

# Mass Spectrometry: EMEA Markets, Developments and Opportunities 2017 - 2020

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## Abstracts

Laboratory Markets Limited has completed a comprehensive market study of the global use of mass spectrometry in both clinical and research laboratory settings. This study, which estimates a current 'MS analysis' global market size of \$6.8 billion and growing to \$9.2 billion (CAGR of 9%) over the next four years, profiles the use of mass spectrometry across more than 5,400 clinical and research organisations, encompassing 88 countries. This study investigated growth in the use of mass spectrometry in terms of the number of mass spectrometry studies reported by end-users, which amounted to 17,400 studies over the period Jan 2013 to August 2016. A key goal in this study was to identify all major mass spectrometry laboratories globally, to allow estimates of market sizes in terms of sample throughput/analysis costs. Details of these organisations are provided as part of this report.

### What This Report Offers

Market Sizes (\$Billions): Across the EMEA and the top-10 countries

Market Growth (CAGR): Across the EMEA and the top-10 countries

Opportunities: Gain access to core and developing opportunities in easiest-to-access market sectors

Leading Market Sectors: Identify leading sectors in core and adjacent market areas

Methods: Profile leading, growing and emerging methods and related methodologies and applications

Applications: Identify leading, growing and emerging applications and related activities

Reduce Risks and Costs: Reduce risks/costs by accurately profiling core and leading opportunities

Targeted Marketing: Reach desired market groups by reliably profiling end-users market populations

Increase Sales Opportunities: By identifying the most promising end-users in core market areas

Emerging Markets: Identify 'small but rapidly growing' markets by accurate sector and segment profiling

Increase ROI: Through reduced costs and increased sales, by accessing more qualified prospects and opportunities

## Mass Spectrometry 2017

These new findings are the result of a detailed three-year market study by Laboratory Markets Limited, covering the period up until August 2016. These market data are combined and analysed alongside findings on mass spectrometry growth and end-user costs from a separate independent market study, carried out by Laboratory Markets Limited, involving the participation of 778 mass spectrometry end-user organisations.

Data presented on the Mass Spectrometry EMEA Markets, Developments and Opportunities 2017 - 2020 have been compiled from more than 17,400 clinical and research studies carried out by experienced mass spectrometry end-users. These end-users are major decision-makers in the selection and purchase of mass spectrometry-related products and these 'real world' market data give in-depth information on the current and future use of mass spectrometry, in addition to % growth in the numbers of mass spectrometry studies, costs, trends and opportunities.

End-user organisations by name are identified in all key sectors and segments of this study. Findings are provided as a PDF report, together with the full Mass Spectrometry

2017 market database created and compiled during this study. The data provided enables mass spectrometry suppliers to easily and rapidly identify, analyse and profile areas of the mass spectrometry market that offer the greatest opportunities to their own companies.

The extensive market database provided with the report augments the detailed market findings presented in the PDF report, allowing rapid and easy in-depth analysis across all mass spectrometry markets. These new study findings provide a wealth of market information to suppliers in the mass spectrometry field and they assist the identification of new mass spectrometry opportunities and give powerful strategic insights into new developments and applications.

Key Features 1. Enables suppliers to profile key areas of mass spectrometry markets relating to their own products and services and provides qualified prospects by end-user organisation name 2. Analyses and ranks mass spectrometry practices by global region, country, organisation type, methods, applications and others, helping suppliers to identify 'high opportunity' sectors relevant to their current mass spectrometry products and future plans in these fields, supporting targeted marketing and reducing costs and risks 3. Provides key information in growing and developing areas of the mass spectrometry market, helping suppliers focus resources on mass spectrometry growth areas, supporting new sales opportunities in important sectors 4. Helps suppliers to evolve and extend their own strategic visions, future plans and operational activities in the mass spectrometry field 5. Enables suppliers to identify, analyse and rank end-user practices and needs and build new customer relationships in leading mass spectrometry market sectors.

### Mass Spectrometry 2017 Market Study

This study provides detailed market data on the use of mass spectrometry across EMEA, covering 88 countries. Leading countries in terms of mass spectrometry use are also identified, together with top users by country state or county, city and organisation name.

Mass Spectrometry EMEA 2017 identified more than 5,400 mass spectrometry end-user laboratories, each of which are profiled across key market areas allowing the analysis of all key sectors, developments and opportunities in this field.

Organisation types using mass spectrometry are profiled as part of this study including hospitals, research institutes, universities and companies. The departments in which

these organisations use these methods are also identified.

The PDF report provides an in-depth analysis of key findings across all major sectors, and identifies key developments and opportunities, growth and end-user costs in this diverse field.

Key mass spectrometry market areas have been profiled including MS configurations (e.g. GC-MS), fragmentation methods, ionisation methods, analyzers, applications, molecules, diseases, research and clinical use, countries, country states/counties, cities, end-user organisations by name (as a source of qualified prospects) and other areas.

