

# **2013 Analysis of the European Hematology and Flow Cytometry Markets: France, Germany, Italy, Spain, UK Emerging Opportunities, Supplier Shares, Country Forecasts, Innovative Technologies, and Competitive Landscape**

<https://marketpublishers.com/r/24CE4AC1E35EN.html>

Date: April 2013

Pages: 190

Price: US\$ 15,760.00 (Single User License)

ID: 24CE4AC1E35EN

## **Abstracts**

This unique report provides information not available from any other published source, including test volume forecasts, instrument placements and installed base by manufacturer and model, as well as sales and market shares of leading instrument and reagents suppliers:

Specimen forecasts by market segment

Test volume forecasts by assay and market segment

Reagent and instrument sales forecasts by market segment

Instrument placements and installed base by manufacturer and model

Sales and market shares of reagent and instrument suppliers

This report will help current suppliers and potential market entrants identify and evaluate emerging opportunities in the hematology and flow cytometry markets during the next five years. The report explores future marketing and technological trends in five major European countries (France, Germany, Italy, Spain, UK); provides market share estimates, test volume forecasts, and instrument placements; compares features of leading analyzers; profiles of top competitors and emerging market entrants; and

suggests specific product and marketing opportunities for instrument and reagent suppliers.

During the next five years, the continued advances in molecular diagnostics, monoclonal antibodies, lasers and IT, as well as growing understanding of immunological forces regulating systemic diseases, will have a profound impact on the hematology and flow cytometry markets worldwide. New molecular diagnostic and monoclonal antibody tests will facilitate existing procedures and provide basis for sensitive, specific and simple assays. The introduction of smaller and easy-to-operate laser systems will expand applications of flow cytometry to routine clinical laboratories. Further advances in IT will reduce the cost of instrument manufacture, service warranty, and permit development of innovative self-troubleshooting, autocalibration and other advanced features. Presently tedious analyses of chromosomal abnormalities, DNA content, and lymphocyte subsets will become more automated and routine.

Contains 450 pages and 190 tables

## 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
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 Hycl  
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

### **III. FRANCE**

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

### **IV. GERMANY**

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

### **V. ITALY**

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

## **VII. SPAIN**

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

## **VIII. U.K.**

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

## **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  
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

### LIST OF TABLES

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

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

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

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

France, All Market Segments, Total Hematology And Flow Cytometry Specimen Volume

France, All Market Segments, Total Hematology and Flow Cytometry Test Volume

France, Hospital Laboratories Performing Hematology and Flow Cytometry Tests By Bed Size

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

France, Total Routine Hematology Specimen Volume By Market Segment

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

France, Hospital Laboratories, Hematology and Flow Cytometry Specimen Volume Forecast

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

France, Total Routine Hematology Test Volume Forecast By Market Segment

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

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

France, Hospital Laboratories, Routine Hematology Test Volume Forecast

France, Commercial/Private Laboratories, Routine Hematology Test Volume Forecast

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

France, Hospital Laboratories, Flow Cytometry And Special Hematology Test Volume Forecast

