Americas Automatic Blood Smear Preparation Instrument Sales by Application

(2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Automatic Blood Smear Preparation Instrument Sales by Region

6.1.1 APAC Automatic Blood Smear Preparation Instrument Sales by Region

(2021-2026)

6.1.2 APAC Automatic Blood Smear Preparation Instrument Revenue by Region

(2021-2026)

6.2 APAC Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026)

6.3 APAC Automatic Blood Smear Preparation Instrument Sales by Application

(2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Automatic Blood Smear Preparation Instrument by Country

7.1.1 Europe Automatic Blood Smear Preparation Instrument Sales by Country

(2021-2026)

7.1.2 Europe Automatic Blood Smear Preparation Instrument Revenue by Country

(2021-2026)

7.2 Europe Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026)

7.3 Europe Automatic Blood Smear Preparation Instrument Sales by Application

(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Automatic Blood Smear Preparation Instrument by Country

8.1.1 Middle East & Africa Automatic Blood Smear Preparation Instrument Sales by Country (2021-2026)

8.1.2 Middle East & Africa Automatic Blood Smear Preparation Instrument Revenue by Country (2021-2026)

8.2 Middle East & Africa Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026)

8.3 Middle East & Africa Automatic Blood Smear Preparation Instrument Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Automatic Blood Smear Preparation Instrument

10.3 Manufacturing Process Analysis of Automatic Blood Smear Preparation Instrument

10.4 Industry Chain Structure of Automatic Blood Smear Preparation Instrument

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

- 11.1.1 Direct Channels
- 11.1.2 Indirect Channels
- 11.2 Automatic Blood Smear Preparation Instrument Distributors
- 11.3 Automatic Blood Smear Preparation Instrument Customer

12 WORLD FORECAST REVIEW FOR AUTOMATIC BLOOD SMEAR PREPARATION INSTRUMENT BY GEOGRAPHIC REGION

- 12.1 Global Automatic Blood Smear Preparation Instrument Market Size Forecast by Region
 - 12.1.1 Global Automatic Blood Smear Preparation Instrument Forecast by Region (2027-2032)
 - 12.1.2 Global Automatic Blood Smear Preparation Instrument Annual Revenue Forecast by Region (2027-2032)
- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Automatic Blood Smear Preparation Instrument Forecast by Type (2027-2032)
- 12.7 Global Automatic Blood Smear Preparation Instrument Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

- 13.1 Sysmex
 - 13.1.1 Sysmex Company Information
 - 13.1.2 Sysmex Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications
 - 13.1.3 Sysmex Automatic Blood Smear Preparation Instrument Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.1.4 Sysmex Main Business Overview
 - 13.1.5 Sysmex Latest Developments
- 13.2 Beckman Coulter
 - 13.2.1 Beckman Coulter Company Information
 - 13.2.2 Beckman Coulter Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications
 - 13.2.3 Beckman Coulter Automatic Blood Smear Preparation Instrument Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Beckman Coulter Main Business Overview

13.2.5 Beckman Coulter Latest Developments

13.3 HORIBA

13.3.1 HORIBA Company Information

13.3.2 HORIBA Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

13.3.3 HORIBA Automatic Blood Smear Preparation Instrument Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 HORIBA Main Business Overview

13.3.5 HORIBA Latest Developments

13.4 Mindray

13.4.1 Mindray Company Information

13.4.2 Mindray Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

13.4.3 Mindray Automatic Blood Smear Preparation Instrument Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Mindray Main Business Overview

13.4.5 Mindray Latest Developments

13.5 CellaVision

13.5.1 CellaVision Company Information

13.5.2 CellaVision Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

13.5.3 CellaVision Automatic Blood Smear Preparation Instrument Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 CellaVision Main Business Overview

13.5.5 CellaVision Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Automatic Blood Smear Preparation Instrument Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Automatic Blood Smear Preparation Instrument Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Fully Automatic

Table 4. Major Players of Semi-automatic

Table 5. Global Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026) & (Units)

Table 6. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Type (2021-2026)

Table 7. Global Automatic Blood Smear Preparation Instrument Revenue by Type (2021-2026) & (\$ million)

Table 8. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Type (2021-2026)

Table 9. Global Automatic Blood Smear Preparation Instrument Sale Price by Type (2021-2026) & (US\$/Unit)

Table 10. Major Players of Low-Throughput Systems (Below 30 Slides/hour)

Table 11. Major Players of Medium-Throughput Systems (30-75 Slides/hour)

Table 12. Major Players of High-Throughput Systems (Above 75 Slides/hour)

Table 13. Global Automatic Blood Smear Preparation Instrument Sales by Throughput (2021-2026) & (Units)

Table 14. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Throughput (2021-2026)

