

# Metabolomics: Technologies and Applications - A Global Market Overview

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## Abstracts

Large pharma companies have yet to take on a full-blown adoption of metabolomic technologies, when compared to proteomic and genomic research. This is because of the lingering uncertainties as to the advantages offered by metabolomics that have been the outcome of failed proteomics and genomics research programs. Through some recent accomplishments have been able to dispel some of these doubts, wider adoption and acceptance of metabolomics would necessitate additional landmark successes in R&D. In all probability, the future of metabolomics is slated to hinge on discovering biomarkers for determining the presence of disease in an individual biological system. As biological inputs, such as blood glucose levels for diabetes or high cholesterol levels for heart disease, are already being utilized for confirming disease presence, metabolomics can derive benefit from an understanding of biochemical pathways. The existing focus of metabolomics has been on 20-100 different metabolites and while this constitutes a very small proportion compared to other fields of “omics,” this discipline has been making robust progress in discovering biomarkers.

Metabolomics analytical techniques analyzed in this report includes Separation Techniques – Capillary Electrophoresis, Gas Chromatography, High Performance Liquid Chromatography (HPLC) and Ultra Performance Liquid Chromatography (UPLC); and Detection Techniques – Mass Spectrometry, Nuclear Magnetic Resonance Spectroscopy and Surface-Based Mass Analysis. The report also analyzes the metabolomics applications comprising Biomarker Discovery, Drug Discovery, Nutrigenomics, Toxicology Testing and Other Applications. Metabolomics therapeutic areas explored in this study includes Cardiology, Neurology, Oncology and Other Diseases.

The global markets for the above mentioned metabolomic analytical techniques, end-

use applications and the therapeutic areas are analyzed in terms of value in USD. Metabolomic separation techniques account for over half of the global metabolomics market estimated at US\$395.2 million in 2014 while detection techniques shares with US\$308.8 million. Biomarker discovery projected to be the fastest growing end use sector with 2014-2020 CAGR of 25.2% and also estimated the largest market for metabolomics in 2014 with US\$252.8 million closely followed by drug discovery with US\$211.1 million.

The report reviews, analyses and projects the metabolomics technologies, applications and therapeutic areas market for global and the regional markets including North America, Europe, Asia-Pacific and Rest of World. The regional markets further analyzed for 9 independent countries across North America – The United States and Canada; Europe – France, Germany, Italy and the United Kingdom; Asia-Pacific – China, India and Japan.

This 508 page global market report includes 306 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. This report profiles 20 key global players and 33 major players across North America – 20; Europe – 9; and Asia-Pacific – 4. The research also provides the listing of the companies engaged in research and development, manufacturing and supply of metabolomics technologies and instruments. The global list of companies covers addresses, contact numbers and the website addresses of 92 companies.

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Bio-Rad Laboratories, Inc.

Bruker Corporation

Danaher Corporation

Genedata AG

GERSTEL GmbH & Co. KG

Human Metabolome Technologies, Inc.

LECO Corporation

Metabolomic Discoveries GmbH

Metabolomic Technologies Inc.

Metabolomx

Metabolon, Inc.

Phenomenome Discoveries Inc.

Shimadzu Corporation

Sigma-Aldrich Co. LLC.

Stemina Biomarker Discovery, Inc.

Thermo Fisher Scientific Inc

Waters Corporation

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Thermo Fisher Scientific Inc Announces New Immunoassay for Identification of Hydrocodone

Agilent Technologies and University of Toronto in Collaboration

BIOCRATES Life Sciences AG Introduces Standardized Metabolomics-Based Bile Acids Kit

Metabolon Collaborates with Metdia Biotech for European Launch of Quantose Prediabetes Tests

