

# **New Frontiers in the European Automated Microbiology Markets: Business Challenges, Emerging Technologies, Competitive Landscape**

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## **Abstracts**

Complete report \$19,850. DataPack (test volumes, sales forecasts, supplier shares) \$12,900.

New Frontiers in the European Automated Microbiology Markets: Business Challenges, Emerging Technologies, Competitive Land scape is Venture Planning Group's new five-country strategic analysis of the major business opportunities emerging in the automated microbiology market during the next five years. The report examines key trends in major European countries (France, Germany, Italy, Spain, UK); reviews current and emerging assays; analyzes potential applications of innovative diagnostic technologies; forecasts volume and sales for molecular diagnostic, microbial identification, antibiotic susceptibility, blood culture, urine screening and immunodiagnostic procedures, as well as over 100 infectious disease tests by assay, application, market segment, and country; profiles leading players and potential market entrants; and suggests alternative business expansion strategies for suppliers.

## **Rationale**

The level of automation in the microbiology laboratory has been lagging behind that of other major clinical laboratory segments, such as chemistry and hematology. The slow acceptance of the technology is in part due to the complexity of developing automation suitable for microbiology tests.

The introduction of automated microbiology instrumentation has been delayed by a number of intrinsic and technical problems. The diffusion of automated microbiology systems, once the technology was developed, has not matched that of other automated

laboratory technologies. The acquisition of automation in microbiology has been slowed by forces less easily identifiable than the effects of various reimbursement plans. Some laboratorians still believe that current instrumentation is not the ultimate technology and expect better automation on the horizon.

The driving force behind the need for rapid reporting of microbiological test results is the clinical relevance in a time of financial austerity, a time when cost and health care effectiveness to the patient and diagnostician looms ever larger, and where after-the-fact results at high expense are coming under severe scrutiny worldwide.

This comprehensive five-country report will assist diagnostics industry executives, as well as companies planning to diversify into the dynamic and rapidly expanding microbiology market, in evaluating emerging opportunities and developing effective business strategies.

### **Geographic Coverage**

France, Germany, Italy, Spain, UK

### **Supplier Shares, Sales and Volume Forecasts**

Sales and market shares of major suppliers of microbiology products, by country and individual test.

Five-year test volume and sales forecasts for over 100 microbiology assays by country.

Test volume estimates by method (molecular, serology/immunodiagnostics, culture/microscopy).

### **European Market Overview**

Review of the market dynamics, trends, structure, size, growth and major suppliers by country.

Estimated universe of laboratories performing microbiology testing by country.

Specimen, test volume and sales forecasts by country.

## **Business Opportunities and Strategic Recommendations**

Emerging opportunities for new analyzers, reagents kits, IT and other products with significant market appeal during the next five years.

Design criteria for decentralized testing products.

Alternative market penetration strategies.

Potential market entry barriers and risks.

## **Specimen Types**

Urine

Sterile Fluids: Blood, Serum, CSF

Throat Swabs, Respiratory Secretions

Genital Secretions

Stool

Abscess/Wound

Sputum

Saliva

## **Applications**

Microbial Identification

Antibiotic Susceptibility

Urine Screening

Blood Cultures

## **Review of Major Automated Systems**

Review of major automated molecular diagnostic, multipurpose, specialized, microbial identification, antibiotic susceptibility, blood culture, urine screening, and immunodiagnostic analyzers.

The report features analyzers manufactured by Abbott, Alifax, Anagen, BD, Beckman Coulter/Danaher, Biochem, Biolog, bioMerieux, Bio-Rad, Biotrol, Cepheid, Curetis, GenMark, Hologic/Gen-Probe, HTG, Iris, J&J, Labsystems, Life Technologies, MiDI, Olympus, Qiagen, Roche, Siemens, Sy-Lab, Sysmex, Tecan, Thermo Fisher, Tosoh.

