

GLOBAL NUCLEIC ACID TESTING MARKET
New Product Development Opportunities and Business Expansion
Strategies for Instrument and Reagent Suppliers

Table of Contents

Introduction

Worldwide Market And Technology Overview

A. DNA Sequencing

1. **Introduction**
2. **Sequencing Methods**
3. **Autoradiography**
4. **The Human Genome Project**
5. **Sequencing Automation**
6. **Image Scanners**
7. **Fluorescent Detection**
8. **Gene Profiling**
9. **Gene Expression**
10. **Polymorphism Screening**
11. **Protein Interaction Networks**

B. DNA And RNA Probe Technology

1. **Basic Principles**
2. **Probe Preparation**
3. **The DNA Probe Test**
 - a. **Sample Preparation**
 - b. **Hybridization**
 - c. **Separation**
 - d. **Detection/Measurement**
4. **Test Formats**
 - a. **Filter Hybridization**
 - b. **Southern Blot**
 - c. **Northern Blot**
 - d. **In Situ Hybridization**
 - e. **Others**
5. **Labeling Techniques**
6. **Amplification Methods**
 - o **Polymerase Chain Reaction**
 - **Temperature Cyclers**

Table of Contents (continued)

- PCR Variations
 - * Immuno-PCR
 - * QC-PCR
 - * DAP-PCR
 - o Strand Displacement Activation
 - o TMA
 - o Ligase Chain Reaction
 - o Branched DNA
 - Hybridization Protection Assay
 - o Nucleic-Acid Sequence-Based Amplification
 - o Self-Sustained Sequence Replicase
 - o Others
 - Ampliprobe
 - CAR
 - CAS
 - CPT
 - Dendritic Polymer Technology
 - ISO-CR
 - LAT
 - Probe Networks
 - RAMP
 - Repair Chain Reaction
 - Rolling Circles
 - Sequence Independent Gene Amplification
 - Sequence Initiation Reaction
 - SISPA
- C. Detection Technologies
1. Radioactive Methods
 - a. Overview
 - b. Major Isotopes
 - o P-32
 - o S-35
 - o H-3
 - o I-125
 2. Non-Isotopic Methods
 - a. Enzymatic Labels
 - b. Chemical Labeling
 - o Indirect Chemical Labeling
 - o Direct Chemical Labeling

Table of Contents (continued)

- c. Fluorescence
- d. Chemiluminescence
- e. Electrical Conductivity
- D. Instrumentation Review
 - 1. Abbott LCx
 - 2. Autogenomics Infinity
 - 3. Beckman Coulter/Biomek FK
 - 4. Becton Dickinson SDA
 - 5. Bio-Rad GeneScope
 - 6. Gen-Probe Tigris
 - 7. Nanosphere Verigen Series
 - 8. Roche Cobas AmpliCor
 - 9. Tecan LS Series
- E. Biochips: Genosensors, Microarrays, and Labs-on-the-Chip
 - Liquid Transportation and Mixing
 - Separation
 - Reaction
 - Detection
- F. Pharmacogenomics
- G. Major Applications
 - 1. Microbiology/Infectious Diseases
 - a. Overview
 - b. Major Infectious Diseases
 - * AIDS
 - o Structure and Composition
 - o Classification
 - o AIDS Origins
 - o Animal Lentivirus Systems
 - o Virus Receptors
 - o HIV Infections in Humans
 - Pathogenesis and Pathology
 - o CD4T Lymphocytes and Memory Cells
 - o Monocytes and Macrophages
 - o Lymphoid Organs
 - o Neural Cells
 - o Viral Coinfections
 - Clinical Findings
 - o Plasma Viral Load

Table of Contents (continued)

- *Pediatric AIDS*
 - *Neurologic Disease*
 - *Opportunistic Infections*
 - *Cancer*
- *Immunity*
- *Laboratory Diagnosis*
 - *Virus Isolation*
 - *Serology*
 - *Viral Nucleic Acid/Antigen Detection*
- *Epidemiology*
 - *Worldwide Spread of AIDS*
 - *United States*
 - *Routes of Transmission*
- *Prevention, Treatment, And Control*
 - *Antiviral Drugs*
 - *Vaccines*
- *Transmission HIV in Blood Products*
- *HIV Transmission in Transplant and Artificial Insemination Recipients*
- *Diagnostic Tests*
 - *Enzyme Immunoassay Interpretation*
 - *Specificity, Sensitivity and Predictive Value*
- *Competition Assays*
- *Western Blot Technique*
- *Immuno-Fluorescence Assays (IFA)*
- *Radioimmunoprecipitation*
- *HIV-1/HIV-2 Combination Testing*
- *Methods of HIV-Antigen Detection*
- *Antigen Assays and Blood Screening*
- *Urine Tests*
- *DNA Probes*
 - *Overview*
 - *Quantitative PCR*
 - *In Situ PCR*
 - *Needed Improvements*
- *Viral Load/Drug Resistance Testing*
- *Genotype and Phenotype Testing*
- *Blood Banking Considerations*

