

Clinical Microbiology Market Size, Share & Trends by Application (Pharma, Food, Clinical, Manufacturing, Environment), Disease (Respiratory Disease, Blood Stream, GIT, UTI), Product (Instrument, Analyzer, Reagent), End User, and Region - Global Forecast to 2029

Market Report | 2024-05-29 | 339 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The Clinical microbiology market is projected to reach USD 6.9 billion by 2029 from USD 5.0 billion in 2024 with a CAGR of 6.5% during the forecast period. The clinical microbiology market is experiencing significant growth driven by recent technological advancements in disease diagnostics, such as rapid molecular testing and laboratory automation, aiding faster and more precise detection of infectious agents. Additionally, the rising global incidence of infectious diseases due to population growth, urbanization, and international travel is driving demand for advanced microbiology testing solutions. However, challenges including limited reimbursement policies for microbiology testing procedures and operational barriers like the need for skilled personnel and complex regulatory frameworks pose obstacles to market expansion, particularly in resource-constrained settings. Addressing these challenges will be crucial to improving accessibility and affordability of microbiology testing services worldwide.

"The Instruments segment accounted for a substantial share of the clinical microbiology market, by type in 2023."

The instruments segment is projected to dominate the clinical microbiology industry throughout the forecast period. This segment's substantial market share can be attributed to several factors. Firstly, there is significant adoption of conventional laboratory instruments by researchers and academia, with a notable increase in industry-academia collaborations focused on genomic research. Secondly, advancements in molecular techniques and proteomics, including innovations such as integrating microfluidics with PCR and applying nanotechnology to qPCR techniques, are driving the segment's growth. Lastly, the ongoing trend of laboratory automation among clinical laboratories is contributing to the expansion and prominence of the instruments segment within the clinical microbiology industry.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

" By Application Pharmaceutical Application segment accounted for the largest share in the healthcare clinical microbiology market."

The pharmaceuticals segment represents the largest application area within the clinical microbiology industry and is expected to maintain its dominance throughout the forecast period. This significant share can be primarily attributed to the presence of well-established and widely accepted regulations governing microbial contamination evaluation during pharmaceutical manufacturing and raw material procurement. Regulatory bodies such as the WHO, FDA, MHRA (UK), European Medicines Agency (EU), TGA (Australia), and ANVISA (Brazil) have defined stringent guidelines for assessing microbial contamination in excipients and active pharmaceutical ingredients (APIs) to ensure sterile drug manufacturing and microbial load testing of finished pharmaceutical products. Moreover, pharmaceutical manufacturing processes are rigorously monitored and controlled according to various pharmacopeias on a global scale. The increasing production volume of pharmaceutical drugs worldwide also contributes significantly to the growth of this application segment.

"North America to witness the substantial growth rate during the forecast period."

North America, which includes the United States and Canada, holds a leading position in the clinical microbiology market. This region is characterized by its maturity, marked by widespread use of clinical microbiology technologies among key end-users such as hospitals, research laboratories, diagnostic centers, and commercial service providers. Additionally, North America benefits from well-established distribution channels for manufacturers and suppliers of clinical microbiology products. The region's growth is propelled by factors including easy accessibility to and high adoption of advanced diagnostic technologies, supported by substantial per capita healthcare expenditure by the US and Canadian governments annually, along with favorable government regulations that foster industry development.

The break-down of primary participants is as mentioned below:

- By Company Type - Tier 1: 45%, Tier 2: 30%, and Tier 3: 25%
- By Designation - C-level: 42%, Director-level: 31%, and Others: 27%
- By Region - North America: 32%, Europe: 32%, Asia Pacific: 26%, ROW-10%

Key Players in the Clinical Microbiology Market

The prominent players in the global healthcare clinical microbiology market include BioMerieux (France), Danaher Corporation (US), Becton, Dickinson, and Company (BD) (US), Abbott (US), F. Hoffmann-La Roche Ltd. (Switzerland), Thermo Fisher Scientific Inc. (US), Agilent Technologies, Inc. (US), Bruker (US), Hologic, Inc. (US), Merck KGaA(Germany), Bio-Rad Laboratories, Inc.(US), QIAGEN(Netherlands), Shimadzu Corporation(Japan), Neogen Corporation (US), Siemens Healthineers AG (Germany). With Emerging players including, Hardy Diagnostics (US), EMSL Analytical, Inc. (US), Lofilchem S.R.L (Italy), TCS Biosciences (UK), Cole-Parmer Instrument Company, LLC (US), Memmert GmbH + Co.KG (Germany), Vacutest Kima S.r.l (Germany), Rapid Micro Biosystems, Inc. (US), Biotechnology Solutions TX, LLC (US), and Arrow Diagnostics Srl (Italy).

Research Coverage:

The report analyzes the Clinical microbiology market and aims to estimate the market size and future growth potential of various market segments, based on type, application, disease, end user, and region. The report also provides a competitive analysis of the key players operating in this market, along with their company profiles, product offerings, recent developments, and key market strategies.

Reasons to Buy the Report

This report will enrich established firms as well as new entrants/smaller firms to gauge the pulse of the market, which, in turn, would help them garner a greater share of the market. Firms purchasing the report could use one or a combination of the below-mentioned strategies to strengthen their positions in the market.