## **Infectious Diseases Analyzed in the Report**

AIDS/HIV, Adenovirus, Aeromonads, Bartonella, Blastocystis Hominis, Campylobacter, Candida, Chancroid, Chlamydia, Clostridium, Coronavirus, Coxsackievirus, Cryptosporidium, Cyclospora, CMV, E. Coli, Echovirus, Encephalitis, Enterovirus, EBV, Giardia, Gonorrhea, Granuloma Inguinale, Hantavirus, H. Pylori, Hepatitis, Herpes, Influenza, Legionella, Lyme, Lymphogranuloma, Malaria, Measles, Meningitis, Microsporidium, Mononucleosis, Mumps, Mycoplasma, HPV, Parvovirus, Pneumonia, Polyomaviruses, Pseudomonas, Rabies, RSV, Rhinovirus, Rotavirus, Rubella, Salmonella, Septicemia, Shigella, Staphylococci, Streptococci, Syphilis, Toxoplasmosis, Trichomonas, TB, Vibrio, West Nile, Yersinia and others.

## **Technology Assessment**

Assessment of molecular diagnostic, monoclonal antibody, immunoassay, and other technologies and their potential applications for the microbiology market.

Global listings of companies developing or marketing microbiology products by individual test.

## **Competitive Strategies**

Strategic assessments of major suppliers and start-up firms developing innovative technologies and products, including their sales, product portfolios, marketing tactics, collaborative arrangements, and new products in R&D.

### **The companies analyzed in the report include:**

Abbott

Affymetrix

Agilent Technologies

Applied Gene Technologies

Arca/Nuvelo

Beckman Coulter/Danaher

Becton Dickinson

Biokit

bioMérieux

Bio-Rad

Biotest

Caliper

Cepheid

Decode

Diadexus

Diamedix

DiaSorin

Eiken Chemical

Enzo Biochem

Exact Sciences

Fujirebio/Innogenetics

Hologic/Gen-Probe

Illumina

ID Biomedical/GSK

Kreatech

Li-Cor Biosciences

Lonza

Monogram Biosciences

Myriad Genetics

Nanogen/Elitech

Novartis Diagnostics/Grifols

Orchid CellMark

Ortho-Clinical Diagnostics

Proteome Sciences

Qiagen

Roche

Scienion

Sequenom

SeraCare

Siemens

Sierra Molecular

Shimadzu

Takara Bio

Tecan

Thermo Fisher/Life Technology

Wallac/PE

Wako

Contains 600 pages and 257 tables

## Contents

### I. Introduction

### II. Worldwide Market and Technology Overview

#### A. Introduction

1. Major Factors Affecting Market Penetration of Microbiology Instrumentation
2. Traditional Practices
3. Technological Challenges
4. Automation: Impact on the Microbiology Laboratory and the Patient

#### B. Major Specimen Types

1. Urine
2. Sterile Fluids: Blood, Serum, and CSF
3. Throat Swabs and Respiratory Secretions
4. Genital Secretions
5. Stool
6. Abscess/Wound
7. Sputum
8. Saliva

#### C. Test Applications

1. Microbial Identification
2. Antibiotic Susceptibility
3. Urine Screening
  - a. Photometry
  - b. Bioluminescence
  - c. Colorimetric Filtration
  - d. Enzymatic Detection
  - e. Optical Detection
4. Blood Cultures

#### D. Major Microbiology Automated and Semiautomated Systems

1. Multiple Purpose Microbiology Systems
2. Specialized Microbiology Systems
3. Molecular Diagnostic Systems
4. Immunodiagnostic Systems

