

Mass Spectrometry Market Report by Technology (Triple Quadrupole (Tandem), Quadrupole TOF (Q-TOF), FTMS (Fourier Transform Mass Spectrometry), Quadrupole, Time-of-Flight (TOF), ION Trap, and Others), Application (Pharmaceuticals, Biotechnology, Chemical and Petrochemicals, Environmental Testing, Food & Beverage Testing, and Others), and Region 2023-2028

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Abstracts

The global mass spectrometry market size reached US\$ 6.1 Billion in 2022. Looking forward, IMARC Group expects the market to reach US\$ 9.1 Billion by 2028, exhibiting a growth rate (CAGR) of 6.9% during 2022-2028. The recent technological advancements, imposition of strict regulatory policies for quality control, growing focus on personalized medicine, and escalating funding for research and development (R&D) in both public and private sector are some of the major factors propelling the market. Mass spectrometry refers to an analytical technique used to measure the mass-to-charge ratio of ions. It includes gas chromatography-mass spectrometry (GC-MS), matrix-assisted laser desorption/ionization (MALDI), and liquid chromatography-mass spectrometry (LC-MS). Mass spectrometry offers numerous features, such as high sensitivity, specificity, and a broad dynamic range. It is widely used in drug discovery, environmental monitoring, forensics, food safety, clinical diagnostics, proteomics, petroleum exploration, and materials science. Mass spectrometry offers high-throughput capabilities, versatility in analysis, and compatibility with other techniques for multidimensional analysis.

The escalating funding for research and development (R&D) in both public and private sectors, which is providing financial support for acquiring advanced mass spectrometry

systems is propelling the market growth. Additionally, the growing concerns about environmental pollution that are necessitating the analysis of air and water samples are acting as another growth-inducing factor. Furthermore, the rising expansion of forensic science, coupled with the urgent requirement for substance analysis in criminal investigations, is contributing to the market growth. Besides this, the burgeoning field of metabolomics, which involves the detailed analysis of metabolites in biological samples, is bolstering the market growth. Apart from this, the adoption of mass spectrometry in academic research for various scientific explorations is catalyzing the market growth. Moreover, technological convergence, where mass spectrometry is being integrated with other techniques like chromatography, thus expanding its applicability, is strengthening the market growth.

Mass Spectrometry Market Trends/Drivers:

The recent technological advancements

The surge in technological advancements is significantly contributing to the expansion of the mass spectrometry market. Cutting-edge improvements, such as higher sensitivity, better accuracy, and rapid throughput are making these instruments indispensable in modern laboratories. Furthermore, technological progress is expanding the capabilities of mass spectrometry instruments to include the analysis of increasingly complex samples. Additionally, recent innovations like high-resolution mass spectrometry and tandem mass spectrometry that are providing unprecedented levels of detail and analytical depth are supporting the market growth. Moreover, the incorporation of real-time monitoring capabilities, allowing immediate data collection and interpretation, is strengthening the market growth. In addition, the miniaturization of mass spectrometry devices, leading to the creation of portable units that can be employed for on-site analysis, is favoring the market growth.

The imposition of strict regulatory policies for quality control

Regulatory requirements for quality control in industries, such as pharmaceuticals and food safety are propelling the mass spectrometry market growth. The introduction of stringent standards by regulatory agencies is prompting companies to rely on mass spectrometry for its high degree of accuracy and sensitivity in detecting impurities, ensuring product quality, and validating processes. In addition, mass spectrometry ensures that compounds meet purity standards and that contaminants are detected at extremely low concentrations. Furthermore, the widespread technology utilization in the food industry to ensure the absence of pesticides, toxins, and other contaminants is favoring the market growth. Moreover, these regulatory compulsions make mass spectrometry not just an option but a necessity for quality assurance in product development and manufacturing processes.