Table of Contents (continued)

- * **Adenovirus**
 - Background
 - Diagnostic Tests
 - Vaccines and Drugs
 - Adeno-Associated Viruses (AAV)
- * **Anthrax/Bacillus Anthracis**
 - Background
 - Diagnostic Tests
 - Vaccines and Drugs
- * **Babesiosis**
 - Background
- * **BEA and Other Bartonella Diseases**
 - Background
 - Diagnostic Tests
 - Vaccines and Drugs
- * **Chagas Disease**
 - Background
- * **Campylobacter**
 - Background
 - Diagnostic Tests
 - Culture Identification
 - Vaccines and Drugs
- * **Chlamydia**
 - Background
 - Chlamydia psittaci
 - Chlmaydia pneumoniae
 - Chlamydia trachomatis
 - Diagnostic Tests
 - Vaccines and Drugs
- * **Creutzfeldt-Jakob's Disease**
 - Background
 - Blood Transmission
 - Diagnostic Tests
 - Major Commercial and Academic Players
 - Bayer
 - Disease Sciences/Bio Tec Global
 - Imperial College School of Medicine
 - Ortho-Clinical Diagnostics

Table of Contents (continued)

- *Pall*
- *ProMetic Life Sciences*
- *Proteome Sciences/Idexx*
- *Q-One Biotech*
- *Serono*
- *U.S. Agricultural Research Service*
- o *Drugs*
- o *Vaccines*
- * *Cytomegalovirus*
 - o *Background*
 - *Chorioretinitis*
 - *Gastrointestinal*
 - *Central Nervous System Disease*
 - o *Diagnostic Tests*
 - o *Vaccines and Drugs*
- * *Ebola Virus*
 - o *Background*
 - *Epidemiology*
 - *Clinical Syndromes*
 - o *Diagnostic Tests*
 - o *Vaccines and Drugs*
- * *EchoVirus*
 - o *Background*
 - *Acute Aseptic Meningitis*
 - *Encephalitis*
 - *Exanthems*
 - *Respiratory Disease*
 - *Myopericarditis*
 - *Neonatal Infections*
 - o *Diagnostic Tests*
 - o *Vaccines and Drugs*
- * *Encephalitis*
 - o *Background*
 - o *Diagnostic Tests*
 - o *Vaccines and Drugs*
- * *Enteroviruses*
 - o *Background*
 - o *Diagnostic Tests*
 - *Viral Isolation and Identification*
 - *Antibody Tests*
 - o *Vaccines and Drugs*

Table of Contents (continued)

- * *Epstein-Barr Virus*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Gonorrhea*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Hepatitis*
 - *Hepatitis A*
 - *Hepatitis B*
 - *Structure and Composition*
 - *Replication*
 - *Hepatitis C*
 - *Hepatitis D (Delta)*
 - *Hepatitis E*
 - *Hepatitis G*
 - *Hepatitis Infections Pathology*
 - *Clinical Findings*
 - *Laboratory Tests*
 - *Hepatitis A*
 - *Hepatitis B*
 - *Hepatitis C*
 - *Hepatitis D*
 - *Hepatitis E*
 - *Virus-Host Immune Reactions*
 - *Epidemiology*
 - *Hepatitis A*
 - *Hepatitis B*
 - *Hepatitis C*
 - *Hepatitis D (Delta)*
 - *Vaccines and Drugs*
- * *Herpes Simplex Virus*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*

Table of Contents (continued)

- * *Legionella*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Lyme Disease*
 - *Background*
 - *Clinical Description*
 - *Clinical Case Definition*
 - *Laboratory Criteria for Diagnosis*
 - *Case Classification*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Malaria*
- * *Mycoplasma*
 - *Background*
 - *Ureaplasma Urealyticum & Mycoplasma Hominis*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Papillomaviruses/HPV*
 - *Background*
 - *HPV in Cancer*
 - *Cervical Neoplasm*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
 - *Prevention*
- * *Parvovirus B19*
 - *Background*
 - *Microbiology*
 - *Epidemiology*
 - *Clinical Syndromes*
 - *Erythema Infectiosum (Slapped Cheek)*
 - *Adult Polyarthropathy*
 - *Transient Aplastic Crisis*
 - *Transient Pancytopenia*
 - *Red Cell Aplasia in Immunocompromised*
 - *Perinatal Infections*
 - *Diagnostic Test*
 - *Vaccines and Drugs*