These findings assist suppliers in mass spectrometry fields to keep pace with end-users' laboratory activities and needs. They also offer a highly cost-effective source of marketing and sales related information and give new insights into today's evolving clinical and research mass spectrometry fields.

### Mass Spectrometry 2017 Market Database

The Mass Spectrometry EMEA 2017 database contains more than 17,400 individual records of mass spectrometry end-user organisations, covering studies reported between January 2013 and August 2016. It gives easy access to datasets and provides valuable mass spectrometry market insights.

This database is provided as an easy-to-use Excel file which can be rapidly analysed using Pivot Tables. This allows tables and graphs of all mass spectrometry market sectors or segments to be easily generated in minutes.

Pivot table analysis allows the analysis of mass spectrometry market data across all segments, allowing established mass spectrometry methods and applications to be analysed, as well as newer developments and market opportunities.

Data contained in the Mass Spectrometry 2017 EMEA database allows side-by-side comparisons of current and developing mass spectrometry practices and applications across key sectors of this market.

This database enables easy analysis of mass spectrometry practices from the methods and applications mass spectrometry end-users are running, to more powerful analyses of relationships in the market, offering market predictions and trend analysis.

The market data presented in Mass Spectrometry EMEA 2017 provides a valuable source of qualified sales prospects, based on the current and developing use of mass spectrometry across multiple organisations and sectors.

## Key Goals

Identify sufficient numbers of published studies on the use of mass spectrometry to enable Laboratory Markets to substantially identify all major mass spectrometry laboratories globally, as a basis for calculating market sizes and for accurately profiling sectors, growth and opportunities in this field

Enable suppliers to profile key areas of mass spectrometry markets relevant to their own products and services and provide relevant qualified prospects by end-user organisation name

Analyse and rank mass spectrometry practices by country, end-user departments, countries, organisation names, organisation types (hospitals, clinics, medical centres etc), departments, mass spectrometry methods, Mass Spectrometry applications and other areas, assisting suppliers to identify sectors relevant to their current products and future plans in these fields, supporting targeted marketing and reducing costs and risks

Provide key information on growing and developing areas of the mass spectrometry market, helping suppliers to focus their resources on these areas, supporting new sales opportunities in leading market sectors

Help suppliers to evolve and extend their own strategic visions, future plans and operational activities in mass spectrometry

Enable suppliers to identify, analyse and rank end-user practices and needs and build new customer relationships in leading mass spectrometry market sectors

Provide in-depth market data that suppliers can analyse alongside their own market information and insights into specific areas of the market, to assist in the identification of new market opportunities and reduce risk in important areas of commercial decision-making

## Mass Spectrometry Market Study

### 1. Mass Spectrometry Laboratories

This market study covers more than [number of laboratories] mass spectrometry laboratories globally, which are identified by organisation name and department, country and in most cases, by city. The top mass spectrometry end-users (based on the numbers of reported mass spectrometry studies) can be identified, as well as the 'top growth' areas based on the numbers of mass spectrometry studies. These data enable suppliers to identify sales prospects and opportunities based on current use and market developments and trends. Findings on individual mass spectrometry laboratories can be segmented across all areas of the study.

### 2. Mass Spectrometer Configurations

The use of specific mass spectrometry configurations were investigated in this study and these can be segmented across all other areas of the study including applications, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

The mass spectrometry configurations studied included AMS, ATOFMS, CE-MS, DART MS, EA IRMS, EC-MS, ESI FTICR, ESI MS-MS, ESI-Orbitrap, FAIMS-MS, GC-GC MS, GC-HRMS, GC-ICP-MS, GC-IMS, GC-IRMS, GC-MS, GC-QTOF, GC-TOF, IC-ICP-MS, ICP-DOFMS, ICP-MS, IMS-MS, IRMS, LC LC-MS, LC MALDI-TOF/TOF, LC MS, LC Orbitrap, LC TOF, LC-DAD-HRMS, LC-FTICR, LC-HRMS, LC-MALDI-TOF/TOF, LC-MS, LC-Orbitrap, LC-qTOF MS, LC-TOF, LDI MS, MALDI FTICR, MALDI Imaging MS, MALDI Tandem MS, MALDI TOF, MALDI-QIT-TOF, MS-MS, PTR MS, PTR-TOF-MS, Py-GC/MS, RIMS, SELDI-TOF, SFC-MS, SIFT-MS, SIMS, TOF MS, TOF-TOF, TPD MS, and UHPLC-QqQ.

