

Protein Crystallization & Crystallography Market by Technology (NMR, X-Ray Crystallography), Product & Service (Instrument (Liquid Handling (Automated)), Consumable (Reagent, Microplate) End User, and Region - Global Forecast to 2025

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Abstracts

“The increasing adoption of protein-based therapeutics is expected to drive the growth of the protein crystallization and crystallography market.”

The global protein crystallization and crystallography market is estimated to grow from USD 1.1 billion in 2020 to USD 1.7 billion by 2025, at a CAGR of 8.9% during the forecast period. The major factors driving the growth of this market include the increasing adoption of protein therapeutics, technological advancements in protein crystallization instruments and consumables, and the increasing focus on miniaturization.

“Consumables segment accounted for the largest share of the protein crystallization and crystallography market, by product and service, in 2019.”

Based on product and service, the protein crystallization and crystallography market is segmented into consumables, instruments, and software and services. In 2019, the consumables segment accounted for the largest share of the protein crystallization and crystallography market. This can be attributed to the large number of reagent kits and microplates used in proteomics research. The consumables segment is further divided into reagents kits/screens, microplates, crystal mounts and loops, and other consumables. In 2019, the microplates segment accounted for the largest share of the protein crystallization and crystallography consumables market.

“Cryo-electron microscopy segment to grow at the highest CAGR in the protein crystallization and crystallography market during the forecast period”

Based on technology, the protein crystallization and crystallography market is segmented into X-ray crystallography, NMR spectroscopy, cryo-electron microscopy, and small-angle X-ray scattering (SAXS). The cryo-electron microscopy segment is projected to register the highest CAGR in the forecast period. Cryo-electron microscopy is an emerging technology where protein samples are studied at cryogenic temperatures (the temperature of liquid nitrogen). As these studies are carried out at cryogenic temperatures, they offer various advantages such as reduced thermal vibrations and greater resilience to X-rays, allowing the crystal to survive for longer durations in X-ray beams.

“Pharmaceutical companies are the largest end users of protein crystallization and crystallography products.”

Based on end user, the protein crystallization and crystallography market is segmented into pharmaceutical companies, biotechnology companies, and research and government institutes. The pharmaceutical companies segment accounted for the largest share of the protein crystallization and crystallography market in 2019. This can be attributed to the increasing demand for protein-based drugs.

“The APAC market is expected to register the highest CAGR in the global protein crystallization and crystallography market during the forecast period”

The APAC market, particularly in China, Japan, and India, is expected to witness high growth in the coming five years. This growth will be driven by the emergence of a large number of research institutes, growing number of collaborations in China and India, and the rising demand for proteomics research in the region.

In-depth interviews were conducted with CEOs, marketing directors, other innovation and technology directors, and executives from various key organizations operating in the protein crystallization and crystallography market. Mentioned below is the breakdown of the interviews:

By Respondent Type: Supply Side: 80% and Demand Side: 20%

By Designation: C-level: 20%, D-level: 55%, and Others: 25%

By Region: North America: 50%, Europe: 20%, APAC: 20%, and the RoW: 10%

The major players operating in the global protein crystallization and crystallography market include Rigaku Corporation (Japan), Hampton Research (US), Jena Bioscience GmbH (Germany), and Bruker Corporation (US).

Research Coverage:

The study covers the market across various segments. It aims at estimating the market size and the growth potential of this market across different segments (product and service, end user, technology, and region). The study also includes an in-depth competitive analysis of the key players operating in the market, along with their company profiles, key observations related to their product and business offerings, recent developments, and key market strategies.

Key Benefits of Buying the Report:

This report will help market leaders as well as new entrants in the market by providing information on the closest approximations of the revenue numbers for the overall depth filtration market and its subsegments. It will also help stakeholders to understand the competitive landscape, gain more insights to better position their businesses, and plan suitable go-to-market strategies.

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About

The protein crystallization and crystallography market studied in this report has been segmented by technology, product (instruments and reagents), end user, and geography. Based on the technology used, the protein crystallization and crystallography market is further segmented into protein purification, protein crystallization, protein crystal mounting, and protein crystallography, of which protein crystallization accounted for the largest share of XX% in 2013.

Based on product, the protein crystallization and crystallography market has three segments, namely, instruments, reagents and consumables, and services and software, of which reagents and consumables was the major segment with a XX% share of the protein crystallization and crystallography market in 2013. This segment is also the fastest-growing segment owing to the increasing usage of reagents and consumables in protein crystallization and crystallography studies.

On the basis of end users, the protein crystallization and crystallography market is segmented into pharmaceutical companies, biotechnology companies, government agencies, and academic institutions. Pharmaceutical companies form the largest market and accounted for a XX% share of the protein crystallization and crystallography market in 2013. The protein crystallization and crystallography market is further segmented by regions, such as North America, Europe, Asia, and RoW (LATAM, Africa, the Middle East, and Pacific countries).

The global protein crystallization and crystallography market is a lucrative market that presents an array of opportunities for its stakeholders. This market is propelled by increasing research and development in the pharmaceutical and biotechnological arenas, ongoing technological advancements, and availability of funding. However, a few pivotal factors hindering the growth of this market are the lack of qualified researchers, reductions in R&D budgets, and the highly time-consuming and expensive nature of the process.

The life sciences industry is a constantly evolving industry that thrives on innovation. Owing to this, the expenditure on R&D activities is high. The protein crystallization and crystallography market is expected to benefit from this increased spending on R&D in the life sciences industry. According to Battelle (a non-profit research and development organization) and R&D Magazine, the global life sciences R&D spending is estimated to grow by XX% to reach \$XX trillion by 2014. The global biopharmaceutical sector

accounted for XX% of all R&D expenditures in the life science industry in 2013. Many of the big pharmaceutical companies such as Roche (Switzerland), Merck (U.S.), and Pfizer (U.S.) account for a major portion of the biopharmaceutical sector's revenue in R&D expenditure. In 2012, Roche, Merck, and Pfizer spent XX%, XX%, and XX% of their total revenue in R&D, respectively.

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