

Europe Automated Sample Preparation Market By Product Type (Kits & Consumables and Instruments), By Application (Research & Development and Diagnostics), By End User (Biotechnology & Pharmaceutical Companies, Clinical & Diagnostic Laboratories and Academic & Research Institutions), By Country, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Europe Automated Sample Preparation Market was valued at USD 402.11 Million in 2024 and is expected to reach USD 659.39 Million by 2030 with a CAGR of 8.55% during the forecast period. The Europe Automated Sample Preparation market is primarily driven by advancements in laboratory automation, the increasing demand for high-throughput analysis, and the need for consistent and reproducible results. The rising complexity of testing methods across industries such as pharmaceuticals, biotechnology, food safety, and environmental testing fuels the adoption of automated solutions. Automation reduces human error, increases efficiency, and enhances productivity, allowing laboratories to handle large volumes of samples with minimal manual intervention. The increasing focus on personalized medicine and genomics is propelling the demand for precise and rapid sample preparation. Regulatory requirements for standardized procedures and quality control are also pushing laboratories to implement automated systems. The market is further supported by the growing need for cost-effective and time-efficient solutions in research and diagnostics.

Key Market Drivers

Focus on Reducing Human Error and Improving Accuracy

One of the most important reasons why the European automated sample preparation market is expanding is the ability of automation to reduce human error and improve the accuracy of results. In laboratory environments, human error can be costly and detrimental to research outcomes. Variations in sample handling, inconsistencies in measurements, contamination, or failure to follow standard protocols can lead to erroneous results, compromising the integrity of research or delaying product development. Manual sample preparation is especially vulnerable to such issues, as it relies on human judgment and consistency. Automated sample preparation systems remove the variable of human error by standardizing and replicating processes, leading to more accurate and reproducible results. These systems are programmed to follow precise protocols and specifications for each task, ensuring that every sample is processed with the same level of care and attention. This standardization not only reduces the risk of errors but also enables researchers and laboratory professionals to have greater confidence in their results. In highly regulated industries, such as pharmaceuticals and biotechnology, the importance of maintaining quality control and adhering to regulatory standards cannot be overstated. By automating sample preparation, laboratories ensure that each step meets the regulatory requirements, contributing to the accuracy and integrity of the research process. The ability to reduce human error and improve the overall precision of sample preparation workflows will continue to drive the market, particularly in fields that require stringent quality assurance processes.

Regulatory Compliance and Standardization

Regulatory compliance and standardization play a significant role in driving the Europe automated sample preparation market, particularly within the pharmaceutical, clinical, and medical research sectors. Many industries operate under strict regulatory frameworks that mandate adherence to specific standards in order to ensure safety, efficacy, and quality. In the European Union, regulatory bodies such as the European Medicines Agency (EMA) and other national authorities have established stringent guidelines for the preparation and testing of samples used in drug development, clinical trials, and diagnostic procedures. The automation of sample preparation helps laboratories maintain compliance with these regulations by ensuring that procedures are standardized and consistent. Automated systems follow pre-programmed protocols and maintain precise records of all steps taken during sample preparation, allowing for easy traceability and documentation—a key component of regulatory compliance. By automating sample preparation, companies can mitigate the risk of non-compliance,

avoid costly fines, and prevent delays in the approval process for new drugs or medical devices. As global markets demand greater standardization, particularly in clinical trials and diagnostic labs, the need for automated solutions will increase, further driving the demand for automated sample preparation systems. Automation ensures that processes are executed with the utmost precision and consistency, which is essential to meet regulatory requirements. As a result, the market for automated sample preparation is expected to continue expanding as industries strive for both efficiency and regulatory compliance.

