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Protein Characterization and Identification Market by Instruments (Chromatography, Electrophoresis, Mass Spectrometry), Consumables & Services, Application (Clinical Diagnosis, Drug Discovery), End User (Pharma, Biotech, CROs) - Global Forecast to 2026

https://marketpublishers.com/r/P1B430983C2EN.html
Date: September 2021
Pages: 334
Price: US$ 4,950.00 (Single User License)
ID: P1B430983C2EN

Abstracts

The protein characterization and identification market is projected to reach USD 23.9 billion by 2026 from USD 12.6 billion in 2021, at a CAGR of 13.7% during the forecast period, owing togrowing acceptance of personalized medicine, increased expenditure in R&D for drug discovery and development, technological advancements, and growth in proteomics research.

“By product & service, theconsumables segment accountedfor the largest share of the protein characterization and identificationmarket”

The protein characterization and identificationmarket by product & service is categorized into consumables, instruments, and services. The consumables segment is further divided into immunoassay consumables, mass spectrometry consumables, chromatography consumables, electrophoresis consumables, and other consumables. The instruments segment is further dividedmass spectrometry instrument, chromatography instrument, electrophoresis instrument, label-free detection instrument, spectroscopy instrument, and other instruments. The services segment is further divided based on the applications such as drug discovery & development, clinical diagnosis, and other applications. The consumables segment dominated the market in 2020. The large share of this segment can be attributed torisingavailability of a wide range of reagents and the need for reliable, specific, and rapid detection of diseases at the early stages.

"Asia Pacific: The fastest-growing region in the protein characterization and identificationmarket."

The Asia Pacific market is projected to grow at the highest CAGR during the forecast period, mainly due to rising prevalence of chronic diseases, geographical expansion by prominent market players, and increasing demand for high-quality analytical tools for protein analysis.

"North America: the largest share of the protein characterization and identificationmarket"

North America accounted for the largest share of the protein characterization and identificationmarket. Availability of funds for innovative technologies from government organizations, growing number of agreements and collaborations among large companies, and increasing R&D investments in proteomics researchare the major factors driving the market growth in the region.

Breakdown of primaries

The study contains insights from various industry experts, ranging from component suppliers to Tier 1 companies and OEMs. The break-up of the primaries is as follows:

By Respondent– Supply Side- 70%, Demand Side- 30%

By Designation— Executives- 25%, CXOs&Directors--30%, Managers - 45%

By Region— North America - 40%, Europe - 25%, APAC – 20%, LATAM- 10%, MEA- 5%

The protein characterization and identificationmarket is dominated by a few globally established players such as including Thermo Fisher Scientific (US), Merck KGaA (Germany), Danaher Corporation (US), Agilent Technologies (US), Waters Corporation (US), Creative Proteomics (US), Rigaku Corporation (Japan), Analytik Jena (Germany), VProteomics (India), Promega Corporation (US), Sartorius AG (Germany), HORIBA Ltd. (Japan), QIAGEN N.V. (Netherlands), Cleaver Scientific (UK), JEOL Ltd. (Japan), MS Bioworks (US), MassTech Inc. (US), Advion, Inc. (US), and SERVA Electrophoresis GmbH (Germany).

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Research Coverage:

The report segments the protein characterization and identificationmarket based on region (North America, Europe, Asia Pacific, Latin America and Middle East & Africa), product & service(consumables (immunoassay consumables, mass spectrometry consumables, chromatography consumables, electrophoresis consumables, and other consumables), instruments (mass spectrometry instrument, chromatography instrument, electrophoresis instrument, label-free detection instrument, spectroscopy instrument, and other instruments), and services (drug discovery & development, clinical diagnosis, and other applications), application (drug discovery & development, clinical diagnosis, and other applications), and end user (pharmaceutical & biotechnology companies, academic research institutes, contract research organization (CROs) and other end users).

The report also provides a comprehensive review of market drivers, challenges, and opportunities in the protein characterization and identificationmarket.

Key Benefits of Buying the Report:

The report will help the leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall market and the sub-segments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the protein characterization and identificationmarket and provides them information on key market drivers, challenges, and opportunities.

