



REPORT OVERVIEW



The 2017 SDi Global Assessment Report

The Laboratory Analytical & Life Science
Instrumentation Industry

JANUARY 2017

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■ STUDY SCOPE

This report will help you to::

- Understand the overall size, growth and segmentation of the analytical and life science instrumentation industry.
- Determine the relative market share of leading vendors in 82 different product categories.
- Project the growth of the market and each segment from 2015-2020.
- Identify the contribution of consumables and services to the size of the market.
- Review technological and market developments impacting the growth of the market.

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■ REPORT HIGHLIGHTS

The 2017 SDi Global Assessment Report: The Laboratory Analytical & Life Science Instrumentation Industry is the gold standard for measuring the size and growth of the analytical and life science instrumentation industry.

Overall, the \$50+ billion analytical and life science instrument and laboratory products industry gathered strength in 2016, achieving greater revenues than in 2015. Government and academic funding remained somewhat troubled in 2016, but taken as a whole, new initiatives helped provide growth from this sector. Demand from private organizations was mixed. Pharmaceutical and biotechnology customers continued to increase demand for both life science and materials science tools throughout their workflows from research to production. Low commodities prices had a negative impact on demand in the oil and gas, and metals and mining industries, but semiconductors, electronics and non-traditional energy industry were brighter spots in the industrial markets. The applied markets also gained momentum in 2016. In total, the overall analytical and life science instrument and lab products market, including aftermarket and service, increased 4% in 2016, compared with 2015.

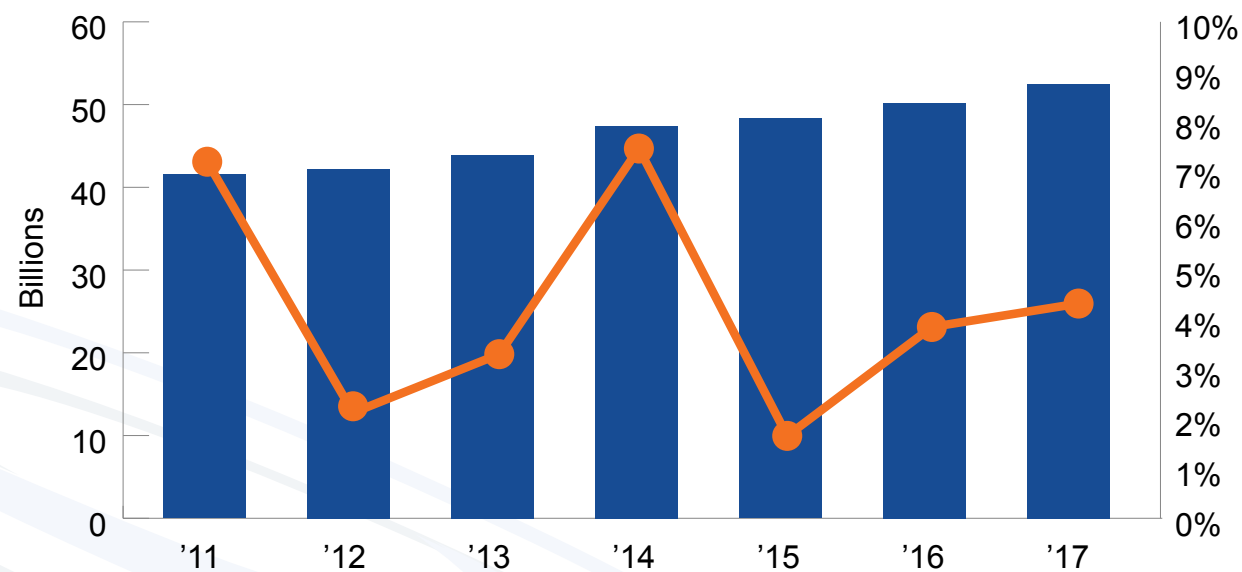
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REPORT HIGHLIGHTS (continued)