The growing focus on personalized medicine

The growing emphasis on personalized medicine is another pivotal factor stimulating

the mass spectrometry market. Healthcare is becoming increasingly tailored to individual patients, resulting in a higher demand for detailed molecular and genetic information. Mass spectrometry provides the capability to analyze biomarkers, metabolites, and proteins at a molecular level, thereby playing a significant role in proteomics and genomics research. These insights are crucial for understanding individual health profiles, predicting disease susceptibility, and tailoring treatments accordingly. Furthermore, the rise in personalized medicine is pushing healthcare providers and research institutions to invest in mass spectrometry technologies to keep up with the demand for precise, patient-specific data. As a result, the focus on personalized healthcare is not only boosting the application of mass spectrometry in existing markets but is also pioneering its entry into new avenues of medical science.

Mass Spectrometry Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global mass spectrometry market report, along with forecasts at the global, regional and country levels from 2023-2028. Our report has categorized the market based on technology and application.

Breakup by Technology:

Triple Quadrupole (Tandem)

Quadrupole TOF (Q-TOF)

FTMS (Fourier Transform Mass Spectrometry)

Quadrupole

Time-of-Flight (TOF)

ION Trap

Others

Triple quadrupole (tandem) dominates the market

The report has provided a detailed breakup and analysis of the market based on technology. This includes triple quadrupole (Tandem), quadrupole TOF (Q-TOF), FTMS (fourier transform mass spectrometry), quadrupole, time-of-flight (TOF), ION trap, and others. According to the report, triple quadrupole (tandem) represented the largest segment.

Triple quadrupole systems offer high sensitivity and selectivity, making them ideal for detecting low-abundance analytes in complex samples. Furthermore, they are versatile and can be applied to various fields, such as proteomics, metabolomics, pharmaceuticals, and environmental analysis. This multi-disciplinary application range contributes to their widespread adoption. Besides this, triple quadrupole mass spectrometers excel in quantitative measurements, as they provide excellent repeatability and accuracy, which are crucial in sectors like drug development and diagnostics. Additionally, these systems are often compatible with various ionization techniques and chromatography systems, allowing for broader applications and easier

integration into existing workflows. Moreover, triple quadrupole meets or exceeds the stringent regulations and quality standards required in many industries, which makes them a safer investment for compliance-conscious organizations.

Breakup by Application:

Pharmaceuticals

Biotechnology

Chemical and Petrochemicals

Environmental Testing

Food & Beverage Testing

Others

Pharmaceutical hold the largest share in the market

A detailed breakup and analysis of the market based on application has also been provided in the report. This includes pharmaceuticals, biotechnology, chemical and petrochemicals, environmental testing, food & beverage testing, and others. According to the report, pharmaceuticals represented the largest segment.

Pharmaceuticals are dominating the market as it is governed by strict regulatory standards. In line with this, mass spectrometry is invaluable for quality control and compliance, ensuring that pharmaceutical products meet these rigorous benchmarks. Furthermore, mass spectrometry is critical in the various stages of drug discovery, including target identification, screening, and pharmacokinetics. It provides accurate and precise data that aid researchers in the identification and quantification of compounds, thereby accelerating the time-to-market for new drugs. Besides this, mass spectrometry offers the high sensitivity and specificity required for proteomic and genomic studies, thereby driving its adoption in the pharmaceutical sector. Additionally, it is extensively used in metabolomics to identify and quantify metabolites, thus offering valuable insights into drug metabolism. Moreover, mass spectrometry is routinely used for quality control and batch-to-batch verification of raw materials, intermediates, and finished products.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest mass spectrometry market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America hosts some of the world's leading research institutions and laboratories, which contributes to a high demand for mass spectrometry equipment for advanced research. Additionally, various government agencies are offering substantial grants and funding options for research and development (R&D) activities, including those that require mass spectrometry, thus fostering a favorable environment for market growth. Besides this, North America is the headquarters for numerous companies that are market leaders in the mass spectrometry segment. Moreover, the region is at the forefront of technological innovation in advanced mass spectrometry techniques like time-of-flight (TOF) and orbitrap. In addition to this, the presence of a robust healthcare system, coupled with the focus on precision medicine and diagnostics in the region, is further boosting the market growth.