Labor Shortages and Increasing Labor Costs

Labor shortages and rising labor costs are increasingly motivating laboratories and research institutions to adopt automated sample preparation systems across Europe. In several European countries, the healthcare, pharmaceutical, and research sectors are facing a shortage of skilled labor, which is hampering productivity and limiting the capacity for handling high volumes of samples. As the demand for scientific research, drug testing, and medical diagnostics continues to grow, these labor shortages create challenges for companies looking to expand or meet production and testing targets. Automated sample preparation systems can help mitigate the impact of labor shortages by enabling laboratories to process larger quantities of samples with fewer personnel. These systems reduce the reliance on human operators for repetitive and labor-intensive tasks, freeing up skilled workers for more complex or specialized duties. Automation helps to address rising labor costs by minimizing the need for additional personnel. With the cost of hiring and training skilled labor continuing to rise, investing in automation becomes an increasingly attractive option for laboratories looking to optimize their resources and maintain competitive advantage. As labor shortages and cost pressures persist, the demand for automated sample preparation solutions will continue to rise in Europe, further driving market growth.

Increased Focus on Personalized Medicine and Precision Diagnostics

The rise of personalized medicine and precision diagnostics is a significant driver for the adoption of automated sample preparation systems in Europe. Personalized medicine involves tailoring medical treatments to the individual characteristics of each patient, including their genetic makeup, lifestyle, and environment. Precision diagnostics, which involves identifying diseases and conditions with high accuracy, requires a thorough understanding of the patient's unique biological profile. Both personalized medicine and precision diagnostics rely heavily on the accurate and efficient analysis of biological samples. Automated sample preparation is an essential part of these advanced

healthcare practices as it ensures that samples are consistently prepared for testing and analysis. Automated systems help reduce the time and labor associated with sample processing, enabling laboratories to handle large volumes of personalized medical data quickly and accurately. In September 2022, SCIENION and its subsidiary Cellenion, both part of the bioconvergence powerhouse BICO, announced the launch of the proteoCHIP LF 48. This chip is the first commercially available solution that facilitates reproducible, automated miniaturized single-cell proteomics sample preparation and offers a standardized workflow for label-free single-cell mass spectrometry-based proteomics analysis. The proteoCHIP LF 48 was developed in collaboration with the Research Institute of Molecular Pathology in Vienna, Austria.

With the increasing demand for personalized treatments, particularly in oncology, genomics, and rare diseases, the market for automated sample preparation is expected to grow. The ability of automation to support the intricate workflows required for precision diagnostics and personalized medicine will make it an indispensable tool for laboratories, driving the adoption of these technologies across Europe.

Growing Research and Development Activities in Pharmaceuticals

The growing research and development (R&D) activities in the pharmaceutical industry are another significant driver of the European automated sample preparation market. The pharmaceutical industry continues to focus on innovation, developing new drugs and treatments for a variety of diseases and conditions. R&D activities are particularly critical in the discovery and development of new therapies, as they involve extensive testing, analysis, and sample processing. In November 2022, MGI, a company dedicated to advancing core tools and technology in life sciences, announced the introduction of its latest MGISP-Smart 8 automated sample preparation system to Europe, along with the first iteration of its Empowerment Program, at the MEDICA Trade Fair held from November 14-17 in Düsseldorf. Automated sample preparation systems support R&D by enabling laboratories to handle large volumes of samples with high consistency and accuracy. The ability to process and prepare samples quickly and efficiently accelerates the R&D process, reducing time to market for new drugs. The automation of sample preparation processes reduces the likelihood of human error, ensuring that results are reproducible and reliable. With pharmaceutical companies increasingly focusing on the development of biologics, gene therapies, and other cutting-edge treatments, the demand for automated sample preparation solutions will continue to rise. This will further fuel the growth of the European automated sample preparation market, as pharmaceutical companies look for ways to streamline their R&D processes and bring new therapies to market faster.