#### E. Emerging Diagnostic Technologies

1. Molecular Diagnostics (Amplification Methods, Sequencing, Microarrays/Biochips)
  - a. DNA Sequencing  
Introduction



- Sequencing Methods
- Autoradiography
- The Human Genome Project
- Sequencing Automation
- Image Scanners
- Fluorescent Detection
- Gene Profiling
- Gene Expression
- Polymorphism Screening
- Protein Interaction Networks
- b. DNA And RNA Probe Technology
  - Basic Principles
  - Probe Preparation
  - The DNA Probe Test
    - Sample Preparation
    - Hybridization
    - Separation
    - Detection/Measurement
  - Test Formats
    - Filter Hybridization
    - Southern Blot
    - Northern Blot
    - In Situ Hybridization
    - Others
  - Labeling Techniques
  - Amplification Methods
    - Polymerase Chain Reaction
    - Temperature Cyclers
    - PCR Variations
      - Immuno-PCR
      - QC-PCR
      - DAP-PCR
    - Strand Displacement Activation
    - TMA
    - Ligase Chain Reaction
    - Branched DNA
    - Hybridization Protection Assay
    - Nucleic-Acid Sequence-Based Amplification
    - Self-Sustained Sequence Replicase

## Others

Ampliprobe

CAR

CAS

CPT

Dendritic Polymer Technology

ISO-CR

LAT

Probe

RAMP

Repair Chain Reaction

Rolling Circles

Sequence Independent Gene Amplification

Sequence Initiation Reaction

SISPA

Solid Phase Amplification

## c. Detection Technologies

### Radioactive Methods

Overview

Major Isotopes

P-32

S-35

H-3

I-125

### Non-Isotopic Methods

Enzymatic Labels

Chemical Labeling

Indirect Chemical Labeling

Direct Chemical Labeling

Fluorescence

Chemiluminescence

Electrical Conductivity

## d. Biochips: Genosensors, Microarrays, and Labs-on-the-Chip

Liquid Transportation and Mixing

Separation

Reaction

Detection

## 2. Monoclonal Antibodies

## 3. Immunoassays

4. Differential Light Scattering
5. Information Technology
6. Artificial Intelligence
7. Liposomes
8. Flow Cytometry
9. Chromatography
10. Diagnostic Imaging
11. Gel Microdroplets
12. Other

### **III. France**

- A. Business Environment
- B. Market Structure
- C. Market Size, Growth and Major Supplier Sales and Market Shares

### **IV. Germany**

- A. Business Environment
- B. Market Structure
- C. Market Size, Growth and Major Supplier Sales and Market Shares

### **V. Italy**

- A. Business Environment
- B. Market Structure
- C. Market Size, Growth and Major Supplier Sales and Market Shares

### **VI. Spain**

- A. Business Environment
- B. Market Structure
- C. Market Size, Growth And Major Supplier Sales and Market Shares

### **VII. U.K.**

- A. Business Environment
- B. Market Structure
- C. Market Size, Growth and Major Supplier Sales and Market Shares

## **VIII. Major Product Development Opportunities**

## **IX. Design Criteria for Decentralized Testing Products**

## **X. Alternative Market Penetration Strategies**

- A. Internal Development
- B. Collaborative Arrangements
- C. University Contracts
- D. Distribution Strategies for Decentralized Testing Markets
  - 1. Marketing Approaches
  - 2. Product Complexity
  - 3. Customer Preference
  - 4. Established Suppliers
  - 5. Emerging Suppliers
  - 6. Major Types of Distributors
  - 7. Market Segmentation

## **XI. 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

## **XII. Competitive Assessments**

Abbott  
Affymetrix  
Agilent Technologies  
Applied Gene Technologies  
Arca/Nuvelo  
Beckman Coulter/Danaher  
Becton Dickinson  
Biokit

bioMerieux  
Bio-Rad  
Biotest  
Caliper  
Cepheid  
Decode  
Diadexus  
Diamedix  
DiaSorin  
Eiken Chemical  
Enzo Biochem  
Exact Sciences  
Fujirebio/Innogenetics  
Hologic/Gen-Probe  
Illumina  
ID Biomedical/GSK  
Kreatech  
Li-Cor Biosciences  
Lonza  
Monogram Biosciences  
Myriad Genetics  
Nanogen/Elitech  
Novartis Diagnostics/Grifols  
Orchid CellMark  
Ortho-Clinical Diagnostics  
Proteome Sciences  
Qiagen  
Roche  
Scienion  
Sequenom  
SeraCare  
Siemens  
Sierra Molecular  
Shimadzu  
Takara Bio  
Tecan  
Thermo Fisher/Life Technologies  
Wallac/PE  
Wako



