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REPORT OVERVIEW



2019 SDI GLOBAL ASSESSMENT REPORT

THE LABORATORY ANALYTICAL & LIFE SCIENCE INSTRUMENTATION INDUSTRY

19-001 | FEBRUARY 2019

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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. 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.

Objectives of the Global Assessment Report

1. Understand the overall size, growth and segmentation of the analytical and life science instrumentation industries.
2. Determine the relative market share of leading vendors in 81 different product categories
3. Project the growth of the market and each segment from 2018-2023.
4. Identify the contribution of consumables and services to the size of the market revenues.
5. Review technological and market developments impacting the growth of the market.

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■ Methodologies

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 2019 Global Assessment Report — The Laboratory Analytical & Life Science Instrumentation Industry**, 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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Report Contents

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

- Market 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
- Product Segments
- Unit Shipments
- Industry & Function
- Application Segmentation
- Regional Demand
- Competitive Situation
- Recent Developments

INTRODUCTION

- Structure and Audience
- Methodology
- Analytical Technologies
- Scope
- Definition

MARKET OVERVIEW

- Lab Count
- Industry Participants
- Industry Index
- Economic Scenario
- Business News

OVERALL MARKET DEMAND

CHROMATOGRAPHY

- Market Overview
- Analytical HPLC
- Preparative HPLC
- Gas Chromatography
- Ion Chromatography

- Low Pressure Liquid Chromatography
- Clinical HPLC (HbA1c)
- Flash Chromatography
- Supercritical Fluid Chromatography
- Thin-Layer Chromatography (TLC)

MASS SPECTROMETRY

- Market 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

ATOMIC SPECTROSCOPY

- Market Overview
- X-Ray Fluorescence (XRF) Spectroscopy
- X-Ray Diffraction (XRD) Spectroscopy
- Atomic Absorption Spectroscopy (AAS)

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Report Contents

- Inductively-Coupled Plasma (ICP) & Glow Discharge Spectroscopy
- Inductively-Coupled Plasma MS (ICP-MS)
- Arc/Spark Optical Emission Spectroscopy
- Total Organic Carbon (TOC) & Other Sum Parameters
- Elemental Analyzers

MOLECULAR SPECTROSCOPY

- Market Overview
- Nuclear Magnetic Resonance (NMR) Spectroscopy
- UV/Vis Spectroscopy
- Infrared Spectroscopy
- Near-Infrared Spectroscopy
- Raman Spectroscopy
- Fluorescence & Luminescence

- Color Measurement
- Polarimetry & Refractometry
- Ellipsometry

LIFE SCIENCE INSTRUMENTATION

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

LAB AUTOMATION & SOFTWARE

- Market Overview
- Liquid Handling
- Microplate Readers
- Multiplex/HT ELISA
- Robotics
- LIMS, ELN, & SDMS
- Informatics

MATERIALS CHARACTERIZATION

- Market Overview
- Physical Testing
- Thermal Analyzers
- Particle Characterization
- Rheometry & Viscometry
- Calorimetry
- Petroleum Analyzers

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■ Report Contents

SURFACE SCIENCE

- Market Overview
- Optical Microscopy
- Electron Microscopy
- Confocal & Advanced Microscopy
- Scanning Probe Microscopy
- Surface Analyzers

GENERAL ANALYTICAL TECHNIQUES

- Market Overview
- Electrochemistry
- Lab Balances
- Radioactivity
- Dissolution Testing
- CFA & Discrete Analyzers

LAB EQUIPMENT

- Market Overview
- Lab Centrifuges
- Transfection
- Extraction Techniques
- Water Purification
- Bioreactors & Fermenters
- Gas Generators
- Laboratory Incubators
- Biological Safety Cabinets
- Fume Hoods
- Microwave-Assisted Chemistry
- Concentrators & Evaporators
- Lab Washers
- Shakers and Stirrers

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Global Datastream

As a complement to the Global Assessment Report, the **Global Datastream is an add on item** that provides you with the most up-to-date market data in **four quarterly installments**. Each installment will be released at the end of following quarter (**i.e., data for Q1 will be released at the end of Q2**) due to the timeframe in which financials for various companies are released. These comprehensive data updates will come in a form easily useable by your marketing, business development, product management teams, and company executives, and will ensure you always have the most up-to-date information on the analytical and life science instrumentation market. Also included in each update is how fluctuations in major global **currencies have affected real growth** for each of the markets examined, which is not available in the Global Assessment Report.