Table 15. Global Automatic Blood Smear Preparation Instrument Revenue by Throughput (2021-2026) & (\$ million)

Table 16. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Throughput (2021-2026)

Table 17. Global Automatic Blood Smear Preparation Instrument Sale Price by Throughput (2021-2026) & (US\$/Unit)

Table 18. Major Players of Venous Whole Blood

Table 19. Major Players of Capillary Blood

Table 20. Major Players of Other

Table 21. Global Automatic Blood Smear Preparation Instrument Sales by Sample Type (2021-2026) & (Units)

Table 22. Global Automatic Blood Smear Preparation Instrument Sales Market Share by

Sample Type (2021-2026)

Table 23. Global Automatic Blood Smear Preparation Instrument Revenue by Sample Type (2021-2026) & (\$ million)

Table 24. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Sample Type (2021-2026)

Table 25. Global Automatic Blood Smear Preparation Instrument Sale Price by Sample Type (2021-2026) & (US\$/Unit)

Table 26. Global Automatic Blood Smear Preparation Instrument Sale by Application (2021-2026) & (Units)

Table 27. Global Automatic Blood Smear Preparation Instrument Sale Market Share by Application (2021-2026)

Table 28. Global Automatic Blood Smear Preparation Instrument Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Application (2021-2026)

Table 30. Global Automatic Blood Smear Preparation Instrument Sale Price by Application (2021-2026) & (US\$/Unit)

Table 31. Global Automatic Blood Smear Preparation Instrument Sales by Company (2021-2026) & (Units)

Table 32. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Company (2021-2026)

Table 33. Global Automatic Blood Smear Preparation Instrument Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Company (2021-2026)

Table 35. Global Automatic Blood Smear Preparation Instrument Sale Price by Company (2021-2026) & (US\$/Unit)

Table 36. Key Manufacturers Automatic Blood Smear Preparation Instrument Producing Area Distribution and Sales Area

Table 37. Players Automatic Blood Smear Preparation Instrument Products Offered

Table 38. Automatic Blood Smear Preparation Instrument Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Automatic Blood Smear Preparation Instrument Sales by Geographic Region (2021-2026) & (Units)

Table 42. Global Automatic Blood Smear Preparation Instrument Sales Market Share Geographic Region (2021-2026)

Table 43. Global Automatic Blood Smear Preparation Instrument Revenue by

Geographic Region (2021-2026) & (\$ millions)

Table 44. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Automatic Blood Smear Preparation Instrument Sales by Country/Region (2021-2026) & (Units)

Table 46. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Country/Region (2021-2026)

Table 47. Global Automatic Blood Smear Preparation Instrument Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Country/Region (2021-2026)

Table 49. Americas Automatic Blood Smear Preparation Instrument Sales by Country (2021-2026) & (Units)

Table 50. Americas Automatic Blood Smear Preparation Instrument Sales Market Share by Country (2021-2026)

Table 51. Americas Automatic Blood Smear Preparation Instrument Revenue by Country (2021-2026) & (\$ millions)

Table 52. Americas Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026) & (Units)

Table 53. Americas Automatic Blood Smear Preparation Instrument Sales by Application (2021-2026) & (Units)

Table 54. APAC Automatic Blood Smear Preparation Instrument Sales by Region (2021-2026) & (Units)

Table 55. APAC Automatic Blood Smear Preparation Instrument Sales Market Share by Region (2021-2026)

Table 56. APAC Automatic Blood Smear Preparation Instrument Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026) & (Units)

Table 58. APAC Automatic Blood Smear Preparation Instrument Sales by Application (2021-2026) & (Units)

Table 59. Europe Automatic Blood Smear Preparation Instrument Sales by Country (2021-2026) & (Units)

Table 60. Europe Automatic Blood Smear Preparation Instrument Revenue by Country (2021-2026) & (\$ millions)

Table 61. Europe Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026) & (Units)

Table 62. Europe Automatic Blood Smear Preparation Instrument Sales by Application (2021-2026) & (Units)

Table 63. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales by Country (2021-2026) & (Units)

Table 64. Middle East & Africa Automatic Blood Smear Preparation Instrument Revenue Market Share by Country (2021-2026)

Table 65. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales by Type (2021-2026) & (Units)

Table 66. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales by Application (2021-2026) & (Units)

Table 67. Key Market Drivers & Growth Opportunities of Automatic Blood Smear Preparation Instrument

Table 68. Key Market Challenges & Risks of Automatic Blood Smear Preparation Instrument

Table 69. Key Industry Trends of Automatic Blood Smear Preparation Instrument

Table 70. Automatic Blood Smear Preparation Instrument Raw Material

Table 71. Key Suppliers of Raw Materials

Table 72. Automatic Blood Smear Preparation Instrument Distributors List

Table 73. Automatic Blood Smear Preparation Instrument Customer List

Table 74. Global Automatic Blood Smear Preparation Instrument Sales Forecast by Region (2027-2032) & (Units)

