

# THE HEMATOLOGY MARKET MONITOR™



The Hematology MARKET MONITOR™ is a tracking study designed to support the marketing decision maker focused on the hematology testing market.

Primary issues addressed in this report include:

1. The size of the market
2. The performance of manufacturers providing the products used to conduct these tests.

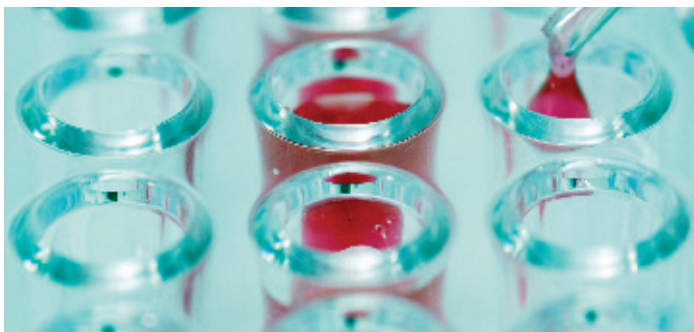
Published annually, the Hematology MARKET MONITOR™ addresses testing for selected analytes in two primary market segments:

1. Hospitals
2. Commercial Laboratories

## Data Collection

Approximately twelve percent of the clinical laboratories in the domestic market currently participate in this tracking study. Nearly 700 laboratories return completed questionnaires via the mail each year. A mail survey technique is employed as this approach facilitates the need to look up test volume data or consult with colleagues regarding systems in use. The mail survey method also permits the study respondent to complete the questionnaire at a convenient time thus ensuring as thoughtful a response as possible.

A stabilized sample, with 90 percent of the same facilities reporting from cycle to cycle, provides a highly sensitive measure of change from year to year. It is possible to accurately estimate changes in demand for each test from year to year or shifts in market share between periods for manufacturers serving this market sector.



## Tests Included In The Study

CBC • HgB • HcT • RBC • WBC • Indices • Platelet Counts • Reticulocyte Counts • 3 Part Automated Differential • 5 Part Automated Differential • 6 Part Automated Differential • Manual Differential • Immature Reticulocyte Fraction • CHr

## Contents

### Market Size

|                       |   |
|-----------------------|---|
| Market Size:          | Number of facilities performing each test in-house          |
| Demand:               | Number of results reported per year by analyte              |
| Growth Rates:         | Year to year comparison of result volume (subsequent cycle) |
| Segment Contribution: | Percent of annual result volume by market segment           |

### Competitive Performance

|                |   |
|----------------|---|
| Client Base:   | Number of accounts using each manufacturer's testing products         |
| Volume Share:  | Number of results reported using each manufacturer's testing products |
| Revenue Share: | Reagent revenue captured by each leading manufacturer                 |

### Segmentation

|                 |                                      |
|-----------------|--------------------------------------|
| Hospital:       | Reported by five bed size categories |
| Commercial Lab: | Reported by three volume categories  |

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## Additional Issues Covered

|  |  |
|--|--|
| <b>Analyzer Configuration</b>            | Number of Analyzers Per Laboratory<br>Type of Analyzer Deployment Per Laboratory |
| <b>Intention to Acquire New Analyzer</b> | Number in Market<br>Brands Under Consideration For Acquisition                   |
| <b>Service Issues</b>                    | Contract Utilization • Source of Service • Type of Service Contract              |
| <b>Decentralized Testing</b>             | Offsite CBC Status • Number of Locations • Brands Used                           |

## Approximate Sample Composition

| Market Segment          | Number In Universe | Number In Sample | Sample As Percent Of Universe |
|-------------------------|--------------------|------------------|-------------------------------|
| Hospitals               | 5,194              | 600              | 11.6                          |
| Commercial Laboratories | 489                | 87               | 17.8                          |
| <b>Total</b>            | <b>5,683</b>       | <b>687</b>       | <b>12.1</b>                   |

## 2016 Pricing Report (19<sup>th</sup> Cycle)

|   |                 |
|---|-----------------|
| <b>Total Report (All Sections Included)</b> | <b>\$41,925</b> |
|---|-----------------|

Data for the 2016 Hematology MARKET MONITOR™ is collected in May 2016 and will reflect the market as of the second quarter of 2016. The report is published in July, 2016.