## List Of Tables

### LIST OF TABLES

Major Companies Developing or Marketing AIDS Tests  
Major Companies Developing or Marketing Adenovirus Tests  
Major Companies Developing or Marketing Bartonella Tests  
Major Companies Developing or Marketing Campylobacter Tests  
Major Companies Developing or Marketing Candida Tests  
Major Companies Developing or Marketing Chlamydia Tests  
Major Companies Developing or Marketing Clostridium Tests  
Major Companies Developing or Marketing Coronavirus Tests  
Major Companies Developing or Marketing Cryptosporidium Tests  
Major Companies Developing or Marketing CMV Tests  
Major Companies Developing or Marketing Echovirus Tests  
Major Companies Developing or Marketing Enterovirus Tests  
Major Companies Developing or Marketing EBV Tests  
Major Companies Developing or Marketing Giardia Tests  
Major Companies Developing or Marketing Gonorrhea Tests  
Major Companies Developing or Marketing Hantavirus Tests  
Major Companies Developing or Marketing Helicobacter Pylori Tests  
Major Companies Developing or Marketing Hepatitis Tests  
Major Companies Developing or Marketing Herpes Tests  
Major Companies Developing or Marketing Influenza Tests  
Major Companies Developing or Marketing Legionella Tests  
Major Companies Developing or Marketing Lyme Disease Tests  
Major Companies Developing or Marketing Lymphogranuloma Tests  
Major Companies Developing or Marketing Malaria Tests  
Major Companies Developing or Marketing Measles Tests  
Major Companies Developing or Marketing Meningitis Tests  
Major Companies Developing or Marketing Microsporidium Tests  
Major Companies Developing or Marketing Mononucleosis Tests  
Major Companies Developing or Marketing Mumps Tests  
Major Companies Developing or Marketing Mycoplasma Tests  
Major Companies Developing or Marketing Papilloma Virus Tests  
Major Companies Developing or Marketing Parvovirus Tests  
Major Companies Developing or Marketing Pneumonia Tests  
Major Companies Developing or Marketing RSV Tests  
Major Companies Developing or Marketing Rotavirus Tests

Major Companies Developing or Marketing Rubella Tests  
Major Companies Developing or Marketing Salmonella Tests  
Major Companies Developing or Marketing Septicemia Tests  
Major Companies Developing or Marketing Shigella Tests  
Major Companies Developing or Marketing Staphylococci Tests  
Major Companies Developing or Marketing Streptococci Tests  
Major Companies Developing or Marketing Syphilis Tests  
Major Companies Developing or Marketing Toxoplasmosis Tests  
Major Companies Developing or Marketing Trichomonas Tests  
Major Companies Developing or Marketing Tuberculosis Tests  
Major Companies Developing or Marketing West Nile Tests  
Major Companies Developing or Marketing Yersinia Tests  
France Laboratories Performing Microbiology Tests by Market Segment  
France Hospital Laboratories Performing Microbiology Tests by Bed Size  
France Commercial/Private Laboratories Performing Microbiology Tests by Annual Test Volume  
France All Market Segments Microbiology Specimen Volume  
France Hospital Laboratories Microbiology Specimen Volume  
France Commercial/Private Laboratories Microbiology Specimen Volume  
France Microbiology Test Volume by Market Segment  
France Microbiology Test Volume by Application  
France Blood Culture Test Volume by Market Segment  
France Microbial Identification Test Volume by Market Segment  
France Urine Screening Test Volume by Market Segment  
France Antibiotic Susceptibility Test Volume by Market Segment  
France Microbiology Consumables Market by Application  
France Microbiology Consumables Market by Market Segment  
France Microbial Identification Consumables Sales by Market Segment  
France Blood Culture Consumables Sales by Market Segment  
France Antibiotic Susceptibility Consumables Sales by Market Segment  
France Urine Screening Consumables Sales by Market Segment  
France All Market Segments Infectious Disease Test Volume Forecast by Assay  
France All Market Segments Infectious Disease Diagnostics Market Forecast by Test  
France Infectious Disease Blood Screening NAT Volume Forecast by Assay  
France Infectious Disease Blood Screening NAT Reagent Market Forecast by Assay  
France HIV/AIDS Testing Market Diagnostics Sales by Major Supplier  
France HIV/Hepatitis Blood Screening NAT Market Diagnostics Sales by Major Supplier  
France Adenovirus Testing Market Diagnostics Sales by Major Supplier  
France Campylobacter Testing Market Diagnostics Sales by Major Supplier



