

Mass Spectrometry and Chromatography in Diagnostics Market - A Global and Regional Analysis: Focus on Product Type, Application Type, Sample Type, Testing Type, and Country - Analysis and Forecast, 2025-2035

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Abstracts

The global mass spectrometry and chromatography in diagnostics market was valued at \$797.5 million in 2024 and is expected to reach \$1,724.7 million by 2035, growing at a CAGR of 7.54% between 2025 and 2035. The mass spectrometry and chromatography markets are critical components of the broader analytical and life sciences instrumentation sector. Both technologies offer sophisticated methods for the separation, identification, and quantification of chemical and biological substances and have been instrumental in driving advances across a variety of fields, including pharmaceuticals, environmental monitoring, diagnostics, and food safety, among others. For diagnostics applications, these technologies are mostly not used in isolation but are integrated into workflows. For instance, liquid chromatography-mass spectrometry combines the separation capabilities of liquid chromatography with the mass analysis power of mass spectrometry. This integration is particularly effective in complex sample analysis, where components need to be separated before their mass and structure can be determined. Such hybrid systems are critical in clinical settings for the high-throughput analysis of patient samples, offering a comprehensive understanding that guides diagnosis and treatment. The key applications of mass spectrometry and chromatography in diagnostics include vitamin profiling and hormone profiling, among others.

Market Introduction

The mass spectrometry and chromatography in diagnostics market is experiencing

rapid growth, driven by multiple benefits offered by the technologies as compared to the traditional immunoassays, and continuous technological advancements in these technologies are further advancing their adoption. However, the high cost of acquisition of instrumentation, as well as the dearth of skilled professionals, is expected to hinder the growth of the global mass spectrometry and chromatography in diagnostics market.

Furthermore, there has been a shift toward the utilization of liquid chromatography-tandem mass spectrometry (LC-MS/MS) as a standard technique in diagnostics. The growing preference for LC-MS/MS in diagnostics is driven by its unparalleled analytical advantages, which include exceptional specificity, sensitivity, and the ability to conduct multiplex testing, qualities that are indispensable for complex diagnostic tasks. In addition to this, the integration of automated sample preparation systems in mass spectrometry-based diagnostics marks a pivotal advancement in clinical laboratory operations. This trend will continue to expand, driven by the increasing demands for faster, more accurate diagnostic testing and the ongoing advancements in technology.

Industrial Impact

This technology has a pivotal role in diagnostic applications such as therapeutic drug monitoring, vitamin analysis, hormone profiling, newborn screening, and infectious diseases, among others.

Market Segmentation:

Segmentation 1: by Product Type

Sample Preparation

Mass Spectrometry and Chromatography

Mass Spectrometry and Chromatography Segment to Dominate the Mass Spectrometry and Chromatography in Diagnostics Market (by Product Type)

The global mass spectrometry and chromatography in diagnostics market (by product type) has been dominated by the mass spectrometry and chromatography segment, which held 85.34% of the market share in 2024. This dominance has been driven by the high cost of the instrumentation of mass spectrometry and chromatography, and the

recurring use of consumables in diagnostics.

Segmentation 2: by Application Type

Therapeutic Drug Monitoring

Vitamins

Hormones

Methylmalonic Acid

Immunosuppressants

Clinical Toxicology

Others

Vitamins Segment to Dominate the Mass Spectrometry and Chromatography in Diagnostics Market (by Application Type)

The global mass spectrometry and chromatography in diagnostics market (by application type) has been dominated by the vitamins segment, which held 20.70% of the market share in 2024. This dominance is primarily due to their exceptionally high testing volumes driven by routine health checkups, preventive care programs, and chronic disease monitoring. These assays are ordered across a broad patient base and frequently repeated over time, resulting in sustained, large-scale testing demand.