This report provides insights on:

- Analysis of Market Dynamics (Rising incidence of infectious diseases, technological advancements in disease diagnostics,), restraints (limited reimbursement policies for clinical microbiology testing products), opportunities (Improving healthcare

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

infrastructure among emerging economies), and challenges (operational barriers related to use of diagnostics tests)

-□Products/Innovations: Detailed insights on upcoming technologies, research & development activities, and new service launches in the Clinical microbiology market.

-□Market Development: Comprehensive information on the lucrative emerging markets, component, demographics , end-user, and region.

-□Market Diversification: Exhaustive information about the product portfolios, growing geographies, recent developments, and investments in the clinical microbiology market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, and capabilities of the leading players in the clinical microbiology market like BioMerieux (France), Danaher Corporation (US), Becton, Dickinson, and Company (BD) (US), Abbott (US), F. Hoffmann-La Roche Ltd. (Switzerland), Thermo Fisher Scientific Inc. (US), Agilent Technologies, Inc. (US), Bruker (US), Hologic, Inc. (US) among others.

Table of Contents:

1□INTRODUCTION□	40
1.1□STUDY OBJECTIVES□	40
1.2□MARKET DEFINITION□	40
1.2.1□INCLUSIONS & EXCLUSIONS□	41
TABLE 1□CLINICAL MICROBIOLOGY MARKET: INCLUSIONS & EXCLUSIONS□	41
1.3□STUDY SCOPE□	42
1.3.1□SEGMENTS COVERED□	42
FIGURE 1□CLINICAL MICROBIOLOGY MARKET: SEGMENTS COVERED□	42
1.3.2□REGIONS COVERED□	43
FIGURE 2□CLINICAL MICROBIOLOGY MARKET: REGIONS COVERED□	43
1.3.3□YEARS CONSIDERED□	43
FIGURE 3□CLINICAL MICROBIOLOGY MARKET: YEARS CONSIDERED□	43
1.3.4□CURRENCY CONSIDERED□	44
1.3.5□UNITS CONSIDERED□	44
1.4□STAKEHOLDERS□	44
1.5□SUMMARY OF CHANGES□	44
1.5.1□RECESSION IMPACT□	45
2□RESEARCH METHODOLOGY□	46
2.1□RESEARCH DATA□	46
FIGURE 4□CLINICAL MICROBIOLOGY MARKET: RESEARCH DESIGN□	46
2.1.1□SECONDARY DATA□	47
2.1.1.1□List of key secondary sources□	47
2.1.1.2□Key data from secondary sources□	48
2.1.1.3□Objectives of secondary research□	48
2.1.2□PRIMARY DATA□	49
FIGURE 5□KEY PRIMARY SOURCES FROM DEMAND AND SUPPLY SIDES□	49
2.1.2.1□Objectives of primary research□	49
2.1.2.2□Key data from primary sources□	50
TABLE 2□KEY DATA OBTAINED FROM PRIMARY SOURCES□	50
2.1.2.3□Key industry insights□	51
2.1.2.4□Breakdown of primaries□	51
FIGURE 6□BREAKDOWN OF PRIMARIES: SUPPLY- AND DEMAND-SIDE PARTICIPANTS□	51
FIGURE 7□BREAKDOWN OF PRIMARY INTERVIEWS: BY COMPANY TYPE, DESIGNATION, AND REGION□	52
2.2□MARKET SIZE ESTIMATION□	52

