

Enzyme Linked Immunosorbent Assay Market – Global Industry Size, Share, Trends, Opportunity, & Forecast Segmented By Type (Direct ELISA, Indirect ELISA, Sandwich ELISA), By Application (Disease diagnosis, Vaccine Development, Other), By End User (Hospitals, Research & Academic Institutions), By Region & Competition, 2019-2029F

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Abstracts

Global Enzyme Linked Immunosorbent Assay Market was valued at USD 2.45 billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.85% through 2029. The global ELISA market is experiencing strong growth driven by higher healthcare spending, advancements in biotechnology, and increased demand for precise diagnostic tools across diverse sectors. Competition is intense among key players who prioritize innovation, strategic partnerships, and expanding their market reach. Leading firms are investing heavily in research and development to create advanced ELISA platforms, broaden their product ranges, and strengthen market position through technological advancements and global expansion strategies. With rising disease rates and continuous technological progress, the ELISA market is poised for sustained growth, particularly in personalized medicine, infectious disease diagnostics, and emerging markets. Companies are poised to leverage these opportunities to maintain growth and leadership in this competitive landscape.

Key Market Drivers

Increasing Incidence of Chronic and Infectious Diseases

Chronic diseases such as cancer, cardiovascular diseases, diabetes, and autoimmune

disorders are on the rise globally due to aging populations, sedentary lifestyles, and changing dietary habits. Additionally, infectious diseases continue to pose significant public health challenges. Healthcare providers and clinical laboratories require accurate and reliable diagnostic tools to detect and monitor these conditions early, facilitating timely intervention and improved patient outcomes. ELISA assays excel in detecting specific biomarkers associated with various diseases, offering high sensitivity and specificity crucial for effective disease management and treatment planning.

ELISA is widely utilized in clinical diagnostics, pharmaceutical research, and academic studies to quantify proteins, antibodies, hormones, and infectious agents in biological samples. As the incidence of diseases increases, there is a parallel rise in the demand for diagnostic assays capable of detecting disease-specific biomarkers with precision and reproducibility. ELISA's versatility and adaptability across different disease areas, coupled with its established reliability in clinical settings, position it favorably to meet the growing diagnostic needs across diverse healthcare environments. Advances in personalized medicine emphasize the importance of biomarkers for patient stratification, treatment selection, and therapeutic monitoring. ELISA assays play a critical role in biomarker discovery and validation, enabling pharmaceutical companies to identify novel targets, assess drug efficacy, and tailor treatments based on individual patient profiles. The increasing emphasis on precision medicine drives demand for robust and scalable ELISA platforms capable of quantifying biomarkers with high accuracy and reproducibility, thereby supporting personalized healthcare approaches.

Infectious disease outbreaks, such as influenza, Zika virus, and COVID-19, highlight the critical need for rapid and sensitive diagnostic tools for epidemiological surveillance and outbreak response. ELISA-based assays are integral to detecting and monitoring infectious agents, facilitating early detection, containment strategies, and vaccine development efforts. Continued investment in ELISA technology enhances its role in global health security, fostering partnerships between healthcare agencies, research institutions, and diagnostic manufacturers to enhance preparedness and response capabilities. Rising healthcare expenditures worldwide underscore the importance of cost-effective diagnostic solutions that improve clinical outcomes and reduce long-term healthcare costs associated with chronic disease management. ELISA's cost-effectiveness, scalability, and ability to handle large sample volumes make it a preferred choice for routine diagnostics and research applications, driving market growth. Strategic investments in ELISA technology advancements and market expansion initiatives capitalize on the growing demand for reliable diagnostic assays in both developed and emerging markets, supporting sustainable market expansion and

revenue growth.

Advancements in Biotechnology and Life Sciences

Continuous innovation in antibody engineering, recombinant protein production, and conjugation chemistry enhances the sensitivity and specificity of ELISA assays. Improved detection limits enable ELISA to accurately quantify low-abundance biomarkers, proteins, antibodies, and pathogens in complex biological samples. Biotechnological advancements empower ELISA manufacturers to develop high-performance assay kits that meet stringent diagnostic and research requirements, driving adoption across diverse applications in healthcare and life sciences.

