



## REPORT OVERVIEW



# SDi Global Assessment Report 2018

The Laboratory Analytical & Life Science  
Instrumentation Industry

FEBRUARY 2018



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# The 2018 SDi Global Assessment Report

## The Laboratory Analytical & Life Science Instrumentation Industry

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# The 2018 SDi Global Assessment Report

## The Laboratory Analytical & Life Science Instrumentation Industry

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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 2017-2022.
- 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 OVERVIEW

### **The 2018 SDi Global Assessment Report: The Laboratory Analytical & Life Science Instrumentation Industry**

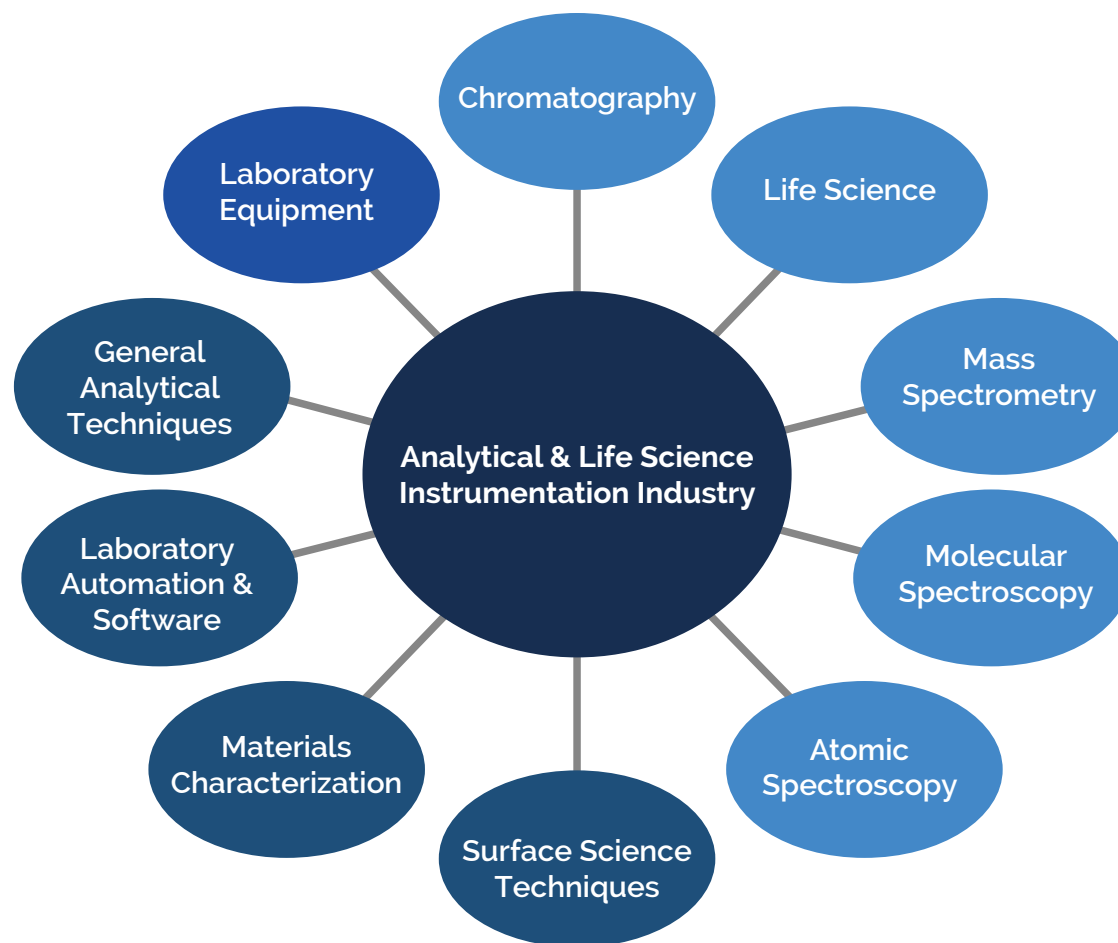
is the definitive market reference tool for the analytical instrument industry. This report includes market sizing for 2017, forecasts through 2022, growth rates for 82 instrument techniques, and features detailed market analysis on over 50 instruments in 6 technology categories. Each of these detailed sections includes data and discussion of market segmentation by product, industry, function, and region. Data on pricing and units (new and used) sold are included. In addition to vendor share data for 2017, a chart of vendor participation versus product area for all of the significant suppliers is included. A brief description of related business developments and/or significant product introductions is also included in each detailed instrument technique section. Each also provides a summary of the key market dynamics affecting demand and growth potential for the technology under discussion.

