

# GLOBAL FLOW CYTOMETRY MARKETS *(SAMPLE COPY, NOT FOR RESALE)*

Trends, Industry Participants, Product Overviews and Market Drivers

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## 1. Overview

### 1.1 Statement of Report

The global flow cytometry market is one of the fastest growing segments of the Life Sciences and Clinical Diagnostics Markets, projected to grow at an annualized rate of █% to \$█ in █. This TriMark Publications report provides an analysis of the global flow cytometry market, including size, growth, technology platforms, applications, new instrumentation, industry trends and the internal structure of the sector. In the current life science research, biopharmaceutical and clinical diagnostics markets, flow cytometry offers some of the brightest promise for growth and innovations.

Flow cytometry offers high promise for growth and innovations in life science research, biopharmaceutical discovery and development, and biomarker clinical tests. This TriMark Publications report is an analysis of the Global Flow Cytometry Market including size, growth, technology platforms, applications, and industry trends.

Highly attractive growth areas covered in the study include:

- Stem cell research.
- Immunotherapy for cancer treatment.
- Biomarkers and companion diagnostics.
- Point of care flow cytometry for CD4 testing.
- High throughput screening.
- Immunology and vaccine development.

The main objectives of this analysis are:

- Obtain a complete understanding of the principles of flow cytometry and current and emerging applications.
- Discover feasible market opportunities by identifying high-growth applications in different life science, biopharmaceutical and clinical diagnostic areas.
- Focus on global industry development through an in-depth analysis of the major world markets for flow cytometry, including growth forecasts.
- Identify viable technology drivers through a comprehensive look at platform technologies for flow cytometry.

The rapid growth of flow cytometry instruments, reagents and systems is driven by:

- Introduction of compact, affordable flow cytometry instruments with user-friendly software moving flow cytometry from core laboratories to individual laboratories.
- Multicolor flow cytometers with multiple lasers that can simultaneously detect up to 20 cell parameters, distinguishing subpopulations among millions of cells.
- Integration of flow cytometry with imaging devices and mass cytometry.
- Multiplex bead immunoassays enabling measurement of up to 500 analytes or proteins simultaneously.
- Availability of high speed clinical grade cell sorters for stem cell research and clinical development.
- Development of easier to use point of care flow cytometers for CD4 Testing allowing testing in more sites in resource limited countries with a high prevalence of HIV/AIDS.
- Automated sample preparation and handling, enabling high throughput screening for drug discovery and development.

This review analyzes the size and growth of the global flow cytometry market, including the factors that influence the various market segments within it, both in the U.S. and worldwide. Examined are:

- Flow cytometry technology platforms.
- Applications of flow cytometry.



- Companies participating in this market.
- New instrumentation.
- Trends in the industry.

The reader should consult other TriMark Publications reports at [www.trimarkpublications.com](http://www.trimarkpublications.com) for detailed discussions of important individual market segments related to the flow cytometry market, such as hematology instrumentation and reagent markets, clinical chemistry testing, high-growth diagnostic tests markets, genomics and medical nanotechnology.

## 1.2 About This Report

In this report, the reader will find detailed market analysis and forecasts through [REDACTED] for the global flow cytometry market in North America, Western Europe, Asia-Pacific, the high growth emerging countries (Brazil, India and China) and resource-limited countries. For each region, the research, pharmaceutical and clinical diagnostics market segments are analyzed. Competitors are analyzed in detail.

Of particular interest in this report is the chapter, “The Point of Care Flow Cytometry Market.” The global situation for HIV/AIDS ART and CD4 testing is analyzed in depth. It provides a detailed market forecast for flow cytometry and point of care (POC) flow cytometry, market analysis with table and charts, discussion of key participants, demand drivers, innovative new technologies in the pipeline and recent industry developments.

The rapidly growing field of biomarkers and companion diagnostics are analyzed from the perspective of reference laboratories offering prognostic and predictive biomarker assays with issues of validation discussed. Identification and discussion of drivers and restrictors for adoption of this technology by the pharmaceutical industry are presented. The global investment in stem cell research is discussed in detail.

This report includes the following features:

- Five-year flow cytometry revenue projections by region—North America, Western Europe, Asia-Pacific, emerging high growth countries, and resource-limited countries.
- Five-year reagent, instrument and software revenue projections.
- Review of current instrumentation technologies and a feature comparison of leading systems.
- Market share of leading flow cytometry reagent and instrument suppliers.
- Review of current and emerging flow cytometry technologies and their potential market applications.
- Product development opportunities for new instruments, reagents and auxiliary products.
- Profiles of current and emerging suppliers, including their sales, product portfolios, marketing tactics, technological know-how, new products in R&D, collaborative arrangements, and corporate strategies.
- Business opportunities and strategic recommendations for suppliers.
- Review of current and emerging technologies and their market applications.
- Product development opportunities for new instruments, reagents and consumables.

Key questions answered in this analysis include:

- What is the current state of the flow cytometry market?
- What are the main types of flow cytometry technologies currently available?
- Who are the key players in this marketplace?
- What are the barriers to entry for the flow cytometry market?
- Which companies are utilizing cutting-edge technologies to develop, validate and market flow cytometry?
- What are the current and projected flow cytometry market sizes in North America, Western Europe, Asia-Pacific, high growth emerging countries, and resource-limited countries?
- What are the drivers and restrictors influencing the flow cytometry market?
- Which flow cytometry application areas have the greatest potential for growth?
- What are the near-term business opportunities in the flow cytometry market?
- What are the development trends in flow cytometry?

