

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

Table of 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

Table of Contents (continued)

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

- o Polymerase Chain Reaction
 - Temperature Cyclers
 - PCR Variations
 - * Immuno-PCR
 - * QC-PCR
 - * DAP-PCR
- o Strand Displacement Activation
- o TMA
- o Ligase Chain Reaction

Table of Contents (continued)

- 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

Table of Contents (continued)

- 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

Table of Contents (continued)

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

Table of Contents (continued)

XII. Competitive Assessments

- Abbott
- Affymetrix
- Agilent Technologies
- Applied Gene Technologies
- Arca Biopharma
- Beckman Coulter/Danaher
- Becton Dickinson
- Biokit
- bioMerieux
- Bio-Rad
- Biotest
- Cepheid
- Decode Genetics
- Diadexus
- Diamedix
- DiaSorin
- Eiken Chemical
- Elitech Group
- Enzo Biochem
- Exact Sciences
- Fujirebio
- Grifols
- GSK Biologicals
- Hologic
- Illumina
- LabCorp
- Leica Biosystems
- Li-Cor Biosciences
- Lonza
- Myriad Genetics
- Ortho-Clinical Diagnostics
- PerkinElmer
- Proteome Sciences
- Qiagen
- Roche
- Scienion

Table of Contents (continued)

- Sequenom
- SeraCare
- Shimadzu
- Siemens Healthineers
- Sierra Molecular
- Takara Bio
- Tecan Group
- Thermo Fisher
- Wako

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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

List of Tables (continued)

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.
Gonorrhoea Testing Market Diagnostics Sales by Major Supplier

List of Tables (continued)

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