

# **Global Cryo-electron Microscopy Market Size study & Forecast, by Product & Service (Instruments, Fully Automated Instruments, Semi-Automated Instruments, Software, Services), by Technology (Electron Crystallography, Single Particle Analysis, Cryo-electron Tomography, Other Technologies), by Voltage (300 kV, 200 kV, 120 kV), by Application (Life Science Research & Academia, Cancer Research, Omics Research, Pharma & Biotech Manufacturing, Cell & Gene Therapy, Vaccines, Preclinical & Clinical Research, Healthcare/Medical Research, Disease Diagnosis & Pathology, Toxicology Studies, Material Analysis, Nanotechnology, Other Applications) and Regional Analysis, 2023-2030**

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## **Abstracts**

Global Cryo-electron Microscopy Market is valued approximately USD 1.1 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 11.6% over the forecast period 2023-2030. Cryo-electron microscopy (Cryo-EM) is a cutting-edge imaging technique used in structural biology to visualize the three-dimensional structures of biological samples, such as proteins and macromolecular complexes, at near-atomic resolution. This technique has revolutionized the field of structural biology, enabling the study of previously inaccessible targets and contributing to advancements in drug discovery, bimolecular research, and understanding the fundamental

mechanisms of life. The market drivers boosting the growth are increasing trials of cell and gene therapies and increasing demand for high-resolution imaging.

Cryo-EM plays a crucial role in characterizing the structures and interactions of viral vectors, gene delivery systems, and modified cells used in cell and gene therapies. By providing high-resolution imaging, Cryo-EM enables researchers to gain insights into the mechanisms and behavior of these therapies at the molecular level. According to Statista, in 2022, the United States witnessed over 574 ongoing clinical trials for cell and gene therapies, while Europe hosted 256 trials in the same domain. Moreover, increasing demand for Cryo-EM services and integration of Cryo-EM data with computational approaches is expected to create abundant opportunities. However, the high cost of Cryo-electron equipment and infrastructure and limited availability of skilled professionals stifles market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Cryo-electron Microscopy Market study includes Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 due to an increase in funding to support research activities, an increase in the number of clinical trials, and expanding applications in the healthcare and medical sectors. However, Asia Pacific is expected to become the fastest growing during the forecast period, owing to factors such as growing adoption of Cryo-EM in the pharma industry due to its expanding applications and rising R&D expenditure by government to support advancements in the field.

Major market player included in this report are:

Molecular Devices, LLC.

Intertek Group plc

JEOL Ltd.

Nikon Instruments Inc.

Thermo Fisher Scientific Inc.

Olympus Corporation

Helmet Hund GmbH

NanoFocus AG

Lasertec Corporation

Keyence Corporation

Recent Developments in the Market:

In June 2022, Hitachi High-Tech Corporation launched the AFM100, a state-of-the-art microscope that brings substantial advancements in sensitivity for measuring physical properties. This cutting-edge instrument enables precise measurements at the atomic and molecular scale, opening up new possibilities for scientific research and

exploration.

In February 2022, Thermo Fisher Scientific completed the acquisition of Eikon Therapeutics, a startup specializing in Cryo-EM technology for drug discovery and structural biology research. This strategic acquisition will enhance Thermo Fisher's presence in the Cryo-EM market, reinforcing its leadership and expanding its capabilities in providing advanced solutions for customers in the field of structural biology and drug discovery.

Global Cryo-electron Microscopy Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered – Product & Service, Technology, Voltage, Application, Region  
Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent up to 8 analyst's working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values to the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters detailed information about the crucial aspects such as driving factors & challenges which will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with the detailed analysis of competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Product & Service:

Instruments

Fully Automated Instruments

Semi-Automated Instruments

Software

Services

By Technology:

Electron Crystallography

Single Particle Analysis  
Cryo-electron Tomography  
Other Technologies

By Voltage:

300 kV

200 kV

120 kV

By Application:

Life Science Research & Academia

Cancer Research

Omics Research

Pharma & Biotech Manufacturing

Cell & Gene Therapy

Vaccines

Preclinical & Clinical Research

Healthcare/Medical Applications

Disease Diagnosis & Pathology

Toxicology Studies

Material Analysis

Nanotechnology

Other Applications

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan  
Australia  
South Korea  
RoAPAC

Latin America  
Brazil  
Mexico

Middle East & Africa  
Saudi Arabia  
South Africa  
Rest of Middle East & Africa

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