France Candida Testing Market Diagnostics Sales by Major Supplier  
France Chlamydia Testing Market Diagnostics Sales by Major Supplier  
France CMV Testing Market Diagnostics Sales by Major Supplier  
France Gonorrhea Testing Market Diagnostics Sales by Major Supplier  
France Hepatitis Testing Market Diagnostics Sales by Major Supplier  
France Hepatitis C Testing Market Diagnostics Sales by Major Supplier  
France Herpes Testing Market Diagnostics Sales by Major Supplier  
France Lyme Disease Testing Market Diagnostics Sales by Major Supplier  
France Influenza Testing Market Diagnostics Sales by Major Supplier  
France Meningitis Testing Market Diagnostics Sales by Major Supplier  
France Mononucleosis Testing Market Diagnostics Sales by Major Supplier  
France Mumps Testing Market Diagnostics Sales by Major Supplier  
France Mycoplasma Testing Market Diagnostics Sales by Major Supplier  
France RSV Testing Market Diagnostics Sales by Major Supplier  
France Rotavirus Testing Market Diagnostics Sales by Major Supplier  
France Rubella Testing Market Diagnostics Sales by Major Supplier  
France Septicemia Testing Market Diagnostics Sales by Major Supplier  
France Shigella Testing Market Diagnostics Sales by Major Supplier  
France Streptococci Testing Market Diagnostics Sales by Major Supplier  
France Syphilis Testing Market Diagnostics Sales by Major Supplier  
France Toxoplasmosis Testing Market Diagnostics Sales by Major Supplier  
France Trichomonas Testing Market Diagnostics Sales by Major Supplier  
France Tuberculosis Testing Market Diagnostics Sales by Major Supplier  
France Molecular Diagnostics Market Sales and Shares of Major Suppliers  
Germany Laboratories Performing Microbiology Tests by Market Segment  
Germany Hospital Laboratories Performing Microbiology Tests by Bed Size  
Germany Commercial/Private Laboratories Performing Microbiology Tests by Annual Test Volume  
Germany All Market Segments Microbiology Specimen Volume  
Germany Hospital Laboratories Microbiology Specimen Volume  
Germany Commercial/Private Laboratories Microbiology Specimen Volume  
Germany Microbiology Test Volume by Market Segment  
Germany Microbiology Test Volume by Application  
Germany Urine Screening Test Volume by Market Segment  
Germany Microbial Identification Test Volume by Market Segment  
Germany Antibiotic Susceptibility Test Volume by Market Segment  
Germany Blood Culture Test Volume by Market Segment  
Germany Microbiology Consumables Market by Application  
Germany Microbiology Consumables Market by Market Segment

