

# Analytical Standards Market - Company Evaluation Report, 2024

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## Abstracts

The Analytical Standards Companies Quadrant is a comprehensive industry analysis that provides valuable insights into the global market for Analytical Standards. This quadrant offers a detailed evaluation of key market players, technological advancements, product innovations, and industry trends. MarketsandMarkets 360 Quadrants evaluated over 140 companies, of which the Top 15 Analytical Standards Companies were categorized and recognized as the quadrant leaders.

Analytical standards are highly pure reference materials used to calibrate instruments, validate testing methods, and perform quality control in analytical laboratories. These standards provide a precise, known concentration or purity, acting as a benchmark against which unknown samples can be accurately measured. They are indispensable in ensuring that test results are reliable, reproducible, and comparable across different laboratories and over time. Their use is critical in diverse fields such as pharmaceuticals, food safety, environmental monitoring, and clinical diagnostics, where accuracy is non-negotiable.

The market for analytical standards is driven by increasingly stringent regulatory frameworks across multiple industries. Government bodies like the FDA and EPA mandate rigorous testing for products like pharmaceuticals, food, and drinking water, creating a constant demand for certified reference materials. The growth of the life sciences and biotechnology sectors, coupled with rising public concern for food safety and environmental pollution, further fuels the need for precise analytical testing. Additionally, globalization requires harmonized standards to ensure product quality and facilitate international trade.

However, the market faces several challenges that can impede its growth. The

production and certification of high-purity analytical standards is a complex and expensive process, resulting in high product costs for end-users. Many standards have a limited shelf life and require specific storage conditions, adding to logistical complexity and operational expenses. A lack of globally harmonized regulatory guidelines can create confusion and trade barriers. The development of standards for new and emerging contaminants or novel drug compounds also presents an ongoing technical challenge.

The 360 Quadrant maps the Analytical Standards companies based on criteria such as revenue, geographic presence, growth strategies, investments, and sales strategies for the market presence of the Analytical Standards quadrant. The top criteria for product footprint evaluation included Technique [Chromatography (Ion Chromatography, Gas Chromatography, Liquid Chromatography, Thin-layer Chromatography, Other Chromatography Standards), Spectroscopy (Atomic Absorption Spectroscopy, Mass Spectroscopy, IR Spectroscopy, Nuclear Magnetic Resonance Spectroscopy, X-Ray Fluorescence/Diffraction Spectroscopy [XRF/XRD], UV/Visible Spectroscopy, Other Spectroscopy Standards), Titrimetry, Physical Property Testing (Viscosity Testing, Sieve Calibration & Particle Size Testing, Colour Reference testing, Other Physical Property Testing Standards)], Application [Food & Beverage Standards (Flavor & Fragrance Standards, Carbohydrate Standards, Peptide/Amino Acid Standards, Food Additive Standards, Fatty Acid/Lipid/Fame Standards, GMO [genetically modified organisms] Standards, Mycotoxin Standards, Pesticide Standards, Other Food & Beverage Standards), Forensic Standards (Drugs-of-Abuse Standards, Doping Standards, Other Forensic Standards), Veterinary Drug Standards (Antibiotic Standards, Hormone Standards), Petrochemical Standards (Gasoline, Diesel, and Petroleum Standards, Biofuel Standards), Environmental Standards (Pesticide Standards, PFAS Testing Standards, Microplastic Testing Standards, Volatile Standards, Semi-volatile Standards, Flame Retardant Standards, Aroclor/PCB and Dioxin Standards, Other Environmental Standards), Pharmaceutical & Life Science Standards (Cosmetic Standards, Herbal Drug/Phytopharmaceutical Standards, Pharmaceutical Secondary Standards, Pharmaceutical Impurity Reference Standards, Pharmacopoeia Standards, Fluorescent Microparticle Standards), Clinical Diagnostics Standards (Hormone Testing Standards, Vitamin Standards, Biomarker Standards, Clinical Toxicology Standards, Other Clinical Diagnostics Standards)], Category (Organic Standards, Inorganic Standards), Methodology (Bioanalytical Testing, Stability Testing, Raw Material Testing, Dissolution Testing, Other Methodologies).

Key Players:

Major vendors in the Analytical Standards market are Merck KGaA (Germany), Agilent Technologies, Inc. (US), Waters Corporation (US), PerkinElmer (US), LGC Limited (UK), The United States Pharmacopeial Convention (US), Restek Corporation (US), SPEX CertiPrep (US), AccuStandard (US), RICCA Chemical Company (US), Cayman Chemical (US), Thermo Fisher Scientific Inc. (US), Mallinckrodt (UK), GFS Chemicals, Inc. (US), and Chiron AS (Norway). The key strategies major vendors implement in the Analytical Standards market are partnerships, collaborations, product launches, and product enhancements.

### Merck KGaA

Merck KGaA, of Darmstadt, Germany, is a leading science and technology company with major divisions in Life Science, Healthcare, and Electronics. Its Life Science business is a critical partner to the global biopharma industry, providing an extensive portfolio from lab water systems to advanced bioprocessing technologies. Strategically, Merck is focused on capturing growth from new modalities like cell and gene therapies, expanding its manufacturing capacity for biologics, and driving digitalization in the lab. This solidifies its indispensable role in the drug discovery, development, and manufacturing ecosystem, ensuring its strong market position.

### Agilent Technologies, Inc.

Agilent Technologies is a global leader in laboratory analytics, providing high-precision instruments, software, and consumables to the life sciences, diagnostics, and applied chemical markets. Its portfolio is built on core platforms like chromatography and mass spectrometry, which are essential for quality control and research. Strategically, Agilent is deepening its focus on the high-growth biopharma and diagnostics sectors, offering complete workflow solutions for cell analysis, genomics, and cancer diagnostics. By enabling scientific and clinical breakthroughs with its trusted technologies, Agilent maintains its status as a cornerstone of the modern analytical laboratory.

### LGC Limited

LGC Limited is a global life sciences tools company dedicated to enabling "Science for a Safer World." It holds a leading market position as a provider of critical measurement tools, including reference materials, proficiency testing schemes, and genomics reagents. Through a strategy of targeted acquisitions and integration, LGC offers a comprehensive portfolio supporting sectors from food safety to clinical diagnostics and pharmaceutical research. By supplying the essential components and standards that

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