INSTRUMENT INDUSTRY REVENUES AND GROWTH



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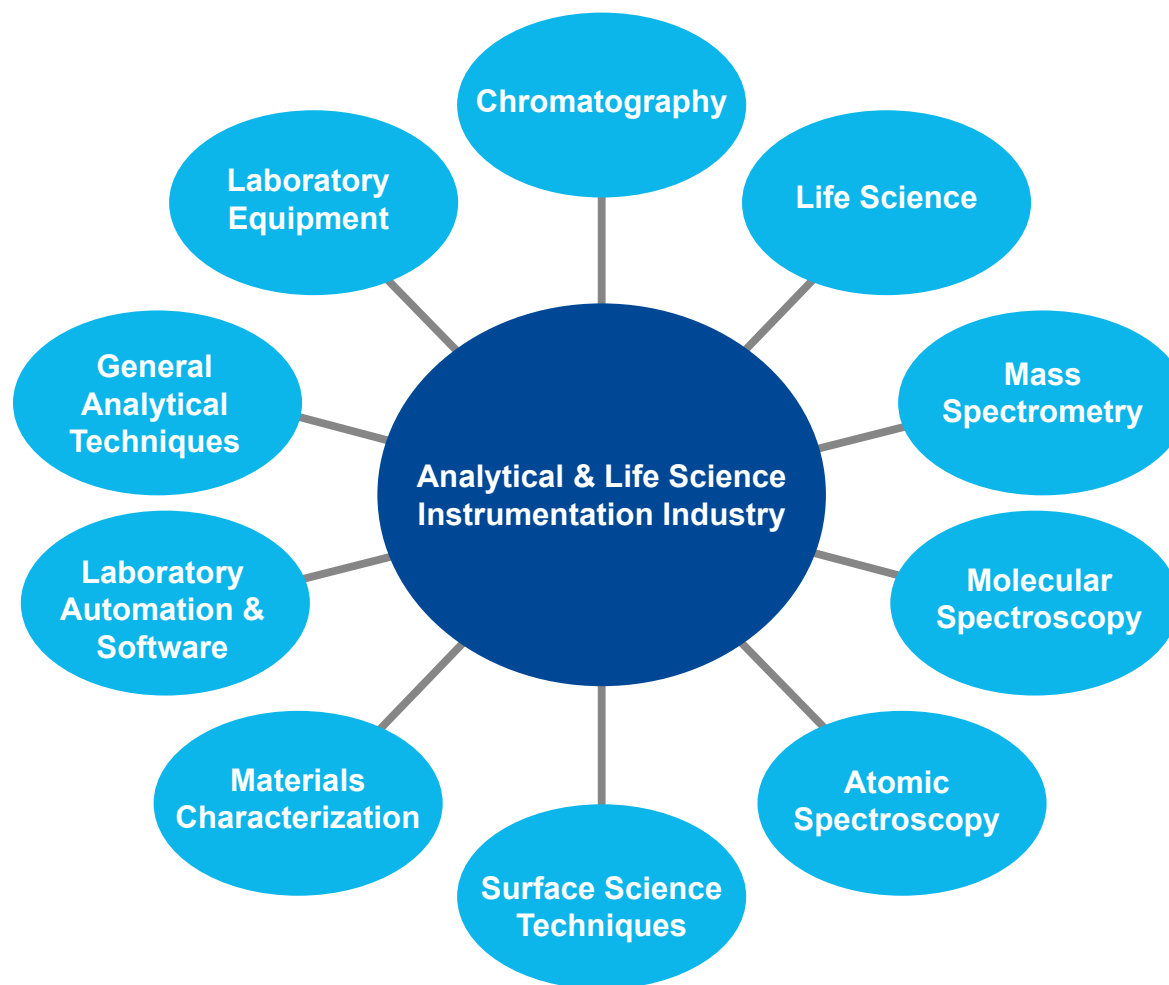
is the definitive market reference tool for the analytical instrument industry. This report covers 82 individual instrumentation and related technologies. Each technology is segmented according to several primary classifications typically related to underlying techniques. The 10 sections include chromatography, life science instrumentation, mass spectrometry, molecular spectroscopy, atomic spectroscopy, surface science, materials characterization, lab automation, general analytical techniques, and lab equipment. For each instrument and category, the report quantifies the regional distribution of demand; the size of the market segmented according to initial systems, aftermarket, and service; unit shipments/installations; growth rates; and demand by industry and lab function. Each section also explores the current state of the competitive playing field, including a list of the top vendors' market shares, a vendor participation matrix, recent developments, and concludes with a short discussion that suggests where the market might be headed over the next five years from the related standpoints of technology, competition, and growth.