### 3. Mass Spectrometry Applications

The use of specific mass spectrometry applications were investigated in this study and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names,

organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

The mass spectrometry configurations studied included Agriculture, Air analysis, Animal health, Apoptosis, Aquatic, Archaeology, Astrobiology, Bacteria analysis, Biofilm analysis, Biomarkers, Bioprocesses, Carbohydrate, Catalysis, Cell Cycle, Cell Markers, Cell Phenotyping, Cell signalling, Cell Sorting, Cell Surface Antigens, Chemical Ecology, Chemical Kinetics, Chemical Structure, Chemical Synthesis, Chlorophyll, Climate, Clinical Diagnostics, Clinical Research, Clinical Testing, Cluster of Differentiation, Contraband, Cytokine, Cytology, Defense, Diagnostics, diglycerides, DNA, DNA sequencing, Drinks, Drugs, Energy, Environment, Epidemiology, Fats, Flavours, Food, Forensics, Fossil fuels, Fragrances, Fungi, Gene Expression, Genomics, Geochemistry, Geology, Glycomics, Glycoprotein, Hormones Identify a Protein, Imaging, Inflammatory Markers, Insects, Isotope ratios, Lipids, Macromolecules, Marine, Materials Science, Medicine, Metabolism, Mining, Molecular Biology, Molecular Dynamics, Mycology, Narcotics, Neurochemistry, Nucleotides, Oils, Peptides, Petrochemicals, Physiology, Plants, Polymers, Post Translational Modification, Prokaryotes, Protein Folding, Proteins, Quality Control, Radioisotopes, Reaction Mechanisms, Reactive Oxygen Species, Residues, Security, Semiconductors, Small molecules, Steroid, Structural Biology, Sugars, Tobacco, Toxicology, Veterinary, and Warfare.

#### 4. Ionisation Methods

The use of specific mass spectrometry ionisation methods were investigated in this study and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

The mass spectrometry ionisation methods studied included Atmospheric Pressure Chemical Ionisation, Atmospheric Pressure Photoionisation, Chemical Ionisation, Corona Discharge Ionisation, Desorption electrospray Ionisation, Desorption/Ionisation on Silicon, Direct Analysis in Real Time, Electron Impact, Electron Ionisation, Electrospray Ionisation, Fast Atom Bombardment, Field Desorption, Glow Discharge, Inductively Coupled Plasma, Laser Desorption Ionisation, Laser Ionisation, Low

Temperature Plasma Ionisation, Photoionisation, Plasma Desorption, Proton Transfer Reaction, Q Exactive, Secondary Ion Mass Spectrometry, Secondary Ionization, Selected Ion Flow Tube, Sputtering, Thermal Ionisation, Thermospray Ionization and Turbo ionization.

## 5. Fragmentation Methods

The use of specific mass spectrometry fragmentation methods were investigated in this study and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

The mass spectrometry fragmentation methods studied included Charge Remote Fragmentation, Collision Induced Dissociation, Electron Capture Dissociation, Electron Detachment Dissociation, Electron Transfer Dissociation, Higher energy C-trap Dissociation, In Source Fragmentation, Infrared Multiphoton Dissociation, Negative Chemical Ionization, Ozone-Induced Dissociation, Photodissociation, Post Source Decay, Proton Transfer Reaction and Surface Induced Dissociation.

## 6. Analyzers

The use of specific mass spectrometry analyzers were investigated in this study and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

The mass spectrometry analyzers studied included Ion Cyclotron Resonance, Magnetic Sector, Quadrupole Ion Traps, Quadrupole Mass, Quadrupole Mass Analyser, Quadrupole Mass Spectrometers and Time of Flight.

## 7. Clinical and Research Use

All mass spectrometry studies cited in this report were reviewed to establish the clinical (e.g. involving patients or volunteers) or research use of this technique. These these



can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

## 8. Molecule Types

The use of mass spectrometry to analyse specific molecule types were investigated in this study and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

The molecule stypes studied included Cell proteins, Diglycerides, Disaccharides, Drugs, Enzyme, Fats, Hormones, Intact Virus, Lipids, Membrane proteins, Metabolites, Nucleotides, Oils, Peptide, Polysaccharides, Protein, Small Molecule, Steroids, Sugars and Viral Proteins.

## 9. Countries

The use of mass spectrometry was investigated by country and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, ountries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

## 10. Organisation Types

The use of mass spectrometry was analysed across specific organisation types (hospitals, companies, research institutes, medical and research centers, universities, veterinary organisations etc) and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties,

organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

## 11. Departments

The use of mass spectrometry was analysed across specific departments and these can be segmented across all other areas of the study including MS configurations, fragmentation methods, ionisation methods, analyzers, clinical and research use, molecule types, countries, states or counties, organisation names, organisation types (companies, hospitals, research institutes, universities, veterinary organisations etc) and departments. In all cases, the organisations reporting the use of these specific methods are identified by name.

## 12. Growth, Throughputs and Costs

This study included an analysis of growth in terms of the numbers of studies across key areas of the mass spectrometry market, including across the top 20 countries. The numbers of mass spectrometry laboratories globally and by region were also estimated and these findings, when combined with sample throughputs and per-sample costs have allowed estimates market sizes in terms of sample processing, but excluding instrumentation.

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