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Mass Spectrometry Market by Product (Instrument (Triple Quadrupole, Q-TOF, FTMS, Quadrupole, TOF), Software & Services), Sample (LC-MS, GC-MS), Application (Omics, Drug Discovery, Food, Environmental), End User (Pharma, Biotech) - Global Forecasts to 2030

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Abstracts

The global mass spectrometry market is estimated to reach USD 9.62 billion by 2030 from USD 6.33 billion in 2024, at a CAGR of 7.2% during the forecast period.

The market's growth can be attributed to mass spectrometers' applications in environmental sample testing of analytes like PFAS and microplastics in environmental testing which are expected to increase. The pharmaceutical industry's allocation of larger budgets for research and development and government regulation on drug safety will increase demand for mass spectrometers. Increasing investments in energy exploration and climate studies will stimulate demand for mass spectrometers. Also, the sensitive qualitative and quantitative mandates for food and beverage testing are expected to increase the demand in the mass spectrometry market.

“In terms of product, the instruments segment accounted the largest share in the global mass spectrometry market for the year 2023”

Based on the product, the mass spectrometry is segmented into instruments and software & services. The hybrid mass spectrometry segment accounts for the largest share of the mass spectrometry market. Hybrid mass spectrometers exhibit, rapid and high-resolution testing abilities with more accurate and precise results. Hybrid mass spectrometers incorporate at least two component mass analyzers of different types

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arranged in sequence from the ion source to the ion detector. This greatly increases their sensitivity, accuracy, resolution, and efficiency, which drives their adoption on a significant level when compared to single mass analyzers. Moreover, analyses performed with hybrid mass spectrometers yield large volumes of complex data at high speed and resolution and result in accurate and better analysis, companies tend to provide software to manage and analyze such data sets.

The growth of the mass spectrometry instruments market will primarily be driven by the procedural benefits offered by mass spectrometers as they can be used for different applications, such as classifying unknown substances by molecular weight measurement, measuring known compounds, and determining the structure and chemical properties of molecules.

'In terms of sample preparation technique, the LC-MS segment accounted for the largest share during the forecast period”

LC-MS is one of the most commonly used analytical techniques in various sectors for the quantitation and identification of unknowns from a variety of complex samples. The use of LC-MS has expanded over the years as it offers both selectivity and specificity in analysis. With advances in mass spectrometry, the sensitivity and accuracy of this technique have further increased, allowing for the detection and identification of low-level analytes in complex sample matrices. Liquid chromatography (LC) is a technique widely used to separate compounds from a sample before analysis and is frequently coupled to mass spectrometry.

The advent of new applications of LC-MS for testing emerging contaminants from third-party testing service providers and labs has increased in the last three years. All these conditions have helped LC-MS to acquire a major share in the mass spectrometry market.

“In terms of applications, the OMICS research segment registered the fastest growth during the forecast period”

Due to the high sensitivity and selection of mass spectrometry, it has also found applications in genomics research to characterize single nucleotide polymorphisms and short tandem repeats. In metabolomics, mass spectrometry has also shown promising results in diabetes studies, as it helps in distinguishing specific changes in the serum profile of metabolites extracted from healthy people and those with type 2 diabetes mellitus. It is also effective in newborn screening, leading to a portfolio of multiplexing

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assays for congenital metabolic errors.

The OMICS research segment is expected to witness significant growth during the forecast period. The biopharmaceutical and biotechnology industries have facilitated the advancement of diagnostics & biomarker identification applications in the R&D sector, leading to its significant growth and dominance in the industry in the upcoming years.

“In terms of end users, the pharmaceutical companies acquired the largest share of the global mass spectrometry market.”

Several regulations for pharmaceutical manufacturing sites have been implemented that confines the metal residues and endotoxins in pharmaceutical products to certain limits, this is quantified on parameters for active pharmaceutical ingredients (API) in production volume. These constrictions have prompted pharmaceutical companies to procure and utilize mass spectrometers in their QC departments. Also, the anticipated revenue growth of this segment during the forecast period is attributed to the rapid expansion of the pharmaceutical industry worldwide and the technological advancements in the pharmaceutical sectors.

All these factors have favored the adoption mass spectrometry technique more to deliver quality end products.

“The market in the North America region is expected to hold significant market share for mass spectrometry in 2023.”

The mass spectrometry market covers five key geographies—North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa. The market in the North America region is expected to hold significant market share for mass spectrometry in 2023. The growth of the mass spectrometry market in this region can be attributed to the increasing investments in pharmaceutical R&D and government funding for R&D activities.

A breakdown of the primary participants referred to for this report is provided below:

By Company Type: Tier 1 -35%, Tier 2– 45%, and Tier 3– 20%

By Designation: C-level- 35%, Directors–25%, and Others–40%

By Region: North America–40%, Europe–30%, Asia Pacific–20%, Latin

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America–5%, and the Middle East & Africa–3%

The key players profiled in the mass spectrometry market are Agilent Technologies, Inc. (US) Thermo Fisher Scientific, Inc. (US), Danaher Corporation (US), Waters Corporation (US), Bruker Corporation (US), Shimadzu Corporation (Japan), PerkinElmer, Inc. (US), Jeol Ltd (Japan), Jasco (Japan) Teledyne Technologies Incorporated (US), MKS Instruments (US), Ametek, Inc (US), Hitachi High-Tech Corporation (Japan)

Research Coverage

The research report examines the mass spectrometry market by product, sample preparation technique, application, end-users, and geography. This research covers factors that are driving market expansion, analyzes prospects and parameters faced by industries in the present time, and provides specifics on the competitive landscape considering market leaders and small and medium enterprises. This research also estimates the revenue of different market segments by considering five regions along with micro-market analysis.

Rationale to Buy the Report

The research report will help smaller and newer businesses as well as established ones understand the state of the market, which will help them increase their market share. Businesses that purchase the study may choose to employ one or more of the tactics listed below to increase their market presence.

This report provides insightful data on the following pointers:

Market Penetration: In-depth coverage of product portfolios offered by the top players in the mass spectrometry market.

Product Development/Innovation: In-depth coverage of product portfolios offered by the top players in the mass spectrometry market.

Market Development: Insightful data on profitable developing areas.

Market Diversification: Details about recent developments and advancements in the mass spectrometry market.

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Competitive Assessment: Extensive assessment of the products, growth tactics, revenue projections, and market categories of the top competitors.

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