Competitive Landscape:

Top companies are developing new technologies and improving existing mass spectrometry techniques. This includes creating instruments that are faster, more sensitive, and easier to use. Furthermore, they are engaging in acquisitions and mergers to diversify their portfolio, enter into new markets, and strengthen their presence. Apart from this, leading players are partnering with research institutions,

laboratories, or other firms to share expertise and resources, which enables them to bring products to market more quickly and to tackle problems from multiple angles. Besides this, companies are also working to ensure that their products meet strict regulatory standards, both locally and globally. It involves clinical trials, rigorous testing, and obtaining necessary certifications. Moreover, major players are offering robust customer service, including training programs to educate users on how to get the most out of their mass spectrometry equipment.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Agilent Technologies Inc.

Bruker

Danaher Corporation

JEOL Ltd.

Kore Technology Ltd.

LECO Corporation

PerkinElmer Inc.

Rigaku Corporation

Shimadzu Corporation

Thermo Fisher Scientific Inc.

Waters Corporation

Recent Developments:

In June 2022, Agilent Technologies Inc. announced the launch of new quadrupole mass spectrometers at the ASMS conference on mass spectrometry and allied topics.

In June 2023, Bruker launched the timsTOF ultra mass spectrometer with transformative sensitivity.

In February 2021, JEOL announced the launch of new time-of-flight mass spectrometers with improved performance and functionality.

Key Questions Answered in This Report:

How has the global mass spectrometry market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global mass spectrometry market?

What is the impact of each driver, restraint, and opportunity on the global mass spectrometry market?

What are the key regional markets?

Which countries represent the most attractive mass spectrometry market?

What is the breakup of the market based on technology?

Which is the most attractive technology in the mass spectrometry market?

What is the breakup of the market based on application?

Which is the most attractive application in the mass spectrometry market?

What is the competitive structure of the global mass spectrometry market?

Who are the key players/companies in the global mass spectrometry market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL MASS SPECTROMETRY MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY TECHNOLOGY

- 6.1 Triple Quadrupole (Tandem)
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Quadrupole TOF (Q-TOF)
 - 6.2.1 Market Trends

- 6.2.2 Market Forecast
- 6.3 FTMS (Fourier Transform Mass Spectrometry)
 - 6.3.1 Market Trends
 - 6.3.2 Market Forecast
- 6.4 Quadrupole
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Time-of-Flight (TOF)
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast
- 6.6 ION Trap
 - 6.6.1 Market Trends
 - 6.6.2 Market Forecast
- 6.7 Others
 - 6.7.1 Market Trends
 - 6.7.2 Market Forecast

7 MARKET BREAKUP BY APPLICATION

- 7.1 Pharmaceuticals
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Biotechnology
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Chemical and Petrochemicals
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Environmental Testing
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Food & Beverage Testing
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast
- 7.6 Others
 - 7.6.1 Market Trends
 - 7.6.2 Market Forecast