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.2.1	BOTTOM-UP APPROACH	53
2.2.1.1	Company revenue estimation approach	53
FIGURE 8	BOTTOM-UP APPROACH: COMPANY REVENUE ESTIMATION APPROACH	53
2.2.1.2	Company presentations and primary interviews	53
2.2.1.3	Growth forecast	54
2.2.1.4	CAGR projections	54
FIGURE 9	CAGR PROJECTIONS: SUPPLY-SIDE ANALYSIS	54
2.2.2	TOP-DOWN APPROACH	54
FIGURE 10	CLINICAL MICROBIOLOGY MARKET: TOP-DOWN APPROACH	55
2.3	MARKET BREAKDOWN & DATA TRIANGULATION	56
FIGURE 11	DATA TRIANGULATION	56
2.4	MARKET SHARE ANALYSIS	57
2.5	STUDY ASSUMPTIONS	57
2.6	GROWTH RATE ASSUMPTIONS	57
2.7	RESEARCH LIMITATIONS	58
2.7.1	METHODOLOGY-RELATED LIMITATIONS	58
2.7.2	SCOPE-RELATED LIMITATIONS	58
2.8	RISK ASSESSMENT	58
TABLE 3	CLINICAL MICROBIOLOGY MARKET: RISK ASSESSMENT	58
2.9	IMPACT OF ECONOMIC RECESSION ON CLINICAL MICROBIOLOGY MARKET	59
3	EXECUTIVE SUMMARY	61
FIGURE 12	CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2024 VS. 2029 (USD MILLION)	61
FIGURE 13	LABORATORY INSTRUMENTS MARKET, BY TYPE, 2024 VS. 2029 (USD MILLION)	62
FIGURE 14	MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2024 VS. 2029 (USD MILLION)	63
FIGURE 15	CLINICAL MICROBIOLOGY MARKET, BY END USER, 2024 VS. 2029 (USD MILLION)	63
FIGURE 16	REGIONAL SNAPSHOT OF CLINICAL MICROBIOLOGY MARKET	64
4	PREMIUM INSIGHTS	66
4.1	CLINICAL MICROBIOLOGY MARKET OVERVIEW	66
FIGURE 17	HIGH PREVALENCE OF INFECTIOUS DISEASES AND TECHNOLOGICAL ADVANCEMENTS TO DRIVE MARKET	66
4.2	EUROPE: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT AND COUNTRY (2023)	67
FIGURE 18	GERMANY AND INSTRUMENTS SEGMENT ACCOUNTED FOR LARGEST MARKET SHARE IN 2023	67
4.3	CLINICAL MICROBIOLOGY MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES	68
FIGURE 19	CHINA TO REGISTER HIGHEST GROWTH RATE DURING STUDY PERIOD	68
4.4	CLINICAL MICROBIOLOGY MARKET: REGIONAL MIX (2022-2029)	69
FIGURE 20	ASIA PACIFIC TO WITNESS HIGHEST GROWTH DURING FORECAST PERIOD	69
4.5	CLINICAL MICROBIOLOGY MARKET: DEVELOPED VS. EMERGING MARKETS (2024 VS. 2029)	69
FIGURE 21	EMERGING MARKETS TO REGISTER HIGHER GROWTH RATES DURING STUDY PERIOD	69
5	MARKET OVERVIEW	70
5.1	INTRODUCTION	70
5.2	MARKET DYNAMICS	70
FIGURE 22	CLINICAL MICROBIOLOGY MARKET: DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES	70
5.2.1	DRIVERS	71
5.2.1.1	Technological advancements in clinical diagnosis and novel molecular diagnostic-based instruments	71
5.2.1.2	Rising incidence of infectious diseases and epidemics	71
5.2.1.3	Increasing R&D programs and public-private investments	72
5.2.2	RESTRAINTS	73
5.2.2.1	Limited reimbursement policies for clinical microbiology testing procedures	73

5.2.3	OPPORTUNITIES	73
5.2.3.1	Improved healthcare infrastructure in emerging countries	73
5.2.4	CHALLENGES	74
5.2.4.1	Operational barriers to diagnostic microbiology tests in emerging countries	74
5.3	PRICING ANALYSIS	75
TABLE 4	AVERAGE SELLING PRICE FOR CLINICAL MICROBIOLOGY TESTING PRODUCTS, 2021-2023	75
FIGURE 23	AVERAGE SELLING PRICE OF CLINICAL MICROBIOLOGY INSTRUMENTS, BY REGION (USD THOUSAND)	77
TABLE 5	AVERAGE SELLING PRICE OF CLINICAL MICROBIOLOGY INSTRUMENTS, BY REGION, 2021-2023	77
5.4	PATENT ANALYSIS	79
FIGURE 24	PATENT ANALYSIS FOR PCR SYSTEMS (JANUARY 2014-APRIL 2024)	79
5.4.1	LIST OF MAJOR PATENTS, 2022-2023	80
TABLE 6	LIST OF MAJOR PATENTS IN CLINICAL MICROBIOLOGY MARKET, JANUARY 2022-DECEMBER 2023	80
5.5	VALUE CHAIN ANALYSIS	80
FIGURE 25	CLINICAL MICROBIOLOGY MARKET: VALUE CHAIN ANALYSIS	81
5.6	SUPPLY CHAIN ANALYSIS	82
FIGURE 26	CLINICAL MICROBIOLOGY MARKET: SUPPLY CHAIN ANALYSIS	83
5.7	TRADE ANALYSIS	83
5.7.1	TRADE ANALYSIS FOR MICROSCOPES	83
FIGURE 27	IMPORT DATA FOR MICROSCOPES, BY COUNTRY, 2019-2023 (USD THOUSAND)	83
FIGURE 28	EXPORT DATA FOR MICROSCOPES, BY COUNTRY, 2019-2023 (USD THOUSAND)	84
5.7.2	TRADE ANALYSIS FOR INSTRUMENTS AND APPARATUS FOR PHYSICAL OR CHEMICAL ANALYSIS	84
FIGURE 29	IMPORT DATA FOR INSTRUMENTS AND APPARATUS FOR PHYSICAL OR CHEMICAL ANALYSIS, BY COUNTRY, 2019-2023 (USD THOUSAND)	84
FIGURE 30	EXPORT DATA FOR INSTRUMENTS AND APPARATUS FOR PHYSICAL OR CHEMICAL ANALYSIS, BY COUNTRY, 2019-2023 (USD THOUSAND)	85
5.7.3	TRADE ANALYSIS FOR MEDICAL, SURGICAL, OR LABORATORY STERILIZERS	85
FIGURE 31	IMPORT DATA FOR MEDICAL, SURGICAL, OR LABORATORY STERILIZERS, BY COUNTRY, 2019-2023 (USD THOUSAND)	85
FIGURE 32	EXPORT DATA FOR MEDICAL, SURGICAL, OR LABORATORY STERILIZERS, BY COUNTRY, 2019-2023 (USD THOUSAND)	86
5.8	ECOSYSTEM ANALYSIS	86
FIGURE 33	CLINICAL MICROBIOLOGY MARKET: ECOSYSTEM MAP	87
5.8.1	ROLE IN ECOSYSTEM	87
TABLE 7	CLINICAL MICROBIOLOGY MARKET: ROLE IN ECOSYSTEM	87
5.9	PORTER'S FIVE FORCES ANALYSIS	88
FIGURE 34	CLINICAL MICROBIOLOGY MARKET: PORTER'S FIVE FORCES	88
5.9.1	THREAT OF NEW ENTRANTS	89
5.9.2	THREAT OF SUBSTITUTES	89
5.9.3	BARGAINING POWER OF BUYERS	89
5.9.4	BARGAINING POWER OF SUPPLIERS	89
5.9.5	INTENSITY OF COMPETITIVE RIVALRY	89
5.10	KEY STAKEHOLDERS AND BUYING CRITERIA	90
5.10.1	KEY STAKEHOLDERS IN BUYING PROCESS	90
FIGURE 35	INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS	90
TABLE 9	INFLUENCE OF KEY STAKEHOLDERS ON BUYING PROCESS (%)	90
5.10.2	KEY BUYING CRITERIA	91
FIGURE 36	KEY BUYING CRITERIA FOR CLINICAL MICROBIOLOGY PRODUCTS	91
TABLE 10	KEY BUYING CRITERIA FOR CLINICAL MICROBIOLOGY PRODUCTS	91
5.11	REGULATORY LANDSCAPE	91