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REPORT HIGHLIGHTS (continued)



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■ REPORT OVERVIEW

The main body of this report is organized into 16 separate sections. After the introduction is a section that provides the reader with a general technical overview of the technologies and a guide to the segmentations used within the report. The third section examines the instrument industry from a competitive standpoint. Top suppliers are ranked by sales and evaluated in terms of technology involvement and strategic focus. Acquisitions, divestitures, and alliances are also discussed. It also provides the reader with measures and indicators of growth and profit performance for the industry. Two SDi proprietary indices are presented: the Laboratory Instrument Sales Index and the Laboratory Equipment Sales Index. The next section summarizes historical and projected market revenues for the entire industry by basic technology. This is immediately followed by treatment of the industry from a regional perspective in which both traditional and emerging markets are analyzed and quantified.

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Each major section
(e.g., “Chromatography”)
includes:

- Summary Overview
- Demand by Product
- Demand by Region
- Application Segmentation
- Competitive Situation

Each product chapter
(e.g., Analytical HPLC)
consists of the following
sections:

- Technology Overview
- Product Segmentation
- Unit Shipments
- Application Segmentation
- Regional Demand
- Competitive Situation
- Recent Developments
- Future Prospects

■ REPORT OVERVIEW (continued)

SECTION 1: INTRODUCTION

- Structure and Audience
- Definition of the Market
- Sources Of Information
- Report Organization

SECTION II. SEGMENTS AND TECHNOLOGIES

- Analytical and Life Science Instrumentation
- Laboratory Applications Define Instrument Use
- End Markets
- Laboratory Function
- The Functional Migration Of Instrumentation
- Geographic Segments
 - USA & Canada
 - Europe
 - China
 - Japan
 - India
 - Other Asia Pacific
 - Latin America
 - Rest-Of-World

- Lab Count by Region
- Analytical Instrument Technologies
- Chromatography Techniques
- Mass Spectrometry

SECTION III. INDUSTRY PARTICIPANTS

- Industry Structure
- Industry Leaders
- The Top Ten Instrumentation Vendors
- The Top 50
- Geography
- Participation by Product Technology
- Industry Index: Growth And Profitability Indicators
- Life Science Sales Index
- Analytical Instrument Sales Index
- Business Combinations
- Acquisitions and Divestitures
- Business Partnerships And Alliances

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■ REPORT OVERVIEW (continued)

SECTION IV. WORLDWIDE MARKET DEMAND

- Retrospective: Worldwide Instrument Demand (2010-2015)
- Forecast: Worldwide Instrument Demand (2015-2020)
- Demand By Industry
- Demand by Region
- Retrospective: 2010-2015
- Forecast: 2015-2020
- Currency Exchange

SECTION VI. CHROMATOGRAPHY

- Technologies Overview
- Analytical HPLC
- Gas Chromatography
- Preparative HPLC
- Ion Chromatography
- Low Pressure Liquid Chromatography
- Clinical HPLC
- Flash Chromatography
- Supercritical Fluid Chromatography
- Thin-Layer Chromatography (TLC)

SECTION VII. MASS SPECTROMETRY

- Technologies Overview
- Quadrupole LC/MS
- GC/MS
- FT/MS And Ion Trap LC/MS
- Time Of Flight LC/MS
- MALDI-TOF
- Magnetic Sector Mass Spectrometry
- Portable And In-Field Mass Spectrometry

SECTION VIII. ATOMIC SPECTROSCOPY

- Technologies Overview
- X-Ray Fluorescence Spectroscopy (XRF)
- X-Ray Diffraction (XRD)
- Atomic Absorption Spectroscopy (AA)
- Inductively Coupled Plasma (ICP) & Glow Discharge Spectroscopy
- Inductively Coupled Plasma MS (ICP-MS)
- Arc/Spark Optical Emission Spectroscopy
- Inorganic Elemental Analysis
- Total Organic Carbon (TOC) & Other Sum Parameters
- Organic Elemental Analysis

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SECTION IX. MOLECULAR SPECTROSCOPY

