

Global Microcrystal Electron Diffraction (MicroED) Service Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Microcrystal Electron Diffraction (MicroED) Service market size is expected to reach \$ 391 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

Microcrystal Electron Diffraction (MicroED) Service is a cryo-transmission electron microscopy (Cryo-TEM)-based nanocrystal structure resolution technology specifically designed for analyzing microcrystalline samples smaller than 1 micrometer in size that are difficult to structure using traditional X-ray diffraction or single-crystal diffraction. This service acquires diffraction data by continuously rotating the sample at extremely low electron doses under cryogenic conditions (approximately -180°C). Dedicated software (such as RED and XDS) is then used to reconstruct the three-dimensional reciprocal lattice space, accurately determining cell parameters, space group, and atomic coordinates. Its core advantages lie in its ability to resolve small organic molecules, peptides, drug cocrystals, and radiation-sensitive materials ranging from a few nanometers to submicrometers in size, with low sample requirements (micrograms) and no need to cultivate large crystals. The service workflow typically includes: microcrystal screening and cryo-sample grid preparation, cryo-EM data acquisition, automatic diffraction pattern indexing and structure refinement, and finally, delivery of a three-dimensional structural model and validation report. This technology is widely used in structural biology, drug discovery, materials chemistry, and chiral molecule identification, significantly accelerating the efficiency of structural resolution for difficult-to-crystallize molecules.

The global Microcrystal Electron Diffraction (MicroED) Service market exhibits significant regional differentiation. North America and Europe, as the originators of the

technology, leverage high-end cryo-electron microscopy equipment and mature structural biology systems to lead early-stage technology development and standard setting, focusing their services on innovative drug target analysis and research on difficult-to-crystallize proteins. The Asia-Pacific region (especially China and Japan) is the core of growth, benefiting from government support for biomedical funds and the expansion of the CRO industry. Companies such as Viva Biotech and XtalPi are rapidly deploying MicroED platforms, driving service localization and cost reduction. Future trends focus on automated data acquisition, AI-assisted structural analysis, and technologies combined with cryo-electron microscopy. Major obstacles include: extremely high equipment purchase and maintenance costs (over US\$2 million per microscope), a shortage of professional talent, low sample preparation success rates (especially for radiation-sensitive crystals), and insufficient data standardization.

This report studies the global Microcrystal Electron Diffraction (MicroED) Service demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Microcrystal Electron Diffraction (MicroED) Service, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Microcrystal Electron Diffraction (MicroED) Service that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Microcrystal Electron Diffraction (MicroED) Service total market, 2021-2032, (USD Million)

Global Microcrystal Electron Diffraction (MicroED) Service total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Microcrystal Electron Diffraction (MicroED) Service total market, key domestic companies, and share, (USD Million)

Global Microcrystal Electron Diffraction (MicroED) Service revenue by player, revenue and market share 2021-2026, (USD Million)

Global Microcrystal Electron Diffraction (MicroED) Service total market by Type, CAGR, 2021-2032, (USD Million)

Global Microcrystal Electron Diffraction (MicroED) Service total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Microcrystal Electron Diffraction (MicroED) Service market based on the following parameters - company overview,

revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Creative Biostructure, CryoSol-World, ELDICO Scientific, JEOL Ltd., NanoImaging Services, NanoMEGAS SPRL, NovAliX, Oxford Instruments, ReadCrystal, Shuimu Biosciences, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Microcrystal Electron Diffraction (MicroED) Service market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Microcrystal Electron Diffraction (MicroED) Service Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Microcrystal Electron Diffraction (MicroED) Service Market, Segmentation by

Type:

Single Crystal Cultivation

No Single Crystal Cultivation Required

Global Microcrystal Electron Diffraction (MicroED) Service Market, Segmentation by Method:

Rotation Method

Faulting Method

In-Situ Quenching Method

Others

Global Microcrystal Electron Diffraction (MicroED) Service Market, Segmentation by Crystal Size:

Crystal Size > 500nm

Crystal Size 200-500nm

Crystal Size 50-200nm

Crystal Size 200nm-1 μ m

Global Microcrystal Electron Diffraction (MicroED) Service Market, Segmentation by Application:

Proteins

Small Molecules

Other

Companies Profiled:

Creative Biostructure

CryoSol-World

ELDICO Scientific

JEOL Ltd.

NanoImaging Services

NanoMEGAS SPRL

NovAliX

Oxford Instruments

ReadCrystal

Shuimu Biosciences

UniTemp GmbH

Viva Biotech

WuXi Biortus Biosciences Co. Ltd.

XtalPi Inc

NanoMicro Technologies

SPERA PHARMA

Creative Bioarray

Rigaku

Triclinic Labs

Key Questions Answered

1. How big is the global Microcrystal Electron Diffraction (MicroED) Service market?
2. What is the demand of the global Microcrystal Electron Diffraction (MicroED) Service market?
3. What is the year over year growth of the global Microcrystal Electron Diffraction (MicroED) Service market?
4. What is the total value of the global Microcrystal Electron Diffraction (MicroED) Service market?
5. Who are the Major Players in the global Microcrystal Electron Diffraction (MicroED) Service market?
6. What are the growth factors driving the market demand?

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