

Process Analyzers (Liquid & Gas), Gas Chromatography, and Spectroscopy Market by Industry (Oil & Gas, Petrochemical, Pharmaceutical, Water & Wastewater, Food & Beverage, Pulp & Paper, Metal & Mining, and Others), And Geography - Global Forecast to 2020

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Abstracts

The global process analyzers (liquid & gas) market is expected to reach USD 4.98 billion by 2020, at an estimated CAGR of 5.50% between 2015 and 2020. The major factors contributing to the growth of this market include the increasing usage of a wide range of analyzers in various process industries to monitor various hazardous liquids and gases. The gas chromatography market is estimated to grow to USD 3.90 billion, whereas the spectroscopy market is projected to reach USD 22.04 billion by 2020, at a CAGR of 8.60% and 8.72%, respectively, during the forecast period. The growth in the gas chromatography market can be attributed to the increasing adoption of this technology in the petrochemical industries for oil extraction and refinery-related activities. On the other hand, the growth of the spectroscopy market is majorly driven by the adoption of various spectroscopy techniques such as molecular, atomic, and mass spectrometry in the process industries.

“The process analyzers, gas chromatography, and spectroscopy markets for the pharmaceutical industry expected to grow rapidly during the forecast period”

The process analyzers, gas chromatography, and spectroscopy markets for the pharmaceutical industry held the largest share of the global process (liquid & gas) analyzers, gas chromatography, and spectroscopy markets in 2014 and this trend is expected to continue during the forecast period. This growth is majorly driven by the

stringent drug regulations framed by the international regulatory bodies such as U.S. Food and Drug Administration, World Health Organization, and European Medicines Agency for the manufacturing, processing, and distribution of pharmaceutical products.

“APAC to be the fastest growing market during the forecast period”

The global process analyzers, gas chromatography, and spectroscopy markets in the Americas held the largest share in 2014; however, the markets in APAC are expected to exhibit the highest growth rate during the forecast period. The major factors contributing to the growth of these markets include high investments by major players in various process industries. The markets in the Americas and Europe are already mature; hence, the well-established players are focusing on APAC to market their products and services. With the increasing investments in the process industries, the demand for liquid and gas analyzers, gas chromatographs, and spectrographs is also increasing.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews have been conducted with key people in the market. The break-up of profiles of primary participants is given below:

By Company Type: Tier 1%–55 %, Tier 2%–20% and Tier 3%–25%

By Designation: C-level – 60%, Director level – 25%, Others – 15%

By Region: North America – 10%, Europe – 20%, APAC – 40%, RoW – 30%

The prominent players profiled in this report are:

1. ABB Ltd. (Switzerland)
2. AMETEK Process Instruments (U.S.)
3. Applied Analytics, Inc. (U.S.)
4. Endress+Hauser AG (Switzerland)
5. The Emerson Electric Company (U.S.)
6. GE Analytical Instruments (U.S.)
7. Mettler-Toledo International Inc. (U.S.)
8. PAC L.P. (U.S.)
9. Siemens AG (Germany)

10. Thermo Fisher Scientific, Inc. (U.S.)
11. Yokogawa Electric Corp. (Japan)

The report will help the market leaders/new entrants in this market in the following ways:

1. This report segments the process analyzers (liquid & gas), gas chromatography, and spectroscopy markets comprehensively and provides the closest approximations of the revenues for the overall market and the subsegments across different verticals and regions.
2. The report helps stakeholders to understand the pulse of the market and provides them information on key market drivers, restraints, challenges, and opportunities.
3. This report will help stakeholders to better understand their competitors and gain more insights to enhance their position in the business. The competitive landscape section includes competitor ecosystem, new product developments, partnerships, and mergers & acquisitions.

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About

The process liquid analyzer, gas analyzer, and gas chromatograph market is an instrument used for determining the chemical composition of substances involved in a chemical process directly, or measuring the physical parameters indicative of the composition. The process liquid analyzer, gas analyzer, and gas chromatograph industry has been in existence for several years and it comprises the analytical chemistry, process chemistry, and multivariate data analysis, among others. The need for an analyzer is generated by the need to monitor, measure, and analyze the sample or the process. Process liquid analyzers, gas analyzers, and gas chromatographs have found applications in various sectors such as chemical, mining, food and beverage, medical & healthcare, and power and utility.

The report deals with all the driving factors, restraints, and opportunities with respect to the process liquid analyzer, gas analyzer, and gas chromatograph market, which are helpful in identifying its trends and key success factors. The report profiles the major players in the global process liquid analyzer, gas analyzer, and gas chromatograph market. Some of these players are Siemens AG (Germany), ABB Ltd. (Switzerland), Emerson Process Management (U.S.), Thermo Fisher Scientific (U.S.), and Yokogawa Electric Corporation (Japan). This report provides a competitive landscape of the key players, which covers the key growth strategies. The report also formulates the entire value chain, along with the industry trends in the process liquid analyzer, gas analyzer, and gas chromatograph market, with an emphasis on market timelines, technology roadmaps, and product type life cycle analysis.

The need for a mechanism to enable the early detection of the presence of hazardous chemicals in air or water as well as addressing the concerns of emission control and energy conservation have resulted in an increased demand of process liquid analyzers, gas analyzers, and gas chromatographs. Some of the other drivers for the process liquid analyzer, gas analyzer, and gas chromatograph market are the increasing demand for oil and gas, the stringent government policies for operational health and safety, and the rise in demand for Continuous Emission Monitoring Systems (CEMS). Some of the restraints for this industry could be the requirement of a large capital to fund the initial research, the need for innovative product types, and a stabilized market in the developed countries .

The market for process liquid analyzers, gas analyzers, and gas chromatographs has been segmented into four segments, namely- product type, service, application, and

geography. The product types segment is further segregated into gas analyzer, liquid analyzer, gas chromatography, and spectroscopy. The gas analyzer sub segment is further divided into Oxygen, Moisture, Carbon dioxide, and Hydrogen Sulfide. The liquid analyzer sub segment is divided into pH/ORP, conductivity, dissolved oxygen, chlorine, colorimetric, Titro, TOC & COD analyzer, turbidity, near infrared, and MLSS analyzer. The spectroscopy market is segmented into laser based, Raman, UV-Vis, Nuclear Magnetic Resonance, Electron Spin Resonance, Atomic, and mass hyphenated. The Gas chromatography segment has been divided into process gas chromatographs and BTU analyzers.

This report focuses on giving an insight view of the complete process analyzer and gas chromatograph market, with detailed market segmentations, combined with the qualitative analysis of each and every aspect of the market, which has been classified based on component, platform, application, and geography. All the numbers, both, in terms of the value and volume, at every level of detail, have been projected till 2020, to give a glimpse of the market potential in terms of value.

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