Integration of multiplexing technologies allows simultaneous detection of multiple analytes within a single sample, expanding ELISA's utility in biomarker profiling and disease screening. Multiplex ELISA platforms streamline workflow efficiencies, reduce sample volumes, and offer cost-effective solutions for comprehensive diagnostic testing and research applications. Advancements in multiplexing enhance ELISA's competitiveness by addressing demand for rapid, accurate, and scalable diagnostic solutions in personalized medicine, drug development, and epidemiological surveillance. Adoption of advanced detection technologies, such as fluorescence-based assays, chemiluminescence, and digital imaging systems, improves assay performance metrics such as dynamic range, speed, and reproducibility. Enhanced data analysis capabilities through automation, artificial intelligence (AI), and machine learning (ML) algorithms enable real-time interpretation of ELISA results, facilitating clinical decision-making and research insights. Biotechnological innovations drive the development of next-generation ELISA platforms that integrate advanced detection and data analytics, positioning manufacturers to capture market share by delivering cutting-edge diagnostic solutions with superior performance metrics.

ELISA assays play a crucial role in pharmaceutical research by validating biomarkers, assessing drug efficacy, and monitoring therapeutic response in clinical trials and post-market surveillance. Advancements in biotechnology enable ELISA to support precision medicine initiatives, accelerating the development of targeted therapies and companion diagnostics tailored to individual patient profiles. Collaborations between biotechnology firms, pharmaceutical companies, and diagnostic manufacturers foster innovation in ELISA technology, driving growth through specialized assays that address unmet clinical needs and regulatory requirements. Globalization of biotechnology hubs, research collaborations, and regulatory harmonization initiatives facilitate market entry and expansion opportunities for ELISA manufacturers. Strategic partnerships, licensing

agreements, and geographic diversification bolster market penetration, enabling companies to leverage regional expertise and infrastructure for product development and commercialization. Biotechnological advancements support ELISA's role as a cornerstone diagnostic tool in global healthcare systems, addressing diverse market demands for accurate, affordable, and scalable solutions across developed and emerging markets.

Increasing Demand for Point-of-Care Testing (POCT) Solutions

POCT facilitates rapid diagnostic testing at or near the patient's location, reducing turnaround times and enabling immediate clinical decision-making. ELISA-based POCT devices offer healthcare providers timely access to accurate diagnostic results for infectious diseases, chronic conditions, and biomarker monitoring. The ability of ELISA to deliver sensitive and specific results in decentralized settings expands market reach, catering to healthcare facilities, remote areas, and emergency services seeking reliable diagnostic tools for efficient patient management.

POCT addresses healthcare disparities by providing diagnostic capabilities in resource-limited settings lacking sophisticated laboratory infrastructure. ELISA-based POCT devices leverage simplified operation, minimal sample requirements, and robust performance to meet diagnostic needs in developing countries and remote communities. Manufacturers focusing on portable, user-friendly ELISA platforms capture opportunities in expanding global markets, promoting equitable healthcare access and driving revenue growth through market penetration initiatives. Advances in digital health, including connectivity, cloud-based data management, and smartphone applications, enhance POCT device functionality and data accessibility. ELISA-based POCT systems leverage digital integration for real-time data transmission, remote monitoring, and decision support, improving healthcare provider efficiency and patient outcomes. Investment in digital infrastructure strengthens ELISA's competitive advantage in POCT markets, fostering partnerships with telemedicine providers, health systems, and public health agencies to optimize diagnostic workflows and expand market presence.