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

France, Major Hematology Analyzers, Estimated Placements and Installed Base

France, Major Flow Cytometers, Estimated Placements and Installed Base



France, Total Hematology Market Forecast By Market Segment  
France, Hematology Consumable Market Forecast By Market Segment  
France, Hematology Instrument Market Forecast By Market Segment  
France, Total Flow Cytometry Market Forecast By Market Segment  
France, Flow Cytometry Consumable Market Forecast By Market Segment  
France, Flow Cytometry Instrument Market Forecast By Market Segment  
France, Total Hematology Market By Major Supplier  
France, Hematology Consumable Market By Major Supplier  
France, Hematology Instrument Market By Major Supplier  
France, Total Flow Cytometry Market By Major Supplier  
France, Flow Cytometry Consumable Market By Major Supplier  
France, Flow Cytometry Instrument Market By Major Supplier  
Summary Table I: Germany, All Market Segments Total Hematology and Flow Cytometry Specimen Volume Forecast  
Summary Table II: Germany, All Market Segments Total Hematology and Flow Cytometry Test Volume Forecast  
Summary Table III: Germany, All Market Segments Total Hematology and Flow Cytometry Market Forecast  
Germany, Laboratories Performing Hematology and Flow Cytometry Testing By Market Segment  
Germany, Hospital Laboratories Performing Hematology and Flow Cytometry Tests By Bed Size  
Germany, Commercial/Private Laboratories Performing Hematology and Flow Cytometry Tests By Annual Test Volume  
Germany, Physician Office Laboratories Performing Hematology and Flow Cytometry Tests By Annual Test Volume  
Germany, Total Routine Hematology Specimen Volume Forecast By Market Segment  
Germany, Total Flow Cytometry and Special Hematology Specimen Volume Forecast By Market Segment  
Germany, Hospital Laboratories, Hematology And Flow Cytometry Specimen Volume Forecast  
Germany, Commercial/Private Laboratories Hematology and Flow Cytometry Specimen Volume Forecast  
Germany, Total Routine Hematology Test Volume Forecast By Market Segment  
Germany, Total Flow Cytometry and Special Hematology Test Volume Forecast By Market Segment  
Germany, All Market Segments, Total Routine Hematology Test Volume Forecast  
Germany, Hospital Laboratories, Routine Hematology Test Volume Forecast  
Germany, Commercial/Private Laboratories, Routine Hematology Test Volume Forecast

Germany, Physician Office Laboratories, Routine Hematology Test Volume Forecast  
Germany, All Market Segments, Total Flow Cytometry and Special Hematology Test  
Volume Forecast

Germany, Hospital Laboratories, Flow Cytometry And Special Hematology Test Volume  
Forecast

Germany, Commercial/Private Laboratories, Flow Cytometry and Special Hematology  
Test Volume Forecast

Germany, Major Hematology Analyzers, Estimated Placements and Installed Base

Germany, Major Flow Cytometers, Estimated Placements and Installed Base

Germany, Total Hematology Market Forecast By Market Segment

Germany, Hematology Consumable Market Forecast By Market Segment

Germany, Hematology Instrument Market Forecast By Market Segment

Germany, Total Flow Cytometry Market Forecast By Market Segment

Germany, Flow Cytometry Consumable Market Forecast By Market Segment

Germany, Flow Cytometry Instrument Market Forecast By Market Segment

Germany, Total Hematology Market By Major Supplier

Germany, Hematology Consumable Market By Major Supplier

Germany, Hematology Instrument Market By Major Supplier

Germany, Total Flow Cytometry Market By Major Supplier

Germany, Flow Cytometry Consumable Market By Major Supplier

Germany, Flow Cytometry Instrument Market By Major Supplier

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

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

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

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

Italy, Hospital Laboratories Performing Hematology and Flow Cytometry Tests By Bed  
Size

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

Italy, Total Routine Hematology Specimen Volume By Market Segment

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

Italy, Hospital Laboratories, Hematology and Flow Cytometry Specimen Volume  
Forecast

Italy, Commercial/Private Laboratories, Hematology and Flow Cytometry Specimen

## Volume Forecast

Italy, Total Routine Hematology Test Volume Forecast By Market Segment

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

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

Italy, Hospital Laboratories, Routine Hematology Test Volume Forecast

Italy, Commercial/Private Laboratories, Routine Hematology Test Volume Forecast

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

Italy, Hospital Laboratories, Flow Cytometry And Special Hematology Test Volume Forecast

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

Italy, Major Hematology Analyzers, Estimated Placements and Installed Base

Italy, Major Flow Cytometers, Estimated Placements and Installed Base

Italy, Total Hematology Market Forecast By Market Segment

Italy, Hematology Consumable Market Forecast By Market Segment

Italy, Hematology Instrument Market Forecast By Market Segment

Italy, Total Flow Cytometry Market Forecast By Market Segment

Italy, Flow Cytometry Instrument Market Forecast By Market Segment

Italy, Flow Cytometry Consumable Market Forecast By Market Segment

Italy, Total Hematology Market By Major Supplier

Italy, Hematology Consumable Market By Major Supplier

Italy, Hematology Instrument Market By Major Supplier

Italy, Total Flow Cytometry Market By Major Supplier

Italy, Flow Cytometry Consumable Market By Major Supplier

Italy, Flow Cytometry Instrument Market By Major Supplier

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

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

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

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

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

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

Spain, Total Routine Hematology Specimen Volume Forecast By Market Segment

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

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

Spain, Ambulatory Care Centers, Hematology And Flow Cytometry Specimen Volume Forecast