8 MARKET BREAKUP BY REGION

8.1 North America

8.1.1 United States

8.1.1.1 Market Trends

8.1.1.2 Market Forecast

8.1.2 Canada

8.1.2.1 Market Trends

8.1.2.2 Market Forecast

8.2 Asia-Pacific

8.2.1 China

8.2.1.1 Market Trends

8.2.1.2 Market Forecast

8.2.2 Japan

8.2.2.1 Market Trends

8.2.2.2 Market Forecast

8.2.3 India

8.2.3.1 Market Trends

8.2.3.2 Market Forecast

8.2.4 South Korea

8.2.4.1 Market Trends

8.2.4.2 Market Forecast

8.2.5 Australia

8.2.5.1 Market Trends

8.2.5.2 Market Forecast

8.2.6 Indonesia

8.2.6.1 Market Trends

8.2.6.2 Market Forecast

8.2.7 Others

8.2.7.1 Market Trends

8.2.7.2 Market Forecast

8.3 Europe

8.3.1 Germany

8.3.1.1 Market Trends

8.3.1.2 Market Forecast

8.3.2 France

8.3.2.1 Market Trends

8.3.2.2 Market Forecast

8.3.3 United Kingdom

8.3.3.1 Market Trends

- 8.3.3.2 Market Forecast
- 8.3.4 Italy
 - 8.3.4.1 Market Trends
 - 8.3.4.2 Market Forecast
- 8.3.5 Spain
 - 8.3.5.1 Market Trends
 - 8.3.5.2 Market Forecast
- 8.3.6 Russia
 - 8.3.6.1 Market Trends
 - 8.3.6.2 Market Forecast
- 8.3.7 Others
 - 8.3.7.1 Market Trends
 - 8.3.7.2 Market Forecast
- 8.4 Latin America
 - 8.4.1 Brazil
 - 8.4.1.1 Market Trends
 - 8.4.1.2 Market Forecast
 - 8.4.2 Mexico
 - 8.4.2.1 Market Trends
 - 8.4.2.2 Market Forecast
 - 8.4.3 Others
 - 8.4.3.1 Market Trends
 - 8.4.3.2 Market Forecast
- 8.5 Middle East and Africa
 - 8.5.1 Market Trends
 - 8.5.2 Market Breakup by Country
 - 8.5.3 Market Forecast

9 SWOT ANALYSIS

- 9.1 Overview
- 9.2 Strengths
- 9.3 Weaknesses
- 9.4 Opportunities
- 9.5 Threats

10 VALUE CHAIN ANALYSIS

11 PORTERS FIVE FORCES ANALYSIS

- 11.1 Overview
- 11.2 Bargaining Power of Buyers
- 11.3 Bargaining Power of Suppliers
- 11.4 Degree of Competition
- 11.5 Threat of New Entrants
- 11.6 Threat of Substitutes

12 PRICE ANALYSIS

13 COMPETITIVE LANDSCAPE

- 13.1 Market Structure
- 13.2 Key Players
- 13.3 Profiles of Key Players
 - 13.3.1 Agilent Technologies Inc.
 - 13.3.1.1 Company Overview
 - 13.3.1.2 Product Portfolio
 - 13.3.1.3 Financials
 - 13.3.1.4 SWOT Analysis
 - 13.3.2 Bruker
 - 13.3.2.1 Company Overview
 - 13.3.2.2 Product Portfolio
 - 13.3.2.3 Financials
 - 13.3.2.4 SWOT Analysis
 - 13.3.3 Danaher Corporation
 - 13.3.3.1 Company Overview
 - 13.3.3.2 Product Portfolio
 - 13.3.3.3 Financials
 - 13.3.3.4 SWOT Analysis
 - 13.3.4 JEOL Ltd.
 - 13.3.4.1 Company Overview
 - 13.3.4.2 Product Portfolio
 - 13.3.4.3 Financials
 - 13.3.4.4 SWOT Analysis
 - 13.3.5 Kore Technology Ltd.
 - 13.3.5.1 Company Overview

- 13.3.5.2 Product Portfolio
- 13.3.6 LECO Corporation
 - 13.3.6.1 Company Overview
 - 13.3.6.2 Product Portfolio
- 13.3.7 PerkinElmer Inc.
 - 13.3.7.1 Company Overview
 - 13.3.7.2 Product Portfolio
 - 13.3.7.3 Financials
 - 13.3.7.4 SWOT Analysis
- 13.3.8 Rigaku Corporation
 - 13.3.8.1 Company Overview
 - 13.3.8.2 Product Portfolio
- 13.3.9 Shimadzu Corporation
 - 13.3.9.1 Company Overview
 - 13.3.9.2 Product Portfolio
 - 13.3.9.3 Financials
 - 13.3.9.4 SWOT Analysis
- 13.3.10 Thermo Fisher Scientific Inc.
 - 13.3.10.1 Company Overview
 - 13.3.10.2 Product Portfolio
 - 13.3.10.3 Financials
 - 13.3.10.4 SWOT Analysis
- 13.3.11 Waters Corporation
 - 13.3.11.1 Company Overview
 - 13.3.11.2 Product Portfolio
 - 13.3.11.3 Financials
 - 13.3.11.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Mass Spectrometry Market: Key Industry Highlights, 2022 and 2028

Table 2: Global: Mass Spectrometry Market Forecast: Breakup by Technology (in Million US\$), 2023-2028

Table 3: Global: Mass Spectrometry Market Forecast: Breakup by Application (in Million US\$), 2023-2028

Table 4: Global: Mass Spectrometry Market Forecast: Breakup by Region (in Million US\$), 2023-2028

Table 5: Global: Mass Spectrometry Market: Competitive Structure

Table 6: Global: Mass Spectrometry Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Mass Spectrometry Market: Major Drivers and Challenges

