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.
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.
INSTRUMENT INDUSTRY REVENUES AND GROWTH

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The 2017 SDi Global Assessment Report: The Laboratory Analytical & Life Science Instrumentation Industry 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.
REPORT OVERVIEW

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The Laboratory Analytical & Life Science Instrumentation Industry

REPORT HIGHLIGHTS (continued)
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.
REPORT OVERVIEW (continued)

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- Sources Of Information
- Report Organization

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REPORT OVERVIEW (continued)

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- Laboratory Incubators
- Biological Safety Cabinets
- Bioreactors/Fermenters
- Microwave Assisted Chemistry
- Lab Washers
- Laboratory Shakers, Rotators And Stirrers
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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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