Table of Contents (continued)

- * *Pneumonia*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Polyomaviruses*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Salmonellosis*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Shigellosis*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Streptococci*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
 - *Group A Streptococci*
 - *Group B Streptococci*
- * *Toxoplasmosis*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- * *Tuberculosis*
 - *Background*
 - *Diagnostic Tests*
 - *Microscopic Characteristics*
 - *Cultural Characteristics*
 - *Skin Tests*
 - *MDRTB*
 - *Vaccines and Drugs*
- * *West Nile Virus*
 - *Background*
 - *Clinical Syndromes*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*

Table of Contents (continued)

- * *Yersinia*
 - *Background*
 - *Diagnostic Tests*
 - *Vaccines and Drugs*
- c. *Antibiotic Susceptibility*
- 2. *Cancer Testing*
 - a. *Overview*
 - b. *Major Cancer Types*
 - * *Prostate*
 - * *Lung*
 - * *Colon and Rectum*
 - * *Breast*
 - * *Skin*
 - * *Uterine*
 - * *Leukemia*
 - * *Oral*
 - c. *Oncogenes*
 - *Abl/abl-bcr*
 - *AIB1*
 - *BRCA1*
 - *CD44*
 - *C-fos*
 - *C-myb*
 - *C-myc*
 - *CYP17*
 - *Erb-B*
 - *HPC1*
 - *N-myc*
 - *P40*
 - *P51*
 - *P53*
 - *PIK3CA*
 - *PTI-1*
 - *Ras*
 - *Reg*
 - *Sis*
 - *Src*

Table of Contents (continued)

3. Genetic Diseases

- a. Overview
- b. Nucleic Acid Amplification
- c. Chromosome Imaging
- d. Genomics Technologies
- e. Proteomics Technologies
- f. Current Pharmacogenomic Tests
- g. Future Pharmacogenomic Testing
- h. Major Diseases
 - * Achondroplasia
 - * Autosomal Dominant Polycystic Kidney Disease
 - * Cancer
 - * Cosmetogenomics
 - * Cystic Fibrosis
 - * Down's Syndrome
 - * Duchenne and Becker Muscular Dystrophy
 - * Factor V (Leiden)
 - * Factor IX Deficiency
 - * Fragile X Syndrome
 - * Heart Disease
 - * Hemochromatosis
 - * Hemophilia
 - * Huntington's Disease
 - * Maternal-Fetal Incompatibility
 - * Multiple Endocrine Neoplasia
 - * Phenylketonuria (PKU)
 - * Polycystic Kidney Disease (PKD)
 - * Prenatal Screening
 - * Retinitis Pigmentosa
 - * Retinoblastoma
 - * Sickle Cell Anemia
 - * Spinal Muscular Atrophy
 - * Vitamin B12 Metabolism
- i. Social Issues and Concerns

4. Forensic Testing

- a. Overview

Table of Contents (continued)

- b. *Multilocus and Single Locus Probes*
 - * *Multilocus Probes*
 - * *Single Locus Probes*
 - * *PCR and RFLP*
- c. *The FBI*
- d. *DNA Profile Data Banks*
 - * *U.S.A.*
 - * *U.K.*
- e. *Judicial Implementation*
- f. *Major Crime Categories*
- g. *Factors Contributing to the DNA Probe Market Expansion*
 - * *Technology Availability*
 - * *Use of Hair as Evidence*
- h. *Wildlife Forensics*
- 5. *Paternity Testing/HLA Typing*
- 6. *Other Applications*
 - a. *Disease Susceptibility Testing*
 - b. *Cardiovascular Diseases*
 - c. *Diabetes*
 - d. *Alzheimer's Disease*
 - e. *Plasma Purification*
 - f. *Organ Transplantation*
 - g. *Water Contamination*
 - h. *Others*
- G. *Cost Analysis*
 - 1. *Equipment*
 - 2. *Consumables*
- H. *Competing/complementing Technologies*
 - 1. *Monoclonal Antibodies/Immunoassays*
 - 2. *RNA Probes*
 - 3. *Two-Dimensional Electrophoresis*
 - 4. *Flow Cytometry*
- I. *Reimbursement Issues*
- J. *Worldwide Market Overview*
 - 1. *Business Environment*
 - 2. *Market Structure*
 - 3. *Market Size and Growth*

Table of Contents (continued)

France

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth And Major Suppliers'
Sales And Market Shares

Germany

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth And Major Suppliers'
Sales And Market Shares

Italy

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth And Major Suppliers'
Sales And Market Shares

Japan

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth And Major Suppliers'
Sales And Market Shares

Spain

- A. Executive Summary
- B. Business Environment
- C. Market Structure
- D. Market Size, Growth And Major Suppliers'
Sales And Market Shares

U.K.