Regulatory agencies recognize the clinical utility and public health benefits of POCT devices, facilitating expedited approvals and market access for ELISA-based technologies. ELISA manufacturers benefit from streamlined regulatory pathways, accelerating product commercialization timelines and reducing market entry barriers. Proactive engagement with regulatory bodies supports compliance, enhances market credibility, and positions ELISA as a preferred diagnostic solution in POCT markets

worldwide, driving sustained revenue growth and market leadership. Healthcare providers prioritize POCT solutions capable of delivering comprehensive diagnostic panels for multiple analytes, supporting holistic patient management and treatment decisions. ELISA's multiplexing capabilities enable simultaneous detection of diverse biomarkers, pathogens, and therapeutic targets, meeting clinical demands for integrated diagnostic information. ELISA manufacturers innovate multiplex ELISA platforms tailored for POCT applications, addressing evolving healthcare needs for rapid, accurate, and actionable diagnostic insights, thereby capturing market share and fostering customer loyalty.

Key Market Challenges

High Cost of Development and Maintenance

The development of ELISA assays requires significant investment in research, validation, and regulatory compliance, contributing to high upfront costs.

Small and medium-sized enterprises (SMEs) and academic institutions may face financial barriers to entering the market or developing new ELISA technologies. Cost constraints limit innovation and product diversification, potentially restricting market growth as companies navigate pricing pressures and profitability margins.

Competition from Alternative Technologies

Alternative diagnostic technologies, such as molecular diagnostics (PCR, NGS) and point-of-care testing (POCT), offer advantages in terms of sensitivity, speed, and ease of use.

ELISA faces competition in specific applications where rapid turnaround times or higher sensitivity are critical, impacting market share and adoption rates. Manufacturers must differentiate ELISA assays through technological advancements, such as multiplexing or integration with AI, to maintain relevance and competitive positioning amidst evolving market preferences.

Regulatory Challenges and Compliance Burden

Stringent regulatory requirements, varying by region (e.g., FDA in the US, CE marking in Europe), necessitate rigorous validation studies, documentation, and quality assurance processes for ELISA products.

Regulatory complexities increase time-to-market and operational costs, particularly for global market expansion and compliance with changing standards. Companies may encounter delays in product approvals, limiting market access and hindering the introduction of new ELISA assays or platforms, thereby affecting growth potential in competitive markets..

Key Market Trends

Advancements in Multiplexing Technology

Multiplexing allows simultaneous detection of multiple analytes within a single sample, offering increased efficiency and cost-effectiveness in diagnostic and research settings.

Laboratories and research facilities benefit from reduced sample volume requirements, faster turnaround times, and enhanced data accuracy, driving demand for multiplex ELISA kits. Companies investing in multiplex ELISA technology stand to capture market share by meeting the growing demand for comprehensive diagnostic solutions across various disease areas.

Integration of Artificial Intelligence (AI) and Machine Learning (ML)

AI and ML algorithms enhance data analysis, interpretation, and predictive modeling capabilities in ELISA assays, improving diagnostic accuracy and efficiency.

Pharmaceutical companies benefit from AI-driven insights into biomarker discovery, drug efficacy evaluation, and patient stratification, optimizing therapeutic interventions and clinical trial outcomes. ELISA assay developers collaborating with AI technology providers gain a competitive edge by offering intelligent diagnostic solutions that deliver actionable insights, fostering industry partnerships and driving market growth through innovation.

Segmental Insights

Type Insights

Based on the category of Type, the Sandwich ELISA segment emerged as the dominant in the global market for Enzyme Linked Immunosorbent Assay in 2023. Sandwich ELISA is based on the principle of using two antibodies that bind to different

epitopes on the antigen, thereby sandwiching the target molecule. It is highly versatile and widely used in clinical diagnostics, pharmaceutical research, and various other industries for detecting and quantifying specific proteins, hormones, antibodies, and antigens. Sandwich ELISA is known for its high sensitivity, capable of detecting very low concentrations of analytes in complex biological samples. It offers excellent specificity, distinguishing between closely related molecules with minimal cross-reactivity. It can be adapted to detect a wide range of analytes, including cytokines, hormones, infectious agents, and tumor markers. Researchers can customize the assay by selecting specific antibodies tailored to the target analyte, enhancing its applicability across different research and diagnostic settings.