- Where are the new market growth areas in flow cytometry instruments and reagents?
- How are complementary technologies blending with flow cytometry?
- What are the main business strategies adopted by leading flow cytometry companies?
- Who holds the proprietary rights to the flow cytometry market technology platforms?
- How is this technology currently being applied and utilized?
- What regulatory processes apply to flow cytometry testing technologies.
- Which alliances show the greatest synergy in bringing flow cytometry to market?
- Which shared technologies are driving the most encouraging development?
- What are the business issues that go into justifying flow cytometry?

### 1.3 Scope of the Report

The purpose of this report is to describe the specific segments of the global flow cytometry market that are highly active in terms of innovation and growth. Specifically, this study examines the markets for high-end multicolor analyzers, cell sorters, compact flow cytometers, point of care flow cytometry, fluorescent dyes, multiplex bead assays, high throughput sample preparation and handling, and software. This examination defines the dollar revenue in each major regional and country market, and it analyzes the factors that influence the size and growth of the individual market segments. The report details the market sizes and growth rates for these regions.

The emphasis in this analysis is on those companies who are actively developing and marketing flow cytometry instruments and reagents for life sciences research, pharmaceutical drug discovery and development, and clinical diagnostics. This study examines the flow cytometry instrument and reagents industry in the U.S., Western Europe, Asia-Pacific, high growth emerging countries, and resource-limited countries. These regional markets and their differences are examined in terms of investment in life sciences research, pharmaceutical drug development, and clinical diagnostics. Particular attention is paid to those regions in which the flow cytometry market is showing the greatest growth or most innovation.

### 1.4 Methodology

The principal analyst and author of this report holds graduate degrees in Clinical Laboratory Science from the University of Nebraska and High Technology Management from Northeastern University. She has held senior marketing positions in major life sciences companies specializing in laboratory instrumentation and reagents for cell biology and gene expression. She has also managed the marketing of process scale bioseparations systems for the biopharmaceutical industry. Most recently she has provided technical and laboratory management assistance to resource limited countries in Sub-Saharan Africa supported by PEPFAR funded programs.

The contributing author of this report holds a Ph.D. in biochemistry from the University of Minnesota, with many decades of experience in science writing and as a medical industry analyst. He has over 40 years of experience as a director in laboratory testing and instrument and reagent development technology, as well as extensive experience in senior level positions in biotech and medical service companies.

Company-specific information is obtained mainly from industry trade publications, academic journals, news and research articles, press releases and corporate websites, as well as annual reports for publicly-held firms. Additional sources of information include non-governmental organizations (NGOs) such as the World Health Organization (WHO) and governmental entities such as the U.S. Department of Health and Human Services (HHS), the National Institutes of Health (NIH), the Food and Drug Administration (FDA) and the Centers for Disease Control and Prevention (CDC). Where possible and practicable, the most recent data available have been used.

Some of the statistical information was taken from Biotechnology Associates' databases and from TriMark's private data stores. The information in this study was obtained from sources that we believe to be reliable, but we do not guarantee the accuracy, adequacy or completeness of any information or omission or for the results obtained by the use of such information. Key information from the business literature was used as a basis to conduct dialogue with and obtain expert opinion from market professionals regarding commercial potential and market sizes. Senior managers from major company players were interviewed for part of the information in this report.

### ***Primary Sources***

TriMark collects information from hundreds of Database Tables and many comprehensive multi-client research projects, as well as Sector Snapshots that it publishes annually. TriMark extracts relevant data and analytics from its research as part of this data collection. Information on flow cytometry instruments and clinical methods were obtained in part from interviews with representatives of the major companies in the sector.

### ***Secondary Sources***

TriMark uses research publications, journals, magazines, newspapers, newsletters, industry reports, investment research reports, trade and industry association reports, government-affiliated trade releases and other published information as part of its secondary research materials. The information is then analyzed and translated by the Industry Research Group into a TriMark study. The Editorial Group reviews the complete package with product and market forecasts, critical industry trends, threats and opportunities, competitive strategies and market share determinations.

### ***Market Forecasts and Modeling***

The numerical data on market size, growth rates and sales forecasts are obtained from a well-examined model based upon quantitative market information obtained from the leading global companies in the sector, private seminar presentations by company experts and public SEC filings. Many industry experts are also consulted to confirm these market estimates. The numbers used are washed of discounts and returns, and represent the final sale numbers. In addition, global numbers are assessed by region components as well, taking into account differences in market conditions between the U.S., Western Europe, Asian and emerging markets in particular.

### ***TriMark Publications Report, Research and Data Acquisition Structure***

The general sequence of research and analysis activity prior to the publication of every report in TriMark Publications includes the following items:

- Completing an extensive secondary research effort on an important market sector, including gathering all relevant information from corporate reporting, publicly-available data and proprietary databases.
- Formulating a study outline with the assigned writer, including important items, as follows:
  - Market and product segment grouping, and evaluating their relative significance.
  - Key competitors' evaluations, including their relative positions in the business and other relevant facts to prioritize diligence levels and assist in designing a primary research strategy.
  - End-user research to evaluate analytical significance in market estimation.
  - Supply chain research and analysis to identify any factors affecting the market.
  - New technology platforms and cutting-edge applications.
- Identifying the key technology and market trends that drive or affect these markets.
- Assessing the regional significance for each product and market segment for proper emphasis of further regional/national primary and secondary research.
- Completing a confirmatory primary research assessment of the report's findings with the assistance of expert panel partners from the industry being analyzed.