Each installment contains the following sections:

- Definition
- Overall Market Overview
- Demand by Region
- Chromatography
- Mass Spectrometry
- Atomic Spectrometry
- Molecular Spectrometry
- Life Science
- Surface Science
- Materials Characterization
- Lab Automation & Equipment

Each section contains the following data for the previous two years for each market segment, region, and application sector :

- Quarterly growth (\$Mil)
- Quarterly percent growth
- Currency Effect
- Organic market growth
- Total growth (\$Mil)
- Estimated growth over the next 5 years (\$Mil)
- Market growth CAGR
- Text Analysis for each quarter

2019 SDi Global Assessment Report — The Laboratory Analytical & Life Science Instrumentation Industry

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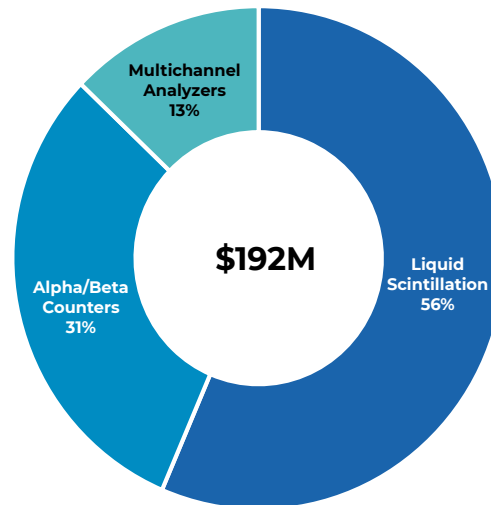
Global Datastream

The following is a sample of the Quarterly Global Datastream Deliverable. For the sample file or a walkthrough of the Assessment Report and Datastream, please call **703.770.3080 x19** or email reports@strategic-directions.com.

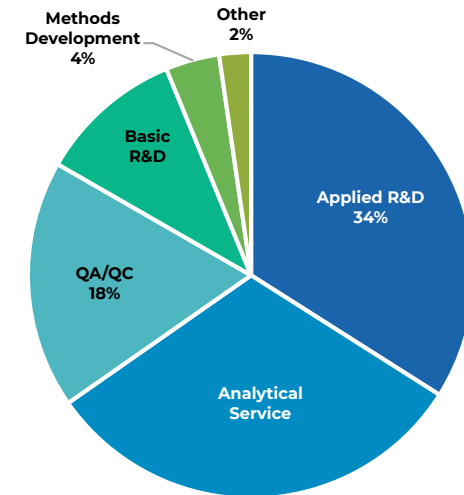
B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI
Chromatography	2016 (\$Mil)					2017 (\$Mil)					Market Growth 2016 - 2017					Currency Effects 2016 - 2017					Organic Market Growth 2016 - 2017					Total (\$Mil)		Est. (\$Mil)		Market Growth CAGR			
	Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4		2016	2017	2018	2022		'16 - '17	'17 - '18	'17 - '22
Analytical HPLC	800	1,000	1,000	1,200		880	1,100	1,100	1,320		10.0%	10.0%	10.0%	10.0%		-1.0%	-2.0%	1.0%	2.0%		11.0%	12.0%	9.0%	8.0%		4,000	4,400	4,752	6,171		10.0%	8.0%	7.0%
Preparative HPLC	200	250	250	300		220	275	275	330		10.0%	10.0%	10.0%	10.0%		1.0%	-2.0%	-1.0%	-2.0%		9.0%	12.0%	11.0%	12.0%		1,000	1,100	1,188	1,543		10.0%	8.0%	7.0%
Gas Chromatography	400	500	500	600		440	550	550	660		10.0%	10.0%	10.0%	10.0%		0.5%	-2.0%	1.0%	2.0%		9.5%	12.0%	9.0%	8.0%		2,000	2,200	2,376	3,086		10.0%	8.0%	7.0%
Ion Chromatography	100	125	125	150		110	138	138	165		10.0%	10.0%	10.0%	10.0%		-2.0%	-2.0%	-1.0%	-2.0%		12.0%	12.0%	11.0%	12.0%		500	550	594	771		10.0%	8.0%	7.0%
LPLC	100	125	125	150		110	138	138	165		10.0%	10.0%	10.0%	10.0%		-1.0%	-2.0%	1.0%	2.0%		11.0%	12.0%	9.0%	8.0%		500	550	594	771		10.0%	8.0%	7.0%
US & Canada	442	552	552	663		528	660	660	792		19.5%	19.5%	19.5%	19.5%		0.3%	-0.3%	0.3%	0.4%		19.2%	19.8%	19.2%	19.1%		2,210	2,640	2,816	3,291		19.5%	6.7%	4.5%
Europe	503	629	629	754		528	660	660	792		5.0%	5.0%	5.0%	5.0%		-3.0%	-3.0%	3.0%	3.0%		8.0%	8.0%	2.0%	2.0%		2,514	2,640	2,904	3,879		5.0%	10.0%	8.0%
China	160	200	200	240		176	220	220	264		10.0%	10.0%	10.0%	10.0%		-5.0%	-3.0%	0.0%	0.0%		15.0%	13.0%	10.0%	10.0%		800	880	924	1,293		10.0%	5.0%	8.0%
Japan	168	210	210	251		176	220	220	264		5.0%	5.0%	5.0%	5.0%		1.0%	-1.0%	-7.0%	-3.0%		4.0%	6.0%	12.0%	8.0%		838	880	968	1,293		5.0%	10.0%	8.0%
India	80	100	100	120		88	110	110	132		10.0%	10.0%	10.0%	10.0%		1.0%	3.0%	3.0%	3.0%		9.0%	7.0%	7.0%	7.0%		400	440	462	647		10.0%	5.0%	8.0%
Other Asia Pacific	84	105	105	126		88	110	110	132		5.0%	5.0%	5.0%	5.0%		1.0%	1.0%	0.0%	1.0%		4.0%	4.0%	5.0%	4.0%		419	440	484	647		5.0%	10.0%	8.0%
Latin America	80	100	100	120		88	110	110	132		10.0%	10.0%	10.0%	10.0%		1.0%	1.0%	1.0%	1.0%		9.0%	9.0%	9.0%	9.0%		400	440	462	647		10.0%	5.0%	8.0%
Rest-of-World	84	105	105	126		88	110	110	132		5.0%	5.0%	5.0%	5.0%		-1.0%	-1.0%	-1.0%	-1.0%		6.0%	6.0%	6.0%	6.0%		419	440	484	647		5.0%	10.0%	8.0%
Pharma/Bio	402	502	502	603		440	550	550	660		9.5%	9.5%	9.5%	9.5%												2,009	2,200	2,394	4,120		9.5%	8.8%	13.4%
Public	419	524	524	629		440	550	550	660		5.0%	5.0%	5.0%	5.0%												2,095	2,200	2,266	2,312		5.0%	3.0%	1.0%
Ag/Food	320	400	400	480		352	440	440	528		10.0%	10.0%	10.0%	10.0%												400	400	420	644		0.0%	5.0%	10.0%
Environmental	160	200	200	240		176	220	220	264		10.0%	10.0%	10.0%	10.0%												800	880	968	1,123		10.0%	10.0%	5.0%
Hospital/Clinical	80	100	100	120		96	120	120	144		20.0%	20.0%	20.0%	20.0%												400	480	552	773		20.0%	15.0%	10.0%
Industrial	459	574	574	689		528	660	660	792		15.0%	15.0%	15.0%	15.0%												2,296	2,640	2,904	3,369		15.0%	10.0%	5.0%
Total	1,600	2,000	2,000	2,400		1,760	2,200	2,200	2,640		10.0%	10.0%	10.0%	10.0%												8,000	8,800	9,504	12,342		10.0%	8.0%	7.0%