Sandwich ELISA has been a well-established and trusted methodology in laboratories worldwide for decades. Its reliability, reproducibility, and robustness have made it the method of choice in clinical laboratories and research institutions. Advances in automation have streamlined the assay process, reduced hands-on time and improving throughput. Integration with multiplexing technologies allows simultaneous detection of multiple analytes in a single sample, further enhancing its utility and cost-effectiveness. These factors collectively contribute to the growth of this segment.

Regional Insights

North America emerged as the dominant in the global Enzyme Linked Immunosorbent Assay market in 2023, holding the largest market share in terms of value. North America, particularly the United States and Canada, boasts advanced healthcare infrastructure with a high concentration of clinical laboratories, research institutions, and biotechnology companies. These countries have historically been early adopters of new diagnostic technologies, including ELISA, driven by strong research funding, healthcare investments, and a high demand for accurate diagnostic tools. Major biotechnology and pharmaceutical hubs in cities like Boston, San Francisco, and Toronto foster innovation and drive R&D activities related to ELISA technology. Collaboration between academia, industry, and government institutions promotes advancements in assay development, improving sensitivity, specificity, and throughput of ELISA assays.

North America faces significant healthcare challenges related to chronic diseases such as cancer, cardiovascular diseases, and infectious diseases. ELISA plays a crucial role in disease diagnosis, monitoring, and screening due to its reliability, sensitivity, and ability to detect specific biomarkers associated with these conditions. The region adheres to stringent regulatory standards set by agencies like the FDA in the United States and Health Canada, ensuring high product quality and safety. Efficient approval

processes for diagnostic assays encourage market entry and innovation, supporting a competitive landscape for ELISA manufacturers.

Key Market Players

Thermo Fisher Scientific Inc

Bio-Rad Laboratories, Inc

Agilent Technologies, Inc

Merck KGaA

Promega Corporation

Neogen Corporation

F. Hoffmann-La Roche Ltd

Siemens Healthineers AG

Becton, Dickinson and Company

BioMérieux SA

Report Scope:

In this report, the Global Enzyme Linked Immunosorbent Assay Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Enzyme Linked Immunosorbent Assay Market, By Type:

Direct ELISA

Indirect ELISA

Sandwich ELISA

Enzyme Linked Immunosorbent Assay Market, By Application:

Disease diagnosis

Vaccine Development

Other

Enzyme Linked Immunosorbent Assay Market, By End User:

Hospitals

Research & Academic Institutions

Enzyme Linked Immunosorbent Assay Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Enzyme Linked Immunosorbent Assay Market.

Available Customizations:

Global Enzyme Linked Immunosorbent Assay market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Enzyme Linked Immunosorbent Assay Market – Global Industry Size, Share, Trends, Opportunity, & Forecast Segmen...

Detailed analysis and profiling of additional market players (up to five).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL ENZYME LINKED IMMUNOSORBENT ASSAY MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Direct ELISA, Indirect ELISA, Sandwich ELISA)
 - 5.2.2. By Application (Disease diagnosis, Vaccine Development, Other)
 - 5.2.3. By End User (Hospitals, Research & Academic Institutions)
 - 5.2.4. By Region

- 5.2.5. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA ENZYME LINKED IMMUNOSORBENT ASSAY MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By Application
 - 6.2.3. By End User
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Enzyme Linked Immunosorbent Assay Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By Application
 - 6.3.1.2.3. By End User
 - 6.3.2. Canada Enzyme Linked Immunosorbent Assay Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By Application
 - 6.3.2.2.3. By End User
 - 6.3.3. Mexico Enzyme Linked Immunosorbent Assay Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By Application
 - 6.3.3.2.3. By End User

7. EUROPE ENZYME LINKED IMMUNOSORBENT ASSAY MARKET OUTLOOK

- 7.1. Market Size & Forecast

- 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By Application
 - 7.2.3. By End User
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Enzyme Linked Immunosorbent Assay Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Type
 - 7.3.1.2.2. By Application
 - 7.3.1.2.3. By End User
 - 7.3.2. United Kingdom Enzyme Linked Immunosorbent Assay Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Type
 - 7.3.2.2.2. By Application
 - 7.3.2.2.3. By End User
 - 7.3.3. Italy Enzyme Linked Immunosorbent Assay Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Type
 - 7.3.3.2.2. By Application
 - 7.3.3.2.3. By End User
 - 7.3.4. France Enzyme Linked Immunosorbent Assay Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Type
 - 7.3.4.2.2. By Application
 - 7.3.4.2.3. By End User
 - 7.3.5. Spain Enzyme Linked Immunosorbent Assay Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast

- 7.3.5.2.1. By Type
- 7.3.5.2.2. By Application
- 7.3.5.2.3. By End User

8. ASIA-PACIFIC ENZYME LINKED IMMUNOSORBENT ASSAY MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Type

8.2.2. By Application

8.2.3. By End User

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Enzyme Linked Immunosorbent Assay Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Type

8.3.1.2.2. By Application

8.3.1.2.3. By End User

8.3.2. India Enzyme Linked Immunosorbent Assay Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Type

8.3.2.2.2. By Application

8.3.2.2.3. By End User

8.3.3. Japan Enzyme Linked Immunosorbent Assay Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Type

8.3.3.2.2. By Application

8.3.3.2.3. By End User

8.3.4. South Korea Enzyme Linked Immunosorbent Assay Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Type

8.3.4.2.2. By Application

8.3.4.2.3. By End User

8.3.5. Australia Enzyme Linked Immunosorbent Assay Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Type

8.3.5.2.2. By Application

8.3.5.2.3. By End User

9. SOUTH AMERICA ENZYME LINKED IMMUNOSORBENT ASSAY MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Type

9.2.2. By Application

9.2.3. By End User

9.2.4. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Enzyme Linked Immunosorbent Assay Market Outlook

9.3.1.1. Market Size & Forecast

9.3.1.1.1. By Value

9.3.1.2. Market Share & Forecast

9.3.1.2.1. By Type

9.3.1.2.2. By Application

9.3.1.2.3. By End User

9.3.2. Argentina Enzyme Linked Immunosorbent Assay Market Outlook

9.3.2.1. Market Size & Forecast

9.3.2.1.1. By Value

9.3.2.2. Market Share & Forecast

9.3.2.2.1. By Type

9.3.2.2.2. By Application

9.3.2.2.3. By End User

9.3.3. Colombia Enzyme Linked Immunosorbent Assay Market Outlook

9.3.3.1. Market Size & Forecast

- 9.3.3.1.1. By Value
- 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Type
 - 9.3.3.2.2. By Application
 - 9.3.3.2.3. By End User

10. MIDDLE EAST AND AFRICA ENZYME LINKED IMMUNOSORBENT ASSAY MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Type
 - 10.2.2. By Application
 - 10.2.3. By End User
 - 10.2.4. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Enzyme Linked Immunosorbent Assay Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Type
 - 10.3.1.2.2. By Application
 - 10.3.1.2.3. By End User
 - 10.3.2. Saudi Arabia Enzyme Linked Immunosorbent Assay Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Type
 - 10.3.2.2.2. By Application
 - 10.3.2.2.3. By End User
 - 10.3.3. UAE Enzyme Linked Immunosorbent Assay Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Type
 - 10.3.3.2.2. By Application
 - 10.3.3.2.3. By End User

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Developments
- 12.2. Product Launches
- 12.3. Mergers & Acquisitions

13. GLOBAL ENZYME LINKED IMMUNOSORBENT ASSAY MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

- 14.1. Thermo Fisher Scientific Inc
 - 14.1.1. Business Overview
 - 14.1.2. Financials (If Listed)
 - 14.1.3. Product & Service Offerings
 - 14.1.4. Recent Developments
 - 14.1.5. Key Personnel
 - 14.1.6. SWOT Analysis
- 14.2. Bio-Rad Laboratories, Inc
- 14.3. Agilent Technologies, Inc
- 14.4. Merck KGaA
- 14.5. Promega Corporation
- 14.6. Neogen Corporation
- 14.7. F. Hoffmann-La Roche Ltd
- 14.8. Siemens Healthineers AG
- 14.9. Becton, Dickinson and Company
- 14.10. BioMérieux SA

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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