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### REPORT OVERVIEW (continued)



■ Fully Updated in 2018   ■ Partially Updated in 2018   ■ Update Scheduled for 2019

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## REPORT OVERVIEW

The main body of this report is organized into 12 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. Finally the detailed market data sections are presented organized into major technology sections, which include a summary presentation of the included technologies.

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## The Laboratory Analytical & Life Science Instrumentation Industry

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
- Key Market Dynamics
- Unit Shipments
- Application Segmentation
- Regional Demand
- Competitive Situation

### ■ REPORT OVERVIEW (continued)

#### SECTION I: INTRODUCTION

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

#### SECTION II. TECHNOLOGIES

- Overview
- Chromatography
- Mass Spectrometry
- Molecular Spectroscopy
- Life Science Instrumentation
- Lab Automation & Software
- Materials Characterization
- Surface Science
- General Analytical Techniques
- Select Lab Equipment

#### SECTION III. MARKET SEGMENTATIONS

- Product types
- Vendor Shares
- Industrial Segmentation
- Laboratory Function
- Regional Segmentations
- Lab Count by Region

#### SECTION IV. INDUSTRY PARTICIPANTS

- Industry Structure
- Industry Leaders: Top 50
- Participation by Product Technology: Top 50
- Industry Index: Combined Life Science and Analytical Instrument
- Life Science Sales Index
- Analytical Sales Index
- Business Combinations: Acquisitions and Divestitures
- Business Combinations: Business Partnerships and Alliances

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#### **SECTION V. WORLDWIDE MARKET DEMAND**

- Retrospective: Instrument Demand: 2012-2017
- Forecast: Instrument Demand 2017-2022
- Demand by Industry
- Demand by Region

#### **SECTION VI. CHROMATOGRAPHY**

- Technologies Overview
- Analytical HPLC
- Gas Chromatography
- Preparative HPLC
- Ion Chromatography
- Low Pressure Liquid Chromatography
- Clinical HPLC (HbA1c)
- Flash Chromatography
- Supercritical Fluid Chromatography
- Thin-Layer Chromatography (TLC)

#### **SECTION VII. MASS SPECTROMETRY**

- Technologies Overview
- Quadrupole LC/MS
- GC/MS
- FT/MS & Ion Trap LC/MS
- Time-of-Flight LC/MS
- MALDI-TOF
- Magnetic Sector
- Portable & In-Field MS

#### **SECTION VIII. ATOMIC SPECTROSCOPY**

- Technologies Overview
- X-Ray Fluorescence (XRF) Spectroscopy
- X-Ray Diffraction (XRD) Spectroscopy
- Atomic Absorption Spectroscopy (AAS)
- 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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### ■ REPORT OVERVIEW (continued)

#### **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. 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 Systems
- SPR and Label-Free Detection
- Automated Synthesizers

#### **SECTION XI. SELECT LAB EQUIPMENT**

- Transfection
- Bioreactors & Fermenters
- Laboratory Incubators
- Biological Safety Cabinets

#### **SECTION XII. ANALYTICAL TECHNOLOGIES IN BRIEF**

- Lab Automation & Software
- Materials Characterization
- Surface Science
- General Analytical Techniques
- Overall Lab Equipment

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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 2018 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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### ■ PRICING

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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](http://www.gene2drug.com), call **703.778.3080 x19**, or email [reports@gene2drug.com](mailto:reports@gene2drug.com)