Increased Adoption of Laboratory Information Management Systems (LIMS)

The increasing adoption of Laboratory Information Management Systems (LIMS) across European laboratories is another key driver of the market for automated sample preparation systems. LIMS are software solutions that help laboratories manage samples, track data, and streamline workflows. By integrating automated sample preparation systems with LIMS, laboratories can improve sample tracking, reduce errors, and ensure regulatory compliance. The ability to integrate automated sample preparation with LIMS allows laboratories to maintain a seamless flow of information, ensuring that samples are properly prepared, analyzed, and documented throughout the testing process. This integration enhances the efficiency and productivity of laboratory operations, allowing for faster turnaround times and improved accuracy in sample preparation. As more laboratories adopt LIMS to manage their operations, the need for automated sample preparation solutions will increase, contributing to the overall growth of the market. The integration of LIMS and automation systems will continue to be a key trend, supporting the increased adoption of automated sample preparation technologies in Europe.

Key Market Challenges

High Initial Investment and Operational Costs

One of the main challenges limiting the growth of the automated sample preparation market in Europe is the high initial investment required for purchasing automated systems. These systems are typically sophisticated, high-tech equipment designed to handle complex laboratory tasks, such as sample extraction, purification, and analysis. As a result, the cost of acquiring such automated systems can be prohibitively expensive, particularly for smaller laboratories or research institutions with limited budgets. The high initial cost is not just limited to the acquisition of the equipment itself; it also includes the cost of installation, training, and maintenance. The operational costs for these systems can be significant, especially when it comes to ensuring they are running efficiently, minimizing downtime, and maintaining the necessary regulatory compliance.

Smaller laboratories, startups, or emerging biotech companies might find it financially challenging to invest in automation, as it requires upfront capital that could otherwise be directed to other aspects of their operations, such as research, hiring skilled personnel, or acquiring raw materials. Some laboratories might not have the technical expertise to

fully utilize these systems, leading to inefficiencies or the inability to maximize the systems' potential. Even for larger, established institutions, the high cost may slow down the adoption rate of automated sample preparation systems, as these companies must balance the investment in automation with other financial priorities, such as workforce management or R&D activities. The financial burden of these systems remains a significant obstacle that can delay widespread adoption and limit the potential market growth.

Lack of Standardization Across Systems

Another challenge facing the Europe automated sample preparation market is the lack of standardization across different automation systems. With various manufacturers and vendors offering different types of automated sample preparation solutions, there is a lack of uniformity in terms of software, hardware, and functionalities. As a result, laboratories may face difficulties when it comes to integrating these systems with their existing infrastructure or laboratory information management systems. Laboratories may use a combination of systems from different manufacturers, but these systems may not always work seamlessly together, leading to data incompatibility and inefficiencies.

This issue is particularly relevant for laboratories that are looking to expand their automation capabilities or scale up operations. The absence of industry-wide standards can create friction when trying to adopt new systems or update old ones, making it harder for laboratories to keep up with technological advancements. The lack of standardization can make training staff more challenging, as employees may need to learn how to operate a variety of systems with different interfaces and workflows. Standardization issues can affect the scalability of automation solutions. As laboratories grow or change their operations, they might encounter difficulties in scaling up their automation systems, especially if the original system is not designed to handle the increased workload or integrate with newer technologies.

Key Market Trends

Increased Demand for High-Throughput Analysis

The growing demand for high-throughput analysis is one of the key drivers of the Europe Automated Sample Preparation Market. Across several industries such as pharmaceuticals, biotechnology, food safety, and environmental monitoring, there has been a shift towards large-scale data collection and processing. High-throughput analysis allows laboratories to process and analyze numerous samples in a shorter

period, which is crucial for industries that require rapid results to stay competitive. For instance, in pharmaceutical drug development, multiple biological samples must be processed quickly to identify potential drug candidates and their effects. Sysmex Europe launched its new three-part differential system, the 'XQ-320 XQ-Series Automated Hematology Analyzer,' to address the needs of the high-volume market segment. The XQ-320 brought excellence in quality to various clinical laboratory environments with reliable technology and improved usability. Users had the opportunity to experience the new instrument firsthand at the EuroMedLab exhibition in Munich, Germany, from April 11 to 13, 2022.