Germany Microbial Identification Consumables Sales by Market Segment  
Germany Antibiotic Susceptibility Consumables Sales by Market Segment  
Germany Blood Culture Consumables Sales by Market Segment  
Germany Urine Screening Consumables Sales by Market Segment  
Germany All Market Segments Infectious Disease Test Volume Forecast by Assay  
Germany All Market Segments Infectious Disease Diagnostics Market Forecast by Test  
Germany Infectious Disease Blood Screening NAT Volume Forecast by Assay  
Germany Infectious Disease Blood Screening NAT Reagent Market Forecast by Assay  
Germany HIV/AIDS Testing Market Diagnostics Sales by Major Supplier  
Germany HIV/Hepatitis Blood Screening NAT Market Diagnostics Sales by Major Supplier  
Germany Campylobacter Testing Market Diagnostics Sales by Major Supplier  
Germany Candida Testing Market Diagnostics Sales by Major Supplier  
Germany CMV Testing Market Diagnostics Sales by Major Supplier  
Germany EBV Testing Market Diagnostics Sales by Major Supplier  
Germany Gonorrhea Testing Market Diagnostics Sales by Major Supplier  
Germany Hepatitis Testing Market Diagnostics Sales by Major Supplier  
Germany Hepatitis C Testing Market Diagnostics Sales by Major Supplier  
Germany Herpes Testing Market Diagnostics Sales by Major Supplier  
Germany Influenza Testing Market Diagnostics Sales by Major Supplier  
Germany Legionella Testing Market Diagnostics Sales by Major Supplier  
Germany Meningitis Testing Market Diagnostics Sales by Major Supplier  
Germany Mononucleosis Testing Market Diagnostics Sales by Major Supplier  
Germany Mycoplasma Testing Market Diagnostics Sales by Major Supplier  
Germany Pneumonia Testing Market Diagnostics Sales by Major Supplier  
Germany RSV Testing Market Diagnostics Sales Forecast by Major Supplier  
Germany Rotavirus Testing Market Diagnostics Sales by Major Supplier  
Germany Rubella Testing Market Diagnostics Sales by Major Supplier  
Germany Septicemia Testing Market Diagnostics Sales by Major Supplier  
Germany Streptococci Testing Market Diagnostics Sales by Major Supplier  
Germany Toxoplasmosis Testing Market Diagnostics Sales by Major Supplier  
Germany Trichomonas Testing Market Diagnostics Sales by Major Supplier  
Germany Tuberculosis Testing Market Diagnostics Sales by Major Supplier  
Germany Molecular Diagnostics Market Sales and Shares of Major Suppliers  
Italy Laboratories Performing Microbiology Tests by Market Segment  
Italy Hospital Laboratories Performing Microbiology Tests by Bed Size  
Italy Commercial/Private Laboratories Performing Microbiology Tests by Annual Test Volume  
Italy All Market Segments Microbiology Specimen Volume