Segmentation 3: by Sample Type

Blood

Urine

Serum

Plasma

Saliva

Serum to Dominate the Mass Spectrometry and Chromatography in Diagnostics Market (by Sample Type)

In 2024, serum outweighed the other segments in the global mass spectrometry and chromatography in diagnostics market (by sample type) due to its suitability for a broad spectrum of applications, from hormone profiling to vitamin analysis. This makes serum an ideal sample type for precise and comprehensive diagnostic tests. On the other hand, urine is expected to be the fastest-growing segment with a CAGR of 9.12% in the forecast period 2025-2035.

Segmentation 4: by Testing Type

Laboratory-Developed Tests

Commercial Assays

Laboratory-Developed Tests to Dominate the Mass Spectrometry and Chromatography in Diagnostics Market (by Testing Type)

In 2024, laboratory-developed tests outweighed the commercial assays segment in the global mass spectrometry and chromatography in diagnostics market (by testing type). On the other hand, the commercial assay segment is expected to be the fastest-growing segment with a CAGR of 7.97% in the forecast period 2025-2035.

Segmentation 5: by Region

North America

U.S.

Canada

Europe

Germany

U.K.

Spain

Italy

France

Rest-of-Europe

Asia-Pacific

China

Japan

India

Rest-of-Asia-Pacific

Latin America

Brazil

Mexico

Rest-of-Latin America

Middle East and Africa

GCC Countries

South Africa

Rest-of-Middle East and Africa

North America to Dominate the Mass Spectrometry and Chromatography in Diagnostics

Mass Spectrometry and Chromatography in Diagnostics Market - A Global and Regional Analysis: Focus on Product...

Market (by Region)

The global mass spectrometry and chromatography in diagnostics market (by region) has been dominated by North America, which held 45.10% of the market share in 2024 and is anticipated to retain its position in the market during the forecast period. The region boasts an advanced healthcare infrastructure, particularly in the U.S., which facilitates the adoption of cutting-edge medical technologies, including mass spectrometry and chromatography. Additionally, North America is the hub to many leading companies in the mass spectrometry and chromatography in diagnostics market, such as Agilent Technologies, Inc., Thermo Fisher Scientific Inc., and Danaher Corporation, among others, whose strong presence and continuous innovation drive the growth of the mass spectrometry and chromatography in diagnostics market.

Recent Developments in the Mass Spectrometry and Chromatography in Diagnostics Market

In July 2025, Waters Corporation and BD agreed to combine BD's Biosciences & Diagnostic Solutions business with Waters Corporation to strengthen their liquid chromatography and mass spectrometry portfolio, expanding high-volume, regulated testing capabilities and accelerating growth across life science and diagnostic markets.

In June 2025, Bruker Corporation launched the proteoElute nanoflow LC system to enable ultra-sensitive and reliable multiomics and proteomics analyses by combining advanced system monitoring, improved robustness, and reduced carryover for complex and low-input samples.

In May 2025, Bruker Corporation launched the timsOmni mass spectrometer to enable deep, high-speed proteoform sequencing and precise post-translational modification analysis by integrating timsTOF performance with Omnitrap-based multimodal fragmentation and advanced top-down proteomics capabilities.

In April 2025, Bruker Corporation made a majority investment in RECIPE Chemicals + Instruments to strengthen its clinical mass spectrometry portfolio by expanding access to high-throughput, chromatography-free, and LC-based therapeutic drug monitoring assays, improving laboratory efficiency, sustainability, and diagnostic throughput.

Demand – Drivers, Challenges, and Opportunities

Market Drivers:

Continuous Technological Advancements in Mass Spectrometry and Chromatography: Technological advancements are significantly enhancing diagnostic capabilities, addressing the limitations of traditional methods such as low sensitivity and cross-reactivity. The emergence of high-sensitivity and hyphenated techniques is enabling more accurate, rapid, and high-throughput molecular analysis, thereby strengthening clinical decision-making. As these innovations continue to evolve, they are expected to drive broader adoption and sustained growth in the diagnostics market.