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*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

12 APPENDIX

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About

Protein characterization refers to the characterization of proteins, based on protein size, shape, and sequence concentration as well as physiochemical properties such as isoelectric point, molecular weight, relative hydrophobicity, and spectral analysis.

> This market study covers various protein characterization and identification products (instruments, consumables, and services) for arriving at the protein characterization and identification market size from 2012 to 2019
>
> These products primarily find applications in clinical diagnosis and drug discovery and development. These products also find applications in agricultural and environmental research.

This research study involved the usage of extensive secondary sources, directories, and databases such as Hoovers, Bloomberg BusinessWeek, Factiva, and OneSource, to identify and collect information useful for this technical, market-oriented, and commercial study of the global protein characterization and identification market. The primary sources are mainly several industry experts from core and related industries and preferred suppliers, manufacturers, distributors, service providers, reimbursement providers, technology developers, alliances, standards and certification organizations from companies, and organizations related to all segments of this industry's value chain. In-depth interviews were conducted from various primary respondents, which include key industry participants, subject matter experts, C-level executives of key market players, and industry consultants, to obtain and verify critical qualitative and quantitative information as well as to assess future prospects. The following illustrative figure shows the market research methodology applied in making this report on the global protein characterization and identification market.

In the secondary research process, various secondary sources were referred to identify and collect information for this study. The secondary sources include annual reports, press releases and investor presentations of companies, white papers, journals, certified publications, articles from recognized authors, gold standard and silver standard websites, disease-specific organizations, directories, and databases.

Secondary research was mainly used to obtain key information about the industry's supply chain, market's monetary chain, total pool of key players, market classification

and segmentation according to industry trends to the bottom-most level, geographical markets, and key developments from both market- and technology-oriented perspectives.

In the primary research process, various primary sources from both supply and demand sides were interviewed to obtain qualitative and quantitative information for this report. The primary sources from the supply side include industry experts such as CEOs, vice presidents, marketing directors, technology and innovation directors, and related key executives from various key companies and organizations operating in the protein characterization and identification market. The primary sources from the demand side include academicians, laboratory technicians and technologists, purchase managers in biotechnology and pharmaceutical companies, and researchers.

After the complete market engineering (which includes calculations for market statistics, market crackdown, market size estimations, market forecasting, and data triangulation) extensive primary research was conducted to gather information and to verify and validate the critical numbers arrived at.

Primary research was also conducted to identify the segmentation types; industry trends; Porter's analysis; key players; competitive landscape of protein characterization and identification products supplied by different types of market players; and key market dynamics such as drivers, restraints, opportunities, industry trends, and key player strategies.

In the complete market engineering process both top-down and bottom-up approaches were extensively used along with several data triangulation methods to perform market estimation and market forecasting for the overall market segments and subsegments listed in this report. Extensive qualitative and quantitative analysis was performed on the complete market engineering process to list key information/insights throughout the report.

Our forecast of the size of the global protein characterization and identification market for 2019 is the product of a bottom-up model constructed by integrating inputs on the key drivers and trends of demand outlined in the main report. In chapters 4 and 5, we have outlined the key drivers and trends that will shape the global protein characterization and identification market. The key drivers that are expected to have a high impact on this market are increasing public and private sector funding for R&D and increasing trend of patent application in biotechnology. Increasing government funding is expected to have a direct impact on the demand of protein characterization and

identification products; whereas, technology conversion and commercialization in life science research through increasing trend of patent applications in biotechnology is expected to have an indirect impact on the demand of protein characterization and identification products.

This section provides an overview of the modeling approach adopted and the data sources that were used as inputs for each of the two demand drivers. This section also describes how the data was integrated to develop an overall view of the global protein characterization and identification market by 2019.

The following sections outline the two points mentioned below:

Growth in R&D expenditure: Data sources were used to understand the increase in research and development across the globe and how this will impact the global spending and demand for protein characterization and identification products

Increasing number of biotechnology patents: Data sources were used to understand the increasing patents in biotechnology globally and how it would impact the global demand for the protein characterization and identification market

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