5.11.1	REGULATORY ANALYSIS	92
5.11.1.1	North America	92
5.11.1.1.1	US	92
5.11.1.2	Europe	92
5.11.1.3	Asia Pacific	93
5.11.1.4	Rest of the World	93
5.11.2	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	94
5.11.2.1	North America: Regulatory bodies, government agencies, and other organizations	94
5.11.2.2	Europe: Regulatory bodies, government agencies, and other organizations	94
TABLE 12	EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	94
5.11.2.3	Asia Pacific: Regulatory bodies, government agencies, and other organizations	95
TABLE 13	ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	95
5.11.2.4	Latin America: Regulatory bodies, government agencies, and other organizations	95
5.11.2.5	Rest of the World: Regulatory bodies, government agencies, and other organizations	96
5.12	TECHNOLOGY ANALYSIS	96
5.12.1	KEY TECHNOLOGIES	96
5.12.1.1	MALDI-TOF mass spectrometry	96
5.12.2	COMPLEMENTARY TECHNOLOGIES	96
5.12.2.1	Optical immunosensors	97
5.12.2.2	Electrochemical immunosensors	97
5.12.3	ADJACENT TECHNOLOGIES	97
5.12.3.1	Automated multiplex PCR systems	97
5.13	KEY CONFERENCES & EVENTS, 2024-2025	97
TABLE 16	CLINICAL MICROBIOLOGY MARKET: DETAILED LIST OF KEY CONFERENCES & EVENTS, JANUARY 2024-DECEMBER 2025	97
5.14	TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES	98
FIGURE 37	REVENUE SHIFT IN CLINICAL MICROBIOLOGY MARKET	99
5.15	INVESTMENT AND FUNDING SCENARIO	99
5.15.1	NUMBER OF DEALS	100
FIGURE 38	CLINICAL MICROBIOLOGY MARKET: NUMBER OF DEALS BY KEY PLAYERS, 2018-2022	100
5.15.2	VALUE OF INVESTOR DEALS	100
FIGURE 39	CLINICAL MICROBIOLOGY MARKET: VALUE OF INVESTOR DEALS, 2018-2022 (USD MILLION)	100
5.16	UNMET NEEDS	101
6	CLINICAL MICROBIOLOGY MARKET, BY APPLICATION	102
6.1	INTRODUCTION	103
TABLE 17	CLINICAL MICROBIOLOGY MARKET, BY APPLICATION, 2022-2029 (USD MILLION)	103
6.2	PHARMACEUTICAL APPLICATIONS	103
6.2.1	PRESENCE OF WELL-ESTABLISHED PLAYERS AND INCREASED DRUG DEVELOPMENT PIPELINE TO AID MARKET GROWTH	103
TABLE 18	CLINICAL MICROBIOLOGY MARKET FOR PHARMACEUTICAL APPLICATIONS, BY REGION, 2022-2029 (USD MILLION)	104
6.3	CLINICAL APPLICATIONS	104
6.3.1	RISING PREVALENCE OF INFECTIOUS DISEASES AND INCREASING FOCUS ON EARLY DIAGNOSIS TO DRIVE MARKET	104
TABLE 19	CLINICAL MICROBIOLOGY MARKET FOR CLINICAL APPLICATIONS, BY REGION, 2022-2029 (USD MILLION)	105
6.4	FOOD TESTING APPLICATIONS	106
6.4.1	HIGH DEMAND FOR PACKAGED FOOD AND EXPANSION OF DAIRY INDUSTRY TO SUPPORT MARKET GROWTH	106
TABLE 20	CLINICAL MICROBIOLOGY MARKET FOR FOOD TESTING APPLICATIONS, BY REGION, 2022-2029 (USD MILLION)	107
6.5	ENERGY APPLICATIONS	107
6.5.1	INCREASING FOCUS ON ENERGY-EFFICIENT BIOFUEL DEVELOPMENT TO BOOST MARKET GROWTH	107
TABLE 21	CLINICAL MICROBIOLOGY MARKET FOR ENERGY APPLICATIONS, BY REGION, 2022-2029 (USD MILLION)	108