Figure 2: Global: Mass Spectrometry Market: Sales Value (in Billion US\$), 2017-2022

Figure 3: Global: Mass Spectrometry Market Forecast: Sales Value (in Billion US\$), 2023-2028

Figure 4: Global: Mass Spectrometry Market: Breakup by Technology (in %), 2022

Figure 5: Global: Mass Spectrometry Market: Breakup by Application (in %), 2022

Figure 6: Global: Mass Spectrometry Market: Breakup by Region (in %), 2022

Figure 7: Global: Mass Spectrometry (Triple Quadrupole- Tandem) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 8: Global: Mass Spectrometry (Triple Quadrupole- Tandem) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 9: Global: Mass Spectrometry (Quadrupole TOF- Q-TOF) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 10: Global: Mass Spectrometry (Quadrupole TOF- Q-TOF) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 11: Global: Mass Spectrometry (FTMS- Fourier Transform Mass Spectrometry) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 12: Global: Mass Spectrometry (FTMS- Fourier Transform Mass Spectrometry) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 13: Global: Mass Spectrometry (Quadrupole) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 14: Global: Mass Spectrometry (Quadrupole) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 15: Global: Mass Spectrometry (Time-of-Flight- TOF) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 16: Global: Mass Spectrometry (Time-of-Flight- TOF) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 17: Global: Mass Spectrometry (ION Trap) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 18: Global: Mass Spectrometry (ION Trap) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 19: Global: Mass Spectrometry (Others) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 20: Global: Mass Spectrometry (Others) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 21: Global: Mass Spectrometry (Pharmaceuticals) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 22: Global: Mass Spectrometry (Pharmaceuticals) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 23: Global: Mass Spectrometry (Biotechnology) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 24: Global: Mass Spectrometry (Biotechnology) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 25: Global: Mass Spectrometry (Chemical and Petrochemicals) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 26: Global: Mass Spectrometry (Chemical and Petrochemicals) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 27: Global: Mass Spectrometry (Environmental Testing) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 28: Global: Mass Spectrometry (Environmental Testing) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 29: Global: Mass Spectrometry (Food & Beverage Testing) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 30: Global: Mass Spectrometry (Food & Beverage Testing) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 31: Global: Mass Spectrometry (Others) Market: Sales Value (in Million US\$), 2017 & 2022

Figure 32: Global: Mass Spectrometry (Others) Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 33: North America: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 34: North America: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 35: United States: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 36: United States: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 37: Canada: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 38: Canada: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 39: Asia-Pacific: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 40: Asia-Pacific: Mass Spectrometry Market Forecast: Sales Value (in Million

US\$), 2023-2028

Figure 41: China: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 42: China: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 43: Japan: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 44: Japan: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 45: India: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 46: India: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 47: South Korea: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 48: South Korea: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 49: Australia: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 50: Australia: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 51: Indonesia: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 52: Indonesia: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 53: Others: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 54: Others: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 55: Europe: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 56: Europe: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 57: Germany: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 58: Germany: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 59: France: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 60: France: Mass Spectrometry Market Forecast: Sales Value (in Million US\$),

2023-2028

Figure 61: United Kingdom: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 62: United Kingdom: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 63: Italy: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 64: Italy: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 65: Spain: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 66: Spain: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 67: Russia: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 68: Russia: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 69: Others: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 70: Others: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 71: Latin America: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 72: Latin America: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 73: Brazil: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 74: Brazil: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 75: Mexico: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 76: Mexico: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 77: Others: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 78: Others: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 79: Middle East and Africa: Mass Spectrometry Market: Sales Value (in Million US\$), 2017 & 2022

Figure 80: Middle East and Africa: Mass Spectrometry Market Forecast: Sales Value (in Million US\$), 2023-2028

Figure 81: Middle East and Africa: Mass Spectrometry Market: Breakup by Country (in %), 2022

Figure 82: Global: Mass Spectrometry Industry: SWOT Analysis

Figure 83: Global: Mass Spectrometry Industry: Value Chain Analysis

Figure 84: Global: Mass Spectrometry Industry: Porter's Five Forces Analysis

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