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

Spain, Total Routine Hematology Test Volume Forecast By Market Segment

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

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

Spain, Hospital Laboratories, Routine Hematology Test Volume Forecast

Spain, Ambulatory Clinic Laboratories, Routine Hematology Test Volume Forecast

Spain, Commercial/Private Laboratories, Routine Hematology Test Volume Forecast

Spain, All Market Segments, Flow Cytometry And Special Hematology Test Volume Forecast

Spain, Hospital Laboratories, Flow Cytometry And Special 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, Total Hematology Market Forecast By Market Segment

Spain, Hematology Consumable Market Forecast By Market Segment

Spain, Hematology Instrument Market Forecast By Market Segment

Spain, Total Flow Cytometry Market Forecast By Market Segment

Spain, Flow Cytometry Consumable Market Forecast By Market Segment

Spain, Flow Cytometry Instrument Market Forecast By Market Segment

Spain, Total Hematology Market By Major Supplier

Spain, Hematology Consumable Market By Major Supplier

Spain, Hematology Instrument Market By Major Supplier

Spain, Total Flow Cytometry Market By Major Supplier

Spain, Hematology Consumable Market By Major Supplier

Spain, Total Flow Cytometry Market By Major Supplier

Spain, Flow Cytometry Consumable Market By Major Supplier

Spain, Flow Cytometry Instrument Market By Major Supplier

Summary Table I: U.K., All Market Segments, Total Hematology and Flow Cytometry

Specimen Volume Forecast

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

Summary Table III: U.K., All Market Segments, Total Hematology and Flow Cytometry Market Forecast

U.K., Laboratories Performing Hematology and Flow Cytometry Testing By Market Segment

U.K., Hospital Laboratories Performing Hematology/Flow Cytometry Tests By Bed Size

U.K., Commercial/Private Laboratories, Performing Hematology/Flow Cytometry Tests By Annual Test Volume

U.K., Total Routine Hematology Specimen Volume Forecast By Market Segment

U.K., Total Flow Cytometry and Special Hematology Specimen Volume, By Market Segment

U.K., Hospital Laboratories, Hematology And Flow Cytometry Specimen Volume Forecast

U.K., Commercial/Private Laboratories, Hematology and Flow Cytometry Specimen Volume Forecast

U.K., Total Routine Hematology Test Volume Forecast By Market Segment

U.K., Total Flow Cytometry and Special Hematology Test Volume Forecast By Market Segment

U.K., All Market Segments, Total Routine Hematology Test Volume Forecast

U.K., Hospital Laboratories, Routine Hematology Test Volume Forecast

U.K., Commercial/Private Laboratories, Routine Hematology Test Volume Forecast

U.K., Hospital Laboratories, Flow Cytometry And Special Hematology Test Volume Forecast

U.K., Major Hematology Analyzers, Estimated Placements and Installed Base

U.K., Major Flow Cytometers, Estimated Placements and Installed Base

U.K. Total Hematology Market Forecast By Market Segment

U.K., Hematology Instrument, Market Forecast By Market Segment

U.K., Hematology Consumable, Market Forecast By Market Segment

U.K., Total Flow Cytometry Market Forecast By Market Segment

U.K., Total Flow Cytometry Instrument Market Forecast By Market Segment

U.K., Total Flow Cytometry Consumable Market Forecast By Market Segment

U.K., Total Hematology Market By Major Supplier

U.K., Hematology Instrument Market By Major Supplier

U.K., Hematology Consumable Market By Major Supplier

U.K., Total Flow Cytometry Market By Major Supplier

U.K., Total Flow Cytometry Consumable Market By Major Supplier

U.K., Total Flow Cytometry Instrument Market By Major Supplier

## I would like to order

Product name: 2013 Analysis of the European Hematology and Flow Cytometry Markets: France, Germany, Italy, Spain, UK Emerging Opportunities, Supplier Shares, Country Forecasts, Innovative Technologies, and Competitive Landscape

Product link: <https://marketpublishers.com/r/24CE4AC1E35EN.html>

Price: US\$ 15,760.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/24CE4AC1E35EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970