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.6	CHEMICAL & MATERIAL MANUFACTURING APPLICATIONS	108
6.6.1	INCREASED USE OF MICROBE-DERIVED DYES TO FUEL MARKET GROWTH	108
TABLE 22 CLINICAL MICROBIOLOGY MARKET FOR CHEMICAL & MATERIAL MANUFACTURING APPLICATIONS, BY REGION, 2022-2029 (USD MILLION)		
6.7	ENVIRONMENTAL APPLICATIONS	109
6.7.1	RISING PREVALENCE OF AIR- AND WATER-BORNE DISEASES TO PROPEL MARKET GROWTH	109
TABLE 23 CLINICAL MICROBIOLOGY MARKET FOR ENVIRONMENTAL APPLICATIONS, BY REGION, 2022-2029 (USD MILLION)		
7	CLINICAL MICROBIOLOGY MARKET, BY DISEASE AREA	111
7.1	INTRODUCTION	112
TABLE 24 CLINICAL MICROBIOLOGY MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)		
7.2	RESPIRATORY DISEASES	112
7.2.1	INCREASING CLINICAL RESEARCH ACTIVITIES FOR ADVANCED DRUG DEVELOPMENT TO DRIVE MARKET	112
TABLE 25 CLINICAL MICROBIOLOGY MARKET FOR RESPIRATORY DISEASES, BY REGION, 2022-2029 (USD MILLION)		
7.3	BLOODSTREAM INFECTIONS	114
7.3.1	GROWING INCIDENCE OF HOSPITAL-ACQUIRED INFECTIONS TO PROPEL MARKET GROWTH	114
TABLE 26 CLINICAL MICROBIOLOGY MARKET FOR BLOODSTREAM INFECTIONS, BY REGION, 2022-2029 (USD MILLION)		
7.4	GASTROINTESTINAL DISEASES	115
7.4.1	HIGH RISK OF FOOD- AND WATER-BORNE INFECTIONS TO AID MARKET GROWTH	115
TABLE 27 CLINICAL MICROBIOLOGY MARKET FOR GASTROINTESTINAL DISEASES, BY REGION, 2022-2029 (USD MILLION)		
7.5	SEXUALLY TRANSMITTED DISEASES	116
7.5.1	INCREASING EMPHASIS ON EARLY AND EFFECTIVE DISEASE DIAGNOSIS TO BOOST MARKET GROWTH	116
TABLE 28 CLINICAL MICROBIOLOGY MARKET FOR SEXUALLY TRANSMITTED DISEASES, BY REGION, 2022-2029 (USD MILLION)		
7.6	URINARY TRACT INFECTIONS	117
7.6.1	RISING NUMBER OF CLINICAL TRIALS FOR DEVELOPMENT OF NEW ANTIBIOTICS TO SUPPORT MARKET GROWTH	117
TABLE 29 CLINICAL MICROBIOLOGY MARKET FOR URINARY TRACT INFECTIONS, BY REGION, 2022-2029 (USD MILLION)		
7.7	PERIODONTAL DISEASES	119
7.7.1	INCREASING R&D INITIATIVES TO STUDY MICROBE-INDUCED DISEASES TO FUEL MARKET GROWTH	119
TABLE 30 CLINICAL MICROBIOLOGY MARKET FOR PERIODONTAL DISEASES, BY REGION, 2022-2029 (USD MILLION)		
7.8	OTHER DISEASES	120
TABLE 31 CLINICAL MICROBIOLOGY MARKET FOR OTHER DISEASES, BY REGION, 2022-2029 (USD MILLION)		
8	CLINICAL MICROBIOLOGY MARKET, BY PRODUCT	121
8.1	INTRODUCTION	122
TABLE 32 CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)		
8.2	INSTRUMENTS	122
TABLE 33 CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)		
TABLE 34 CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY DISEASE AREA, 2022-2029 (USD MILLION)		
TABLE 35 CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY END USER, 2022-2029 (USD MILLION)		
TABLE 36 CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY REGION, 2022-2029 (USD MILLION)		
8.2.1	LABORATORY INSTRUMENTS	124
TABLE 37 LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)		
TABLE 38 LABORATORY INSTRUMENTS MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)		
TABLE 39 LABORATORY INSTRUMENTS MARKET, BY END USER, 2022-2029 (USD MILLION)		
TABLE 40 LABORATORY INSTRUMENTS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.1	Incubators	127
8.2.1.1.1	Rising demand for cell culture applications to drive segment	127
TABLE 41 INCUBATORS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.2	Gram stainers	128

