

Global Hematological Malignancies Emerging Therapeutics Market 2023

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Abstracts

The global 3D protein structure analysis market was valued at \$1.09 billion in 2022 and is projected to reach \$1.83 billion by 2029, with a 7.4% CAGR from 2023-2029. Market growth is driven by advancements in equipment and increased R&D expenditure. Protein structure analysis is crucial in biotechnology for molecular docking, drug design, and understanding protein function. X-Ray crystallography is the primary method, with cryo-electron microscopy and NMR spectroscopy also used. Leading manufacturers like Bruker, JEOL, and Spectris offer equipment. Partnerships and initiatives enhance capabilities. Demand drivers include technological advancements, increased R&D investment, and automation in X-Ray crystallography workflows. Market limitations include instrument restrictions, a shortage of personnel, and high cost and time requirements.

Market Segmentation

The market is segmented based on various factors, including product, end user, and region.

Segmentation by Product

Consumable

Equipment

Computational Software

Segmentation by End User

Biopharmaceutical Company

Academic and Research Institute

Other End User

Segmentation by Region

North America

Europe

Asia-Pacific

Rest-of-the-World

The global 3D protein structure analysis market is expected to be dominated by the consumable segment based on product. This is due to the wide availability of reagents, kits, screens, solvents, detergents, and other consumables used in various technologies for 3D protein structure analysis. The consumable segment held a market share of 63.3% in 2022 and is projected to grow at a CAGR of 7.5% from 2023 to 2029.

Consumables in this context refer to laboratory products that are used until they are depleted and then discarded. Key players in the market supply reagents, modern screens for crystallization, solvents, and other consumables used in protein structure analysis techniques. The demand for consumables is high in the 3D protein structure analysis market due to their frequent use in protein structure analysis equipment.

The biopharmaceutical company segment dominates the market in terms of end users. The increasing application of protein structure analysis in various industries, particularly pharmaceutical companies for drug development, contributes to its growth. The biopharmaceutical company segment held a market share of 49.3% in 2021 and is expected to grow at a CAGR of 7.0% from 2023 to 2029. Protein structure analysis has gained significant importance in the past decade, primarily due to data analysis from various techniques. Informatics tools and computational software have enhanced the performance of the biopharmaceutical industry.

North America dominated the global market in 2022, driven by the markets in the United States and Canada. Concerns regarding the quality, safety, and composition of pharmaceuticals have led to advancements in molecular biology and genetic engineering, increasing the use of protein analysis technology. However, the high cost of equipment and software may hinder the growth of the protein analysis market in this region. Nevertheless, increased R&D spending by pharmaceutical and biotech companies, along with government funding, are expected to drive the global 3D protein structure analysis market. The Asia-Pacific region is anticipated to exhibit the highest CAGR of 8.3% during the forecast period. Several APAC countries are actively working towards enhancing the adoption of drug discovery and development solutions in the region, leading to significant growth in software-based technologies.

Competitive Landscape

The companies profiled in this report were selected based on input from primary experts, analysis of company coverage, evaluation of product portfolios, and assessment of market penetration. The key companies included are Bruker Corporation, JEOL Ltd., Spectris plc, Thermo Fisher Scientific Inc., Merck KGaA, Schrodinger, Inc., Molecular Dimensions, Arinax Scientific Instrumentation, Cambridge Isotope Laboratories, Inc., HAMPTON RESEARCH CORP., DNASTAR, RosettaCommons.org, Rigaku Corporation, Dassault Systemes, and Jena Bioscience GmbH.

Recent Industry Developments

JEOL Ltd. announced the development of the CRYO ARM 200 II (JEM-Z200CA) cryo-electron microscope in February 2022, designed for single particle protein analysis.

In November 2021, JEOL Ltd. introduced the ECZ Luminous nuclear magnetic resonance console (JNM-ECZL series), which represents a significant advancement in spectrometer miniaturization and performance enhancement.

Thermo Fisher Scientific Inc. launched the Thermo Scientific Selectris Imaging Filter and Thermo Scientific Selectris X Imaging Filter in October 2020, revolutionizing cryo-electron microscopy (cryo-EM) by enabling true atomic resolution observation of proteins.

In April 2021, Thermo Fisher Scientific Inc. unveiled the Thermo Scientific E-CFEG, an accessory for the Thermo Scientific Krios Cryo-TEM and the company's latest cold field emission gun. The E-CFEG combines components to achieve unprecedented resolution in single particle analysis (SPA).

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