Italy Hospital Laboratories Microbiology Specimen Volume  
Italy Commercial/Private Laboratories Microbiology Specimen Volume  
Italy Microbiology Test Volume by Market Segment  
Italy Microbiology Test Volume by Application  
Italy Microbial Identification Test Volume by Market Segment  
Italy Urine Screening Test Volume by Market Segment  
Italy Antibiotic Susceptibility Test Volume by Market Segment  
Italy Blood Culture Test Volume by Market Segment  
Italy Microbiology Consumables Market by Application  
Italy Microbiology Consumables Market by Market Segment  
Italy Microbial Identification Consumables Sales by Market Segment  
Italy Antibiotic Susceptibility Consumables Sales by Market Segment  
Italy Blood Culture Consumables Sales by Market Segment  
Italy Urine Screening Consumables Sales by Market Segment  
Italy All Market Segments Infectious Disease Test Volume Forecast by Assay  
Italy All Market Segments Infectious Disease Diagnostics Market Forecast by Test  
Italy Infectious Disease Blood Screening NAT Volume Forecast by Assay  
Italy Infectious Disease Blood Screening NAT Reagent Market Forecast by Assay  
Italy HIV/AIDS Testing Market Diagnostics Sales by Major Supplier  
Italy HIV/Hepatitis Blood Screening NAT Market Diagnostics Sales by Major Supplier  
Italy Campylobacter Testing Market Diagnostics Sales by Major Supplier  
Italy Candida Testing Market Diagnostics Sales by Major Supplier  
Italy CMV Testing Market Diagnostics Sales by Major Supplier  
Italy Gonorrhea Testing Market Diagnostics Sales by Major Supplier  
Italy Hepatitis Testing Market Diagnostics Sales by Major Supplier  
Italy Hepatitis C Testing Market Diagnostics Sales by Major Supplier  
Italy Herpes Testing Market Diagnostics Sales by Major Supplier  
Italy Influenza Testing Market Diagnostics Sales by Major Supplier  
Italy Meningitis Testing Market Diagnostics Sales by Major Supplier  
Italy Mononucleosis Testing Market Diagnostics Sales by Major Supplier  
Italy Mycoplasma Testing Market Diagnostics Sales by Major Supplier  
Italy RSV Testing Market Diagnostics Sales by Major Supplier  
Italy Rotavirus Testing Market Diagnostics Sales by Major Supplier  
Italy Rubella Testing Market Diagnostics Sales by Major Supplier  
Italy Septicemia Testing Market Diagnostics Sales by Major Supplier  
Italy Streptococci Testing Market Diagnostics Sales by Major Supplier  
Italy Toxoplasmosis Testing Market Diagnostics Sales by Major Supplier  
Italy Trichomonas Testing Market Diagnostics Sales by Major Supplier  
Italy Tuberculosis Testing Market Diagnostics Sales by Major Supplier

Italy Molecular Diagnostics Market Sales and Shares of Major Suppliers  
Spain Laboratories Performing Microbiology Tests by Market Segment  
Spain Hospital Laboratories Performing Microbiology Tests by Bed Size  
Spain Commercial/Private Laboratories Performing Microbiology Tests by Annual Test Volume  
Spain All Market Segments Microbiology Specimen Volume  
Spain Hospital Laboratories Microbiology Specimen Volume  
Spain Commercial/Private Laboratories Microbiology Specimen Volume  
Spain Microbiology Test Volume by Market Segment  
Spain Microbiology Test Volume by Application  
Spain Microbial Identification Test Volume by Market Segment  
Spain Urine Screening Test Volume by Market Segment  
Spain Blood Culture Test Volume by Market Segment  
Spain Antibiotic Susceptibility Test Volume by Market Segment  
Spain Microbiology Consumables Market by Application  
Spain Microbiology Consumables Market by Market Segment  
Spain Microbial Identification Consumables Sales by Market Segment  
Spain Blood Culture Consumables Sales by Market Segment  
Spain Antibiotic Susceptibility Consumables Sales by Market Segment  
Spain Urine Screening Consumables Sales by Market Segment  
Spain All Market Segments Infectious Disease Test Volume Forecast by Assay  
Spain All Market Segments Infectious Disease Diagnostics Market Forecast by Test  
Spain Infectious Disease Blood Screening NAT Volume Forecast by Assay  
Spain Infectious Disease Blood Screening NAT Reagent Market Forecast by Assay  
Spain HIV/AIDS Testing Market Diagnostics Sales by Major Supplier  
Spain HIV/Hepatitis Blood Screening NAT Market Diagnostics Sales by Major Supplier  
Spain Chlamydia Testing Market Diagnostics Sales by Major Supplier  
Spain CMV Testing Market Diagnostics Sales by Major Supplier  
Spain Hepatitis Testing Market Diagnostics Sales by Major Supplier  
Spain Hepatitis C Testing Market Diagnostics Sales by Major Supplier  
Spain Herpes Testing Market Diagnostics Sales by Major Supplier  
Spain Influenza Testing Market Diagnostics Sales by Major Supplier  
Spain Lyme Disease Testing Market Diagnostics Sales by Major Supplier  
Spain Meningitis Testing Market Diagnostics Sales by Major Supplier  
Spain Mononucleosis Testing Market Diagnostics Sales by Major Supplier  
Spain Mycoplasma Testing Market Diagnostics Sales by Major Supplier  
Spain RSV Testing Market Diagnostics Sales by Major Supplier  
Spain Rotavirus Testing Market Diagnostics Sales by Major Supplier  
Spain Rubella Testing Market Diagnostics Sales by Major Supplier