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

8.2.1.2.1	Faster and more accurate screening of bacterial pathogens to propel segment growth	128
TABLE 42 GRAM STAINERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.3	Bacterial colony counters	128
8.2.1.3.1	Increased focus on accurate bacterial quantification to fuel segment growth	128
TABLE 43 BACTERIAL COLONY COUNTERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.4	Autoclave sterilizers	129
8.2.1.4.1	Growing need for infection control in healthcare facilities to support market growth	129
TABLE 44 AUTOCLAVE STERILIZERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.5	Microbial air samplers	130
8.2.1.5.1	Need for enhanced air quality monitoring in cleanrooms to accelerate segment growth	130
TABLE 45 MICROBIAL AIR SAMPLERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.6	Anaerobic culture systems	130
8.2.1.6.1	Increased research on anaerobic microorganisms to boost segment growth	130
TABLE 46 ANAEROBIC CULTURE SYSTEMS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.7	Petri dish fillers	131
8.2.1.7.1	Need for minimal bench space and effective control with graphical user interfaces to aid segment growth	131
TABLE 47 PETRI DISH FILLERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.8	Blood culture systems	132
8.2.1.8.1	Technological advancements in diagnostic testing to drive segment	132
TABLE 48 BLOOD CULTURE SYSTEMS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.9	Microbial culture systems	132
8.2.1.9.1	Increase in biopharmaceutical research to augment segment growth	132
TABLE 49 MICROBIAL CULTURE SYSTEMS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.1.10	Other laboratory instruments	133
TABLE 50 OTHER LABORATORY INSTRUMENTS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.2	MICROBIOLOGY ANALYZERS	134
TABLE 51 LIST OF COMMERCIALY AVAILABLE MICROBIOLOGY ANALYZERS, 2023-2024		
TABLE 52 MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)		
TABLE 53 MICROBIOLOGY ANALYZERS MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)		
TABLE 54 MICROBIOLOGY ANALYZERS MARKET, BY END USER, 2022-2029 (USD MILLION)		
TABLE 55 MICROBIOLOGY ANALYZERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.2.1	Molecular diagnostic instruments	136
8.2.2.1.1	Advancements in multiplexing techniques and high adoption of genomics-based analysis to aid market growth	136
TABLE 56 MOLECULAR DIAGNOSTIC INSTRUMENTS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.2.2	Microscopes	137
8.2.2.2.1	Rising demand for high-resolution imaging to propel market growth	137
TABLE 57 MICROSCOPES MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.2.2.3	Mass spectrometers	138
8.2.2.3.1	Increased applications in proteomics and metabolomics to boost market growth	138
TABLE 58 MASS SPECTROMETERS MARKET, BY REGION, 2022-2029 (USD MILLION)		
8.3	REAGENTS	139
TABLE 59 CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)		
TABLE 60 CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY DISEASE AREA, 2022-2029 (USD MILLION)		
TABLE 61 CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY END USER, 2022-2029 (USD MILLION)		
TABLE 62 CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY REGION, 2022-2029 (USD MILLION)		
8.3.1	PATHOGEN-SPECIFIC KITS	141
8.3.1.1	Growing private-public initiatives for research to support market growth	141