- A. Executive Summary
- B. Business Environment
- C. Market Structure

Table of Contents (continued)

*D. Market Size, Growth And Major Suppliers'
Sales And Market Shares*

U.S.A.

A. Executive Summary

B. Business Environment

1. Health Care Expenditures

2. Cost Consciousness

3. Reimbursement

4. Industry Consolidation

5. Managed Care

a. HMO

b. PPO

6. Hospitals

7. Admissions

8. Length of Stay

9. Industry Diversification

10. Physician Demographics

11. Population Aging

a. Chronic Illness

b. Disease Incidence

c. Susceptibility to Iatrogenesis

d. Multiple Illness Cases

12. Laboratory Regulations

13. FDA Reform

C. Market Structure

1. Hospitals

2. Commercial/Private Laboratories

3. Blood Banks

*D. Market Size, Growth and Major Suppliers'
Sales and Market Shares*

Major Product Development Opportunities

A. Instrumentation

B. Reagent Kits and Test Systems/panels

C. Computers, Software and Automation

D. Auxiliary Products

Table of Contents (continued)

Design Criteria For Decentralized Testing Products

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

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

Competitive Profiles

- Abbott
- Aclara
- Affymetrix
- Agilent
- Ambion
- Applera
- Applied Gene Technologies
- Beckman Coulter
- Becton Dickinson
- Biokit

Table of Contents (continued)

- *BioMerieux*
- *Biotest*
- *Boston Biomedica*
- *Caliper*
- *Cepheid*
- *Chiron*
- *Decode*
- *Diadexus*
- *Digene*
- *Eiken*
- *Enzo*
- *Exact Sciences*
- *Fujirebio*
- *Gen-Probe*
- *Gene Tec*
- *Illumina*
- *Innogenetics*
- *Kreatech*
- *Li-Cor*
- *Molecular Diagnostics*
- *Myriad Genetics*
- *Nanogen*
- *Nuvelo*
- *Orchid Biosciences*
- *Qiagen*
- *Roche*
- *Sangtec*
- *Sequenom*
- *Scienion*
- *Sierra Diagnostics*
- *Shimadzu*
- *Takara Bio*
- *Tepnel Life Sciences*
- *Tecan Group*
- *Third Wave*

Table of Contents (continued)

Appendixes

*Appendix I: Major Companies Developing or Marketing
NAT Reagents and Test Kits*

*Appendix II: Major Universities and Research Centers
Developing NAT Technologies*

Appendix III: Glossary of Terms

Appendix IV: Currency Exchange Rates

List of Tables

Major Companies Developing or Marketing Thermocyclers

*Major Companies Developing or Marketing AIDS NAT
And Other Direct Identification Tests*

*Major Companies Developing or Marketing Adenovirus
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Campylobacter
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Chlamydia
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing CMV NAT
And Other Direct Identification Tests*

*Major Companies Developing or Marketing EBV NAT
And Other Direct Identification Tests*

*Major Companies Developing or Marketing Gonorrhea
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Hepatitis
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Herpes
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Legionella
NAT And Other Direct Identification Tests*

List of Tables (continued)

*Major Companies Developing or Marketing Lyme
Disease NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Mycoplasma
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Papilloma
Virus NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Pneumonia
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Salmonella
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Shigella
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Streptococci
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Toxoplasmosis
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Tuberculosis
NAT And Other Direct Identification Tests*

*Major Companies Developing or Marketing Cancer
NAT Tests*

List of Tables (continued)

*Major Companies Developing or Marketing NAT Assays
For Genetic Diseases*

*Worldwide, Laboratories Performing DNA Sequencing
By Country*

Worldwide, NAT Market, Potential Laboratory Universe by Country

Worldwide, NAT Volume Forecast by Country

Worldwide, NAT Market Forecast by Country

*Summary Table France, NAT Volume And Sales Forecast
by Major Application*

*France, Laboratories Performing DNA Sequencing
By Market Segment*

*France, NAT Market Potential
Laboratory Universe by Market Segment*

France, NAT Volume Forecast By Major Application

France, Major Infectious Disease NAT Volume Forecast

*France, Infectious Disease Screening
NAT Volume Forecast*

France, NAT Market Forecast By Major Application

*France, Infectious Disease Screening NAT Reagent
Market Forecast by Test*

France, NAT Market By Major Supplier

List of Tables (continued)