Spain Septicemia Testing Market Diagnostics Sales by Major Supplier  
Spain Streptococci Testing Market Diagnostics Sales by Major Supplier  
Spain Syphilis Testing Market Diagnostics Sales by Major Supplier  
Spain Toxoplasmosis Testing Market Diagnostics Sales by Major Supplier  
Spain Trichomonas Testing Market Diagnostics Sales by Major Supplier  
Spain Tuberculosis Testing Market Diagnostics Sales by Major Supplier  
Spain Molecular Diagnostics Market Sales and Shares of Major Suppliers  
U.K. Laboratories Performing Microbiology Tests by Market Segment  
U.K. Hospital Laboratories Performing Microbiology Tests by Bed Size  
U.K. Commercial/Private Laboratories Performing Microbiology Tests by Annual Test Volume  
U.K. All Market Segments Microbiology Specimen Volume  
U.K. Hospital Laboratories Microbiology Specimen Volume  
U.K. Public Health Laboratories Microbiology Specimen Volume  
U.K. Commercial/Private Laboratories Microbiology Specimen Volume  
U.K. Microbiology Test Volume by Market Segment  
U.K. Microbiology Test Volume by Application  
U.K. Microbial Identification Test Volume by Market Segment  
U.K. Urine Screening Test Volume by Market Segment  
U.K. Antibiotic Susceptibility Test Volume by Market Segment  
U.K. Blood Culture Test Volume by Market Segment  
U.K. Microbiology Consumables Market by Application  
U.K. Microbiology Consumables Market by Market Segment  
U.K. Microbial Identification Consumables Sales by Market Segment  
U.K. Antibiotic Susceptibility Consumables Sales by Market Segment  
U.K. Blood Culture Consumables Sales by Market Segment  
U.K. Urine Screening Consumables Sales by Market Segment  
U.K. All Market Segments Infectious Disease Test Volume Forecast by Assay  
U.K. All Market Segments Infectious Disease Diagnostics Market Forecast by Test  
U.K. Infectious Disease Blood Screening NAT Volume Forecast by Assay  
U.K. Infectious Disease Blood Screening NAT Reagent Market Forecast by Assay  
U.K. HIV/AIDS Testing Market Diagnostics Sales by Major Supplier  
U.K. HIV/Hepatitis Blood Screening NAT Market Diagnostics Sales by Major Supplier  
U.K. Campylobacter Testing Market Diagnostics Sales by Major Supplier  
U.K. Candida Testing Market Diagnostics Sales by Major Supplier  
U.K. Gonorrhea Testing Market Diagnostics Sales by Major Supplier  
U.K. Hepatitis Testing Market Diagnostics Sales by Major Supplier  
U.K. Hepatitis C Testing Market Diagnostics Sales by Major Supplier  
U.K. Influenza Testing Market Diagnostics Sales by Major Supplier

U.K. Mycoplasma Testing Market Diagnostics Sales by Major Supplier  
U.K. Pneumonia Testing Market Diagnostics Sales by Major Supplier  
U.K. RSV Testing Market Diagnostics Sales by Major Supplier  
U.K. Rubella Testing Market Diagnostics Sales by Major Supplier  
U.K. Septicemia Testing Market Diagnostics Sales by Major Supplier  
U.K. Shigella Testing Market Diagnostics Sales by Major Supplier  
U.K. Streptococci Testing Market Diagnostics Sales by Major Supplier  
U.K. Syphilis Testing Market Diagnostics Sales by Major Supplier  
U.K. Tuberculosis Testing Market Diagnostics Sales by Major Supplier  
U.K. Molecular Diagnostics Market Sales and Shares of Major Suppliers

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