TABLE 63	PATHOGEN-SPECIFIC KITS MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)	142
TABLE 64	PATHOGEN-SPECIFIC KITS MARKET, BY END USER, 2022-2029 (USD MILLION)	142
TABLE 65	PATHOGEN-SPECIFIC KITS MARKET, BY REGION, 2022-2029 (USD MILLION)	143
8.3.2	GENERAL REAGENTS	143
8.3.2.1	Rising demand for diagnostic tests for pathogen detection to propel segment growth	143
TABLE 66	GENERAL REAGENTS MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)	144
TABLE 67	GENERAL REAGENTS MARKET, BY END USER, 2022-2029 (USD MILLION)	144
TABLE 68	GENERAL REAGENTS MARKET, BY REGION, 2022-2029 (USD MILLION)	145
8.4	MEDIA & SERA	145
8.4.1	RIISING DEMAND FOR STANDARDIZED CULTURE MEDIA FOR MICROBIOLOGICAL TESTING TO DRIVE MARKET	145
TABLE 69	CLINICAL MICROBIOLOGY MARKET FOR MEDIA & SERA, BY DISEASE AREA, 2022-2029 (USD MILLION)	146
TABLE 70	CLINICAL MICROBIOLOGY MARKET FOR MEDIA & SERA, BY END USER, 2022-2029 (USD MILLION)	146
TABLE 71	CLINICAL MICROBIOLOGY MARKET FOR MEDIA & SERA, BY REGION, 2022-2029 (USD MILLION)	147
9	CLINICAL MICROBIOLOGY MARKET, BY END USER	148
9.1	INTRODUCTION	149
TABLE 72	NUMBER OF CLINICAL LABORATORIES, BY TIER, 2023	149
TABLE 73	CLINICAL MICROBIOLOGY MARKET, BY END USER, 2022-2029 (USD MILLION)	149
9.2	HOSPITALS & DIAGNOSTIC CENTERS	150
9.2.1	GROWING INCIDENCE OF TARGET DISEASES TO DRIVE MARKET	150
TABLE 74	CLINICAL MICROBIOLOGY MARKET FOR HOSPITALS & DIAGNOSTIC CENTERS, BY REGION, 2022-2029 (USD MILLION)	150
9.3	CONTRACT TESTING LABORATORIES	151
9.3.1	CONTINUOUS OUTSOURCING OF DRUG TESTING PROCEDURES TO LABORATORY SERVICE PROVIDERS TO AID MARKET GROWTH	151
TABLE 75	CLINICAL MICROBIOLOGY MARKET FOR CONTRACT TESTING LABORATORIES, BY REGION, 2022-2029 (USD MILLION)	151
9.4	ACADEMIC & RESEARCH INSTITUTES	152
9.4.1	INCREASED USE OF ADVANCED MOLECULAR DIAGNOSTIC PRODUCTS FOR DISEASE DIAGNOSIS TO AUGMENT MARKET GROWTH	152
TABLE 76	CLINICAL MICROBIOLOGY MARKET FOR ACADEMIC & RESEARCH INSTITUTES, BY REGION, 2022-2029 (USD MILLION)	152
10	CLINICAL MICROBIOLOGY MARKET, BY REGION	153
10.1	INTRODUCTION	154
TABLE 77	SALES VOLUME IN US, UK, AND CHINA, BY PRODUCT TYPE (2023)	154
TABLE 78	CLINICAL MICROBIOLOGY MARKET, BY REGION, 2022-2029 (USD MILLION)	154
10.2	NORTH AMERICA	155
FIGURE 40	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET SNAPSHOT	156
TABLE 79	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	157
TABLE 80	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	157
TABLE 81	NORTH AMERICA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	158
TABLE 82	NORTH AMERICA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	158
TABLE 83	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	159
TABLE 84	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)	159
TABLE 85	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET, BY END USER, 2022-2029 (USD MILLION)	160
TABLE 86	NORTH AMERICA: CLINICAL MICROBIOLOGY MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	160
10.2.1	NORTH AMERICA: RECESSION IMPACT	160
10.2.2	US	161
10.2.2.1	US to dominate clinical microbiology market during study period	161
TABLE 87	US: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	161
TABLE 88	US: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	162

TABLE 89	US: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	162
TABLE 90	US: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	163
TABLE 91	US: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	163
10.2.3	CANADA	163
10.2.3.1	Supportive government initiatives and increased research funding to boost market growth	163
TABLE 92	CANADA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	164
TABLE 93	CANADA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	164
TABLE 94	CANADA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	165
TABLE 95	CANADA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	165
TABLE 96	CANADA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	166
10.3	EUROPE	166
TABLE 97	EUROPE: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	167
TABLE 98	EUROPE: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	167
TABLE 99	EUROPE: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	168
TABLE 100	EUROPE: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	168
TABLE 101	EUROPE: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	169
TABLE 102	EUROPE: CLINICAL MICROBIOLOGY MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)	169
TABLE 103	EUROPE: CLINICAL MICROBIOLOGY MARKET, BY END USER, 2022-2029 (USD MILLION)	170
TABLE 104	EUROPE: CLINICAL MICROBIOLOGY MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	170
10.3.1	EUROPE: RECESSION IMPACT	171
10.3.2	GERMANY	171
10.3.2.1	Growing outsourcing of diagnostic testing by hospitals to fuel market growth	171
TABLE 105	GERMANY: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	172
TABLE 106	GERMANY: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	172
TABLE 107	GERMANY: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	173
TABLE 108	GERMANY: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	173
TABLE 109	GERMANY: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	174
10.3.3	UK	174
10.3.3.1	Rising acceptance of genome-based diagnostic techniques to fuel market growth	174
TABLE 110	UK: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	175
TABLE 111	UK: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	175
TABLE 112	UK: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	176
TABLE 113	UK: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	176
TABLE 114	UK: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	177
10.3.4	FRANCE	177
10.3.4.1	Favorable healthcare reforms and investments in diagnostic infrastructure to propel market growth	177
TABLE 115	FRANCE: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	178
TABLE 116	FRANCE: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	178
TABLE 117	FRANCE: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	179
TABLE 118	FRANCE: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	179
TABLE 119	FRANCE: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	180
10.3.5	ITALY	180
10.3.5.1	Improved healthcare services and better disease surveillance to fuel market growth	180
TABLE 120	ITALY: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	181
TABLE 121	ITALY: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	181
TABLE 122	ITALY: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	182
TABLE 123	ITALY: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	182