Human Metabolome Technologies and MYOS Corporation Enter Into Research Agreement

Phenomenome Discoveries Inc (PDI) in Collaboration with Bio Medical Laboratories

Waters Introduces Progenesis QI Version 2.0 for Small Molecule Data Analysis

IROA Technologies and University of Florida in a Partnership  
Chenomx Launches NMR Suite Version 8.0  
Bio-Rad Launches Bio-Plex Pro RBM Human Metabolic and Hormone Assays  
Bio-Rad Introduces Vitamin D Kit for BioPlex 2200 system  
Bruker Corporation Installs the World's Highest Field 21 Tesla Magnet for FT-ICR Mass Spectrometry  
Metabolon Collaborates with PATIA Biopharma  
AB Sciex Launches MasterView Food Testing Software  
Agilent Technologies and Bruker in an Agreement  
Bruker Launches a Slew of Solutions  
Agilent Technologies and Seoul National University in Collaboration  
Metabolon and GSK in a Partnership  
Shimadzu Introduces New Gas Chromatograph Mass Spectrometer  
Metabolon Introduces Fourth Generation DiscoveryHD4 Metabolomics Platform  
Metabolon Introduces MetaboLync  
AB SCIEX's Releases Newborn Screening Solution  
Bruker Launches GC-APCI II GC-MS Interface with Automatic MS Calibration  
BIOCRATES Launches AbsoluteIDQ p180 for Alzheimer's disease  
Metabolon Enters Into Collaboration with Human Longevity, Inc.  
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Agilent Technologies Launches New ProPulse NMR Platform  
Human Metabolome Technologies Granted Patent from Japanese Patent Office  
Global Genomics Group (G3) Partners with Metabolon  
LipoScience Collaborates with Scripps Health  
AB SCIEX Expands Singapore Operations  
AB SCIEX Opens New Facility in the Middle East  
Agilent Technologies Partners with Daegu Gyeongbuk Institute of Science and Technology  
Chenomx Releases New Version of NMR Suite  
Bruker Releases maXis HD Ultra-High Resolution QTOF  
Agilent Technologies Splits Business Operations  
Bruker Develops Cost-Effective Approach for Screening Inborn Errors of Metabolism using NMR  
Shimadzu Launches LabSolutions CS Chromatography Data System  
Metabolon and DHMRI in Collaboration  
Shimadzu Launches the LCMS-8050 High-Sensitivity, Ultra-Fast Triple Quadrupole LC-MS/MS

AB SCIEX, Genedata and LECO in Partnership  
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Metabolon's Quantose Prediabetes Test Offers Diabetes Outcome Studies  
Shimadzu Launches new LC/MS/MS Method Package for Primary Metabolites  
AB SCIEX, Genedata and LECO in Partnership  
Waters Expands its Product Line by Launching SYNAPT G2-Si Mass Spectrometer  
Bruker Collaborates with SCiLS GmbH for Using SCiLS Lab Software in MALDI Imaging  
Agilent Technologies and Shimadzu in an Agreement  
LipoScience Commences Clinical Development of NMR-Based Cardiovascular Diagnostic Test  
Metabolon Launches TrueVision Metabolomics Offering and Online Client Tools  
Agilent Launches Improved NMR Data-Acquisition Software  
AB SCIEX and LECO in a Partnership  
LipoScience in a Research Agreement with Duke University School of Medicine  
Chenomx Inc. and Spain's Centre for Omic Sciences Enter into Partnership  
Human Metabolome Technologies' US Operations Expanded  
Genedata and LECO in a Partnership  
Bruker Launches eXtreme Resolution (XR) Fourier Transform Mass Spectrometer (FTMS)  
Waters and Non Linear Dynamics in a Joint Development Agreement  
Lipomics Technologies Acquired by Metabolon  
Metabolon Technology Enters Into Germany with Validation of Helmholtz Zentrum Muenchen Laboratory  
PDI and Polymedco CDP Enter Into Licensing Agreement  
Agilent Technologies Acquires Dako  
BIOCRATES' Launches AbsoluteIDQ p180 und p150 for Waters Xevo TQ MS Editions  
AB SCIEX Introduces New TripleTOF 5600 System  
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LipoScience Applies for FDA 510(K) for Vantera Clinical Analyzer  
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Shimadzu and the University of Tokyo in Collaboration  
Metabolomic Discoveries GmbH and Durakult Enter Into a Research Partnership  
Metabolon Awarded Two Patents by United States Patent and Trademark Office  
Thermo Fisher Scientific Launches Workflow for Metabolomics Research



Metabolon Granted Patent for Metabolomics Methods in Drug Discovery

Metabolon's Biochemical Analysis Platform Granted Patent

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Shimadzu and CiRA Announce a Joint Research Agreement

Stemina Biomarker Discovery and Pioneer Hi-Bred Announce a Joint Research Agreement

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Agilent Technologies

Bio-Rad Laboratories, Inc.

Bruker Corporation

Chenomx Inc. (Canada)

Danaher Corporation

AB SCIEX

Eksigent

IROA Technologies

LECO Corporation

Liposcience, Inc.

Metabolomic Technologies Inc. (Canada)

Metabolomx

Metabolon, Inc.

Microsolv Technology Corporation

Phenomenome Discoveries Inc. (Canada)

Sigma-Aldrich Co. LLC.

Stemina Biomarker Discovery, Inc.

Thermo Fisher Scientific Inc

Waters Corporation

Nonlinear Dynamics Limited

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BASF SE (Germany)

Metanomics GmbH

Metanomics Health GmbH

Dataapex (Czech Republic)

Genedata AG (Germany)

Gerstel GmbH & Co. KG (Germany)

Metabolomic Discoveries GmbH (Germany)

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