The growing number of clinical trials and the demand for personalized medicine are pushing laboratories to scale their operations. Automated sample preparation solutions significantly improve the efficiency and speed of sample processing. They minimize human intervention, reduce the chance of error, and increase sample throughput, which in turn helps businesses maintain the pace needed to stay competitive. Many of the new diagnostic methods rely on massive data sets and involve high-throughput technologies, such as next-generation sequencing, which requires efficient sample preparation. Automated sample preparation systems are particularly valuable as they allow laboratories to process and prepare samples for such advanced technologies while ensuring that the results are reliable and consistent. As industries continue to move towards data-intensive and high-volume analyses, automated sample preparation systems will continue to play a crucial role in the overall workflow, thus driving market growth.

Technological Advancements in Automation

Technological advancements in automation are a primary force behind the growth of the Europe Automated Sample Preparation Market. Over the past few years, automation technologies have evolved significantly, leading to a transformation in laboratories and research institutions. Early systems primarily focused on simple tasks like pipetting or liquid handling. However, advancements have led to systems that are capable of handling complex tasks, including sample extraction, purification, and analysis, often with minimal human intervention. These sophisticated systems utilize robotic arms, sensors, and artificial intelligence to perform a wide range of tasks that once required human operators. In November 2021, Sysmex Europe GmbH recently announced the launch of its Sample Preparation System PS-10 for in vitro diagnostic (IVD) use in the EMEA region. The PS-10 automates sample preparation in clinical flow cytometry laboratories, streamlining workflows and reducing manual labor. This innovation not only lightens the staff's workload but also simplifies documentation and contributes to

the standardization of clinical flow cytometry testing. Integration of artificial intelligence and machine learning further enhances these systems by enabling them to adapt and learn from the data they process. For example, AI algorithms can optimize workflow, identify patterns, and suggest improvements in the sample preparation process. Machine learning can also predict potential failures or issues in the preparation process, allowing operators to proactively address challenges before they occur. These technologies not only improve the efficiency of sample preparation but also allow for more intricate and reliable workflows that support research and testing processes in high-complexity environments. As technological developments continue, laboratories and research institutions are expected to seek more advanced automated solutions to keep up with the increasing demands of scientific research, contributing to the continued expansion of the European automated sample preparation market.

Segmental Insights

Product Type Insights

Based on the product type, instruments are currently dominating over kits and consumables. This dominance can be attributed to the technological advancements and increased demand for automation in laboratories that require high precision, efficiency, and reproducibility in sample preparation. Instruments in this market category include automated liquid handling systems, robotic arms, and multi-functional sample processors that streamline tasks such as pipetting, extraction, and mixing. These instruments, designed for high throughput and accuracy, are central to the modern laboratory setup and are considered integral in improving the consistency and speed of sample processing.

Several factors contribute to the dominance of instruments in the market, including the growing complexity of sample preparation, the shift towards high-throughput processing, and the need for precision. In pharmaceutical, biotechnology, and academic research environments, the volume and complexity of samples are increasing, driving the demand for automated instruments that can handle large numbers of samples while minimizing human error. Automated sample preparation systems ensure that laboratories meet regulatory standards and maintain high levels of reproducibility and accuracy, both of which are crucial in clinical trials and pharmaceutical production. This is particularly important in the life sciences sector, where high precision is required to ensure that results are consistent across multiple experiments. Instruments are often seen as a long-term investment due to their high durability and versatility. Unlike consumables, which are used up and need to be replenished frequently, automated

instruments can be used over a prolonged period, making them a more cost-effective option for laboratories in the long run. These instruments are also highly adaptable, with software and system upgrades that allow them to be customized for various sample preparation tasks. This flexibility makes them an attractive choice for research institutions and pharmaceutical companies that require versatile and efficient systems.

Application Insights

Based on the application, research and development is currently the dominant sector over diagnostics. The key drivers behind this trend include the increasing demand for high-throughput processes, advancements in scientific research, and the growing complexity of biological samples being studied. Research and development activities, particularly in the pharmaceutical, biotechnology, and academic research sectors, are at the forefront of driving the demand for automated sample preparation systems. These sectors require sophisticated tools that enable researchers to manage large volumes of samples quickly, accurately, and with high precision requirements that automated sample preparation systems are uniquely capable of fulfilling.