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 124	ITALY: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	183
10.3.6	SPAIN	183
10.3.6.1	Well-established research centers and stringent food regulations to augment market growth	183
TABLE 125	SPAIN: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	184
TABLE 126	SPAIN: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	184
TABLE 127	SPAIN: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	185
TABLE 128	SPAIN: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	185
TABLE 129	SPAIN: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	186
10.3.7	REST OF EUROPE	186
TABLE 130	REST OF EUROPE: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029(USD MILLION)	186
TABLE 131	REST OF EUROPE: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	187
TABLE 132	REST OF EUROPE: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	187
TABLE 133	REST OF EUROPE: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	188
TABLE 134	REST OF EUROPE: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	188
10.4	ASIA PACIFIC	188
FIGURE 41	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET SNAPSHOT	189
TABLE 135	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029(USD MILLION)	190
TABLE 136	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	190
TABLE 137	ASIA PACIFIC: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	191
TABLE 138	ASIA PACIFIC: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	191
TABLE 139	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	192
TABLE 140	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)	192
TABLE 141	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET, BY END USER, 2022-2029 (USD MILLION)	193
TABLE 142	ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	193
10.4.1	ASIA PACIFIC: RECESSION IMPACT	194
10.4.2	JAPAN	194
10.4.2.1	Technological advancements in healthcare and high geriatric population to aid market growth	194
TABLE 143	JAPAN: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	194
TABLE 144	JAPAN: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	195
TABLE 145	JAPAN: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	195
TABLE 146	JAPAN: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	196
TABLE 147	JAPAN: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	196
10.4.3	CHINA	196
10.4.3.1	Increasing government focus on disease prevention to drive market	196
TABLE 148	CHINA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	197
TABLE 149	CHINA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	198
TABLE 150	CHINA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	198
TABLE 151	CHINA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	199
TABLE 152	CHINA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	199
10.4.4	INDIA	199
10.4.4.1	Rapidly increasing population and high incidence of infectious diseases to propel market growth	199
TABLE 153	INDIA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	200
TABLE 154	INDIA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	201
TABLE 155	INDIA LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	201
TABLE 156	INDIA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	202
TABLE 157	INDIA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	202
10.4.5	AUSTRALIA	202

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

10.4.5.1	Rising public-private investments and growing research on diagnostic applications to drive market	202
TABLE 158	AUSTRALIA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	203
TABLE 159	AUSTRALIA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	203
TABLE 160	AUSTRALIA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	204
TABLE 161	AUSTRALIA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	204
TABLE 162	AUSTRALIA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	205
10.4.6	SOUTH KOREA	205
10.4.6.1	Strong government support and increased adoption of advanced diagnostic technologies to aid market growth	205
TABLE 163	SOUTH KOREA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	205
TABLE 164	SOUTH KOREA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	206
TABLE 165	SOUTH KOREA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	206
TABLE 166	SOUTH KOREA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	207
TABLE 167	SOUTH KOREA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	207
10.4.7	REST OF ASIA PACIFIC	207
TABLE 168	REST OF ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	208
TABLE 169	REST OF ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	208
TABLE 170	REST OF ASIA PACIFIC: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	209
TABLE 171	REST OF ASIA PACIFIC: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	209
TABLE 172	REST OF ASIA PACIFIC: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	210
10.5	LATIN AMERICA	210
TABLE 173	LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	211
TABLE 174	LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	211
TABLE 175	LATIN AMERICA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	212
TABLE 176	LATIN AMERICA: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	212
TABLE 177	LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	213
TABLE 178	LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET, BY DISEASE AREA, 2022-2029 (USD MILLION)	213
TABLE 179	LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET, BY END USER, 2022-2029 (USD MILLION)	214
TABLE 180	LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET, BY COUNTRY, 2022-2029 (USD MILLION)	214
10.5.1	LATIN AMERICA: RECESSION IMPACT	214
10.5.2	BRAZIL	215
10.5.2.1	High healthcare expenditure and presence of key manufacturers to support market growth	215
TABLE 181	BRAZIL: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	215
TABLE 182	BRAZIL: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	216
TABLE 183	BRAZIL: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	216
TABLE 184	BRAZIL: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	217
TABLE 185	BRAZIL: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	217
10.5.3	MEXICO	217
10.5.3.1	Supportive government initiatives and increased healthcare investments to augment market growth	217
TABLE 186	MEXICO: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	218
TABLE 187	MEXICO: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	218
TABLE 188	MEXICO: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	219
TABLE 189	MEXICO: MICROBIOLOGY ANALYZERS MARKET, BY TYPE, 2022-2029 (USD MILLION)	219
TABLE 190	MEXICO: CLINICAL MICROBIOLOGY MARKET FOR REAGENTS, BY TYPE, 2022-2029 (USD MILLION)	220
10.5.4	REST OF LATIN AMERICA	220
TABLE 191	REST OF LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET, BY PRODUCT, 2022-2029 (USD MILLION)	221
TABLE 192	REST OF LATIN AMERICA: CLINICAL MICROBIOLOGY MARKET FOR INSTRUMENTS, BY TYPE, 2022-2029 (USD MILLION)	221
TABLE 193	REST OF LATIN AMERICA: LABORATORY INSTRUMENTS MARKET, BY TYPE, 2022-2029 (USD MILLION)	222

Clinical Microbiology Market Size, Share & Trends by Application (Pharma, Food, Clinical, Manufacturing, Environment), Disease (Respiratory Disease, Blood Stream, GIT, UTI), Product (Instrument, Analyzer, Reagent), End User, and Region - Global Forecast to 2029

Market Report | 2024-05-29 | 339 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Zip Code*

Country*

Date

Signature