Sample Data

Radioactivity Demand by Technique, 2018



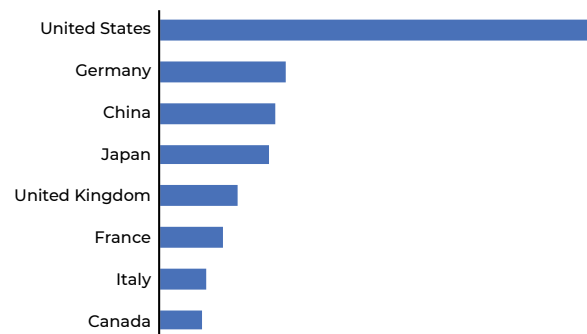
Radioactivity Demand by Function, 2018



Each product chapter, in this example Radioactivity, consists of the following sections:

- Technology Overview
- Key Market Dynamics
- Product Segments
- Unit Shipments
- Industry & Function
- Application Segmentation
- Regional Demand
- Competitive Situation
- Recent Developments

Radioactivity Demand by Country, 2018



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About Strategic Directions International

Strategic Directions International (SDi) is the leading business intelligence firm in the highly specialized field of analytical and life science instruments. Its client list includes virtually every major analytical instrumentation company in the United States, Europe, and Japan. Founded in 1981, the Los Angeles-based company has published hundreds of market reports and provided proprietary consulting services for a multitude of clients.

The library of market knowledge and data that SDi has cultivated over the years has been researched by senior consultants and a team of expert scientific market researchers who actively update and cross-check information through both primary and secondary sources.

Each year we also develop publications that focus on the market for a particular technology segment, geographical region, industry, or application. These reports rely heavily on secondary sources and provide the reader with valuable market figures and representations, including segmented market demand, unit sales, five-year growth

forecast, competitive situation, and other relevant insights or summaries. Many of these reports also include a section devoted to end user perspectives, based on results from a survey of scientists and researchers whose work reflects the focus of the publication.

SDi often works in close association with BioInformatics Inc., the leading research and advisory company serving life science markets. This Arlington, Virginia-based firm leverages the world's largest panel of scientific and clinical customers, The Science Advisory Board, for both quantitative survey research and in-depth thought leader interviews. SDi and BioInformatics are both part of Science and Medicine Group, an expanding collection of companies focused on research and advisory services that span the laboratory, scientific, and medical space.

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