France, HIV/Hepatitis NAT Market By Major Supplier

*Summary Table Germany, NAT Volume
And Sales Forecast by Major Application*

*Germany, Laboratories Performing
DNA Sequencing by Market Segment*

*Germany, NAT Market Potential Laboratory Universe
By Market Segment*

Germany, NAT Volume Forecast By Major Application

Germany, Major Infectious Disease NAT Volume Forecast

*Germany, Infectious Disease Screening
NAT Volume Forecast*

Germany, NAT Market Forecast By Major Application

*Germany, Infectious Disease Screening
NAT Reagent Market Forecast by Test*

Germany, NAT Market by Major Supplier

Germany, HIV/Hepatitis NAT Market by Major Supplier

*Summary Table Italy, NAT Volume
And Sales Forecast by Major Application*

*Italy, Laboratories Performing
DNA Sequencing by Market Segment*

List of Tables (continued)

*Italy, NAT Market Potential
Laboratory Universe by Market Segment*

Italy, NAT Volume Forecast By Major Application

Italy, Major Infectious Disease NAT Volume Forecast

*Italy, Infectious Disease Screening
NAT Volume Forecast*

Italy, NAT Market Forecast By Major Application

*Italy, Infectious Disease Screening
NAT Reagent Market Forecast by Test*

Italy, NAT Market By Major Supplier

*Italy, HIV/Hepatitis NAT Market
By Major Supplier*

*Summary Table Japan, NAT Volume
And Sales Forecast by Major Application*

*Japan, Laboratories Performing
DNA Sequencing by Market Segment*

*Japan, NAT Market Potential
Laboratory Universe by Market Segment*

Japan, NAT Volume Forecast By Major Application

Japan, Major Infectious Disease NAT Volume Forecast

*Japan, Infectious Disease Screening
NAT Volume Forecast*

List of Tables (continued)

Japan, NAT Market Forecast By Major Application

*Japan, Infectious Disease Screening NAT
Market Forecast by Test*

Japan, NAT Market By Major Supplier

Japan, HIV/Hepatitis NAT Market by Major Supplier

*Summary Table Spain, NAT Volume
And Sales Forecast by Major Application*

*Spain, Laboratories Performing
DNA Sequencing by Market Segment*

*Spain, NAT Market, Potential
Laboratory Universe by Market Segment*

Spain, NAT Volume Forecast by Major Application

Spain, Major Infectious Disease NAT Volume Forecast

*Spain, Infectious Disease Screening
NAT Volume Forecast*

Spain, NAT Market Forecast By Major Application

*Spain, Infectious Disease Screening NAT
Reagent Market Forecast by Test*

Spain, NAT Market By Major Supplier

Spain, HIV/Hepatitis NAT Market by Major Supplier

List of Tables (continued)

*Summary Table U.K., NAT Volume
And Sales Forecast by Major Application*

*U.K., Laboratories Performing
DNA Sequencing by Market Segment*

*U.K., NAT Market Potential
Laboratory Universe by Market Segment*

U.K., NAT Volume Forecast By Major Application

U.K., Major Infectious Disease NAT Volume Forecast

*U.K., Infectious Disease Screening
NAT Volume Forecast*

U.K., NAT Market Forecast By Major Application

*U.K., Infectious Disease Screening NAT Reagent
Market Forecast by Test*

U.K., NAT Market by Major Supplier

*Summary Table U.S.A., NAT Volume
And Sales Forecast by Major Application*

*U.S.A., Laboratories Performing
DNA Sequencing by Market Segment*

*U.S.A., NAT Market, Potential
Laboratory Universe by Market Segment*

U.S.A., NAT Volume Forecast By Major Application

U.S.A., Major Infectious Disease NAT Volume Forecast

List of Tables (continued)

*U.S.A., Infectious Disease Screening
NAT Volume by Test Forecast*

U.S.A., NAT Market Forecast By Major Application

*U.S.A., Infectious Disease Screening NAT Reagent
Market Forecast by Test*

U.S.A., NAT Market by Major Supplier

U.S.A., HIV/Hepatitis C NAT Market By Major Supplier

U.S.A., West Nile Virus NAT Market By Major Supplier