Market Restraints:

High Initial Set-up Cost: The high cost of acquisition associated with mass spectrometry and chromatography systems poses a significant barrier to adoption, particularly for smaller laboratories and resource-constrained healthcare settings. Substantial upfront investments, coupled with ongoing operational expenses, limit accessibility to these advanced diagnostic technologies. Addressing these financial constraints through flexible models such as leasing or rentals will be critical to enabling broader market adoption.

Market Opportunities:

Focus on Emerging Markets for Expansion of Mass Spectrometry and Chromatography in Diagnostics: Emerging markets present significant growth opportunities for mass spectrometry and chromatography in diagnostics, driven by low current penetration and unmet diagnostic needs across regions such as Africa and parts of Asia. Addressing key barriers such as high costs and limited technical expertise through affordable, user-friendly systems and local training initiatives can enable wider adoption. Strategic expansion in these regions is expected to unlock substantial market potential and enhance diagnostic capabilities.

How Can This Report Add Value to an Organization?

Product/Innovation Strategy: The global mass spectrometry and chromatography in diagnostics market has been segmented based on various categories, such as by product type, application type, sample type, testing type, and region.

Growth/Marketing Strategy: Partnerships, alliances, funding, new offerings, and business expansions together accounted for the maximum number of key developments of the total developments in the mass spectrometry and chromatography in diagnostics market.

Competitive Strategy: The global mass spectrometry and chromatography in diagnostics market consists of various public and a few private companies. Key players in the mass spectrometry and chromatography in diagnostics market, analyzed and profiled in the study involve established players that offer various kinds of products.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

Years from 2024 to 2035 have been considered for the global market size estimation, 2024 has been considered as the base year, and 2025 to 2035 as the forecast period.

The market contribution of mass spectrometry and chromatography in diagnostics is anticipated to grow substantially in the future, with projections based on historical analysis of available solutions.

Revenues from companies have been sourced from their annual reports for FY2023 and FY2024. For private companies, revenue estimates are derived from primary research inputs, funding history, market collaborations, and operational performance.

The report includes mass spectrometry and chromatography instruments, consumables, and software. The report also covers instruments and consumables involved in the sample preparation of these technologies. Additionally, the report only focuses on applications such as therapeutic drug monitoring, vitamin analysis, hormone profiling, immunosuppressants, methylmalonic acids, clinical toxicology, newborn screening, and infectious diseases, among others.

Furthermore, other applications, such as food testing, environmental testing, and chemicals, have been excluded from the scope of the report. Additionally, services are not part of the study.

Primary Research

The primary sources involve industry experts in mass spectrometry and chromatography in diagnostics. Key opinion leaders (KOLs) such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from the primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of the report's segmentation and key qualitative findings
- understanding the competitive landscape and business model
- current and proposed production values of a product by market players
- validation of the numbers of the different segments of the market in focus
- percentage split of individual markets for regional analysis

Secondary Research

Open Sources

Certified publications, articles from recognized authors, white papers, directories, and major databases, among others

Annual reports, SEC filings, and investor presentations of the leading market players

Company websites and a detailed study of their product portfolio

Gold standard magazines, journals, white papers, press releases, and news articles

Paid databases

The key data points taken from the secondary sources include:

segmentations and percentage shares

data for market value

key industry trends of the top players in the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

Key Market Players and Competition Synopsis

The companies that are profiled have been selected based on inputs gathered from primary experts and analysing company coverage, product portfolio, and market penetration.

Some of the prominent companies in this market are:

Agilent Technologies, Inc.

Thermo Fisher Scientific Inc.

Waters Corporation

Tecan Group Ltd.

Danaher Corporation

Shimadzu Corporation

Merck KGaA

Bio-Rad Laboratories, Inc.

PerkinElmer Inc.

Promega Corporation

Restek Corporation

Gerstel GmbH & Co. KG

Bruker

New England Biolabs

Hamilton Company

VWR International, LLC

Chromsystems Instruments & Chemicals GmbH

Zivak

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