- Technologies Overview
- UV/Vis Spectroscopy
- Infrared Spectroscopy
- Near-Infrared Spectroscopy
- Raman Spectroscopy
- Color Measurement
- Fluorescence & Luminescence
- Nuclear Magnetic Resonance (NMR) Spectroscopy
- Polarimetry & Refractometry
- Ellipsometry

SECTION X. MATERIALS CHARACTERIZATION

- Technologies Overview
- Physical Testing
- Thermal Analysis
- Particle Characterization
- Rheometry And Viscometry
- Calorimetry
- Petroleum Analyzers

SECTION XI. SURFACE SCIENCE

- Technologies Overview
- Optical Microscopy
- Confocal & Advanced Microscopy
- Electron Microscopy
- Surface Analyzers
- Scanning Probe Microscopy (SPM)

SECTION XII. LIFE SCIENCE INSTRUMENTATION

- Technologies Overview
- DNA Sequencing
- PCR
- Microarrays
- Nucleic Acid Sample Prep And Cell Separation
- Electrophoresis
- Capillary Electrophoresis
- In Vivo Animal Imaging
- Flow Cytometry
- Cell Counters
- Electrophysiology
- High Content Analysis/Cell Imaging
- SPR and Label-Free Detection
- Automated Synthesizers

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SECTION XIII. LAB AUTOMATION & SOFTWARE

- Technologies Overview
- Liquid Handling
- Microplate Readers
- Multiplex/High-Throughput Elisa
- Robotics
- Management Informatics (LIMS, ELN/LES, And SDMS)
- Informatics

SECTION XIV. GENERAL ANALYTICAL TECHNIQUES

- Technologies Overview
- Electrochemistry
- Laboratory Balances
- Radioactivity
- CFA And Discrete Analyzers
- Dissolution Testing

SECTION XV. LABORATORY EQUIPMENT

- Technologies Overview
- Laboratory Centrifuges
- Transfection
- Water Purification
- Extraction Techniques
- Laboratory Gas Generators
- Laboratory Concentrators And Evaporators
- Laboratory Fume Hoods
- Laboratory Incubators
- Biological Safety Cabinets
- Bioreactors/Fermenters
- Microwave Assisted Chemistry
- Lab Washers
- Laboratory Shakers, Rotators And Stirrers

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METHODOLOGY

BioInformatics' SDi division maintains a database spanning decades of the corporate financial performance of life science and analytical instrument companies that is updated continuously. Proprietary algorithms, adjusted by market knowledge and client feedback, allocate revenues across dozens of product categories to create reliable models of market size, share, segmentation and growth. SDi analysts also employ primary research that involves substantial interactions with knowledgeable sources, including end-users, individuals within regulatory agencies, marketing and technical personnel of participating vendors, and other informed observers. The bulk of the information contained in this edition was gathered specifically in preparation of **The 2017 Global Assessment Report**, with an emphasis on primary sources. Secondary research was also conducted to provide background perspective, to derive and substantiate market estimates, and to supplement those insights gleaned from primary research activities.

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With your purchase of this report, we also invite you to set up a meeting with our report team of scientific and market analysts. We can answer any questions you may have about our findings, and we can also share what we believe to be the significant trends affecting your market.



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■ ABOUT BIOINFORMATICS LLC & SDI

Strategic Directions International (SDi), a leading international management-consulting firm in the highly specialized field of analytical instruments, was acquired by BioInformatics LLC in 2014. The two firms combined to form the premier research and advisory firm serving the life science and analytical instrument industry. By leveraging our online professional network of tens of thousands of scientists, we have supported more than 500 companies and provided insights that lead to better business decisions. Our expertise includes assessing the size and attractiveness of markets, optimizing product configurations and pricing, validating corporate acquisitions, measuring customers' brand loyalty, and evaluating brand strength and positioning.

For more than two decades, BioInformatics LLC and SDi have been providing off-the-shelf reports, custom-designed studies and market analysis that enable companies to understand their market and competitors through the eyes of the most important information source of all—the people who buy their products.

For more information about BioInformatics and SDi product and service offerings, please visit our website at www.gene2drug.com, call **703.778.3080 x19**, or email reports@gene2drug.com