Table 75. Global Automatic Blood Smear Preparation Instrument Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 76. Americas Automatic Blood Smear Preparation Instrument Sales Forecast by Country (2027-2032) & (Units)

Table 77. Americas Automatic Blood Smear Preparation Instrument Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 78. APAC Automatic Blood Smear Preparation Instrument Sales Forecast by Region (2027-2032) & (Units)

Table 79. APAC Automatic Blood Smear Preparation Instrument Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Europe Automatic Blood Smear Preparation Instrument Sales Forecast by Country (2027-2032) & (Units)

Table 81. Europe Automatic Blood Smear Preparation Instrument Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales Forecast by Country (2027-2032) & (Units)

Table 83. Middle East & Africa Automatic Blood Smear Preparation Instrument Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 84. Global Automatic Blood Smear Preparation Instrument Sales Forecast by Type (2027-2032) & (Units)

Table 85. Global Automatic Blood Smear Preparation Instrument Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 86. Global Automatic Blood Smear Preparation Instrument Sales Forecast by Application (2027-2032) & (Units)

Table 87. Global Automatic Blood Smear Preparation Instrument Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. Sysmex Basic Information, Automatic Blood Smear Preparation Instrument Manufacturing Base, Sales Area and Its Competitors

Table 89. Sysmex Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

Table 90. Sysmex Automatic Blood Smear Preparation Instrument Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 91. Sysmex Main Business

Table 92. Sysmex Latest Developments

Table 93. Beckman Coulter Basic Information, Automatic Blood Smear Preparation Instrument Manufacturing Base, Sales Area and Its Competitors

Table 94. Beckman Coulter Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

Table 95. Beckman Coulter Automatic Blood Smear Preparation Instrument Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 96. Beckman Coulter Main Business

Table 97. Beckman Coulter Latest Developments

Table 98. HORIBA Basic Information, Automatic Blood Smear Preparation Instrument Manufacturing Base, Sales Area and Its Competitors

Table 99. HORIBA Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

Table 100. HORIBA Automatic Blood Smear Preparation Instrument Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. HORIBA Main Business

Table 102. HORIBA Latest Developments

Table 103. Mindray Basic Information, Automatic Blood Smear Preparation Instrument Manufacturing Base, Sales Area and Its Competitors

Table 104. Mindray Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

Table 105. Mindray Automatic Blood Smear Preparation Instrument Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. Mindray Main Business

Table 107. Mindray Latest Developments

Table 108. CellaVision Basic Information, Automatic Blood Smear Preparation

Instrument Manufacturing Base, Sales Area and Its Competitors

Table 109. CellaVision Automatic Blood Smear Preparation Instrument Product Portfolios and Specifications

Table 110. CellaVision Automatic Blood Smear Preparation Instrument Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. CellaVision Main Business

Table 112. CellaVision Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of Automatic Blood Smear Preparation Instrument

Figure 2. Automatic Blood Smear Preparation Instrument Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global Automatic Blood Smear Preparation Instrument Sales Growth Rate 2021-2032 (Units)

Figure 7. Global Automatic Blood Smear Preparation Instrument Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. Automatic Blood Smear Preparation Instrument Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. Automatic Blood Smear Preparation Instrument Sales Market Share by Country/Region (2025)

Figure 10. Automatic Blood Smear Preparation Instrument Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Fully Automatic

Figure 12. Product Picture of Semi-automatic

Figure 13. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Type in 2026

Figure 14. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Type (2021-2026)

Figure 15. Product Picture of Low-Throughput Systems (Below 30 Slides/hour)

Figure 16. Product Picture of Medium-Throughput Systems (30-75 Slides/hour)

Figure 17. Product Picture of High-Throughput Systems (Above 75 Slides/hour)

Figure 18. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Throughput in 2026

Figure 19. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Throughput (2021-2026)

Figure 20. Product Picture of Venous Whole Blood

Figure 21. Product Picture of Capillary Blood

Figure 22. Product Picture of Other

Figure 23. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Sample Type in 2026

Figure 24. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Sample Type (2021-2026)

Figure 25. Automatic Blood Smear Preparation Instrument Consumed in Hospital

Figure 26. Global Automatic Blood Smear Preparation Instrument Market: Hospital (2021-2026) & (Units)

Figure 27. Automatic Blood Smear Preparation Instrument Consumed in Independent Clinical Laboratories

Figure 28. Global Automatic Blood Smear Preparation Instrument Market: Independent Clinical Laboratories (2021-2026) & (Units)

Figure 29. Automatic Blood Smear Preparation Instrument Consumed in Other

Figure 30. Global Automatic Blood Smear Preparation Instrument Market: Other (2021-2026) & (Units)