One of the major contributing factors to the dominance of research and development is the rapid expansion of the pharmaceutical and biotechnology industries in Europe. With the constant need for new drug discovery, biologics, and personalized medicine, researchers are increasingly relying on automated sample preparation technologies to support their experimental workflows. Automated systems enable high-throughput screening of potential drug candidates, accelerated research timelines, and more reproducible experimental outcomes. These technologies are essential for tasks such as DNA and RNA extraction, protein analysis, and high-content screening, which are foundational in research and development pipelines. The ability to automate these tasks reduces human error, increases reproducibility, and frees up time for researchers to focus on more complex aspects of their studies.

The shift towards personalized medicine has further fueled the demand for automated sample preparation systems in research and development. Personalized medicine often involves the use of genetic, genomic, and molecular data to tailor treatments to individual patients, which necessitates large-scale, high-throughput data generation from biological samples. This requires the processing of complex samples, such as blood, tissue biopsies, and DNA/RNA, which need to be prepared in a highly consistent and reproducible manner. Automated systems not only enhance the precision of sample preparation but also allow for processing vast numbers of samples in a shorter time frame, which is crucial in research environments that focus on individualized treatments

and therapies.

Country Insights

Germany was dominating the Europe Automated Sample Preparation Market. This is due to a combination of factors including Germany's advanced healthcare infrastructure, strong research and development ecosystem, significant investments in biopharmaceutical industries, and its well-established position in the life sciences and diagnostic sectors. Germany has long been a leader in technological innovations and automation, particularly in industries like pharmaceuticals, biotechnology, and diagnostics, making it the frontrunner in the European automated sample preparation market.

Germany's dominance in the Automated Sample Preparation Market can be attributed to its robust healthcare system, which is one of the most sophisticated in Europe. The country has a well-established regulatory framework that ensures the continuous development and implementation of high-quality medical technologies, including automated systems for sample preparation. The healthcare sector in Germany is supported by substantial government investment, as well as collaborations between public research institutions, private enterprises, and international organizations. This collaborative environment fosters an ecosystem where new technologies and systems, like automated sample preparation, can be rapidly integrated into medical and laboratory practices.

The pharmaceutical and biotechnology industries in Germany are another key driver of the market's growth. Germany is home to several global pharmaceutical and biotechnology giants, as well as a large number of innovative startups. These companies invest heavily in research and development, often requiring high-throughput sample preparation technologies to accelerate drug discovery, molecular research, and personalized medicine. As pharmaceutical companies continue to push for more efficient and scalable processes in drug discovery, automated sample preparation systems have become crucial. These systems help streamline workflows, reduce human error, and enable researchers to process a large number of samples quickly, which is essential in fields like genomics, proteomics, and personalized medicine.

Key Market Players

F. Hoffmann-La Roche Ltd

Metrohm AG

QIAGEN N.V.

Tecan Trading AG

SOTAX AG

Promega GmbH

Hitachi High-Tech Europe GmbH

Labman Automation Ltd.

Shimadzu France SAS

Agilent Technologies Deutschland GmbH

Report Scope:

In this report, the Europe Automated Sample Preparation Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

· Europe Automated Sample Preparation Market, By Product Type:

Kits & Consumables

Instruments

· Europe Automated Sample Preparation Market, By Application:

Research & Development

Diagnostics

· Europe Automated Sample Preparation Market, By End User:

Biotechnology & Pharmaceutical Companies

Clinical & Diagnostic Laboratories

Academic & Research Institutions

· Europe Automated Sample Preparation Market, By Country:

Germany

France

United Kingdom

Italy

Spain

Russia

Poland

Bulgaria

Finland

Portugal

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe Automated Sample Preparation Market.

Available Customizations:

Europe Automated Sample Preparation Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

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