Figure 31. Global Automatic Blood Smear Preparation Instrument Sale Market Share by Application (2025)

Figure 32. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Application in 2025

Figure 33. Automatic Blood Smear Preparation Instrument Sales by Company in 2025 (Units)

Figure 34. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Company in 2025

Figure 35. Automatic Blood Smear Preparation Instrument Revenue by Company in 2025 (\$ millions)

Figure 36. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Company in 2025

Figure 37. Global Automatic Blood Smear Preparation Instrument Sales Market Share by Geographic Region (2021-2026)

Figure 38. Global Automatic Blood Smear Preparation Instrument Revenue Market Share by Geographic Region in 2025

Figure 39. Americas Automatic Blood Smear Preparation Instrument Sales 2021-2026 (Units)

Figure 40. Americas Automatic Blood Smear Preparation Instrument Revenue 2021-2026 (\$ millions)

Figure 41. APAC Automatic Blood Smear Preparation Instrument Sales 2021-2026 (Units)

Figure 42. APAC Automatic Blood Smear Preparation Instrument Revenue 2021-2026 (\$ millions)

Figure 43. Europe Automatic Blood Smear Preparation Instrument Sales 2021-2026 (Units)

Figure 44. Europe Automatic Blood Smear Preparation Instrument Revenue 2021-2026 (\$ millions)

Figure 45. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales

2021-2026 (Units)

Figure 46. Middle East & Africa Automatic Blood Smear Preparation Instrument Revenue 2021-2026 (\$ millions)

Figure 47. Americas Automatic Blood Smear Preparation Instrument Sales Market Share by Country in 2025

Figure 48. Americas Automatic Blood Smear Preparation Instrument Revenue Market Share by Country (2021-2026)

Figure 49. Americas Automatic Blood Smear Preparation Instrument Sales Market Share by Type (2021-2026)

Figure 50. Americas Automatic Blood Smear Preparation Instrument Sales Market Share by Application (2021-2026)

Figure 51. United States Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 52. Canada Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 53. Mexico Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 54. Brazil Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 55. APAC Automatic Blood Smear Preparation Instrument Sales Market Share by Region in 2025

Figure 56. APAC Automatic Blood Smear Preparation Instrument Revenue Market Share by Region (2021-2026)

Figure 57. APAC Automatic Blood Smear Preparation Instrument Sales Market Share by Type (2021-2026)

Figure 58. APAC Automatic Blood Smear Preparation Instrument Sales Market Share by Application (2021-2026)

Figure 59. China Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 60. Japan Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 61. South Korea Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 62. Southeast Asia Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 63. India Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 64. Australia Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 65. China Taiwan Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 66. Europe Automatic Blood Smear Preparation Instrument Sales Market Share by Country in 2025

Figure 67. Europe Automatic Blood Smear Preparation Instrument Revenue Market Share by Country (2021-2026)

Figure 68. Europe Automatic Blood Smear Preparation Instrument Sales Market Share by Type (2021-2026)

Figure 69. Europe Automatic Blood Smear Preparation Instrument Sales Market Share by Application (2021-2026)

Figure 70. Germany Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 71. France Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 72. UK Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 73. Italy Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 74. Russia Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 75. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales Market Share by Country (2021-2026)

Figure 76. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales Market Share by Type (2021-2026)

Figure 77. Middle East & Africa Automatic Blood Smear Preparation Instrument Sales Market Share by Application (2021-2026)

Figure 78. Egypt Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Africa Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 80. Israel Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 81. Turkey Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 82. GCC Countries Automatic Blood Smear Preparation Instrument Revenue Growth 2021-2026 (\$ millions)

Figure 83. Manufacturing Cost Structure Analysis of Automatic Blood Smear Preparation Instrument in 2026

Figure 84. Manufacturing Process Analysis of Automatic Blood Smear Preparation

Instrument

Figure 85. Industry Chain Structure of Automatic Blood Smear Preparation Instrument

Figure 86. Channels of Distribution

Figure 87. Global Automatic Blood Smear Preparation Instrument Sales Market

Forecast by Region (2027-2032)

Figure 88. Global Automatic Blood Smear Preparation Instrument Revenue Market

Share Forecast by Region (2027-2032)

Figure 89. Global Automatic Blood Smear Preparation Instrument Sales Market Share

Forecast by Type (2027-2032)

Figure 90. Global Automatic Blood Smear Preparation Instrument Revenue Market

Share Forecast by Type (2027-2032)

Figure 91. Global Automatic Blood Smear Preparation Instrument Sales Market Share

Forecast by Application (2027-2032)

Figure 92. Global Automatic Blood Smear Preparation Instrument Revenue Market

Share Forecast by Application (2027-2032)

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