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SRI is a research organisation specializing in niche sector market reports.

We conduct in-depth secondary research to arrive at key insights, which are supported by data that has been analyzed impartially to present a clear picture of the industry. All recent developments and industry opinions which impact the sector dynamics are captured and used to support the research hypothesis.

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Executive summary

Over the past few years, globally, there has been huge demand for analytical instruments and automation products. The industry has been witnessing strong growth and leading players have experienced growth in revenues. There have been major investments in the sector particularly in areas of acquiring products and entering into new markets.

The report ‘Dynamics of the global analytical instruments market’ highlights key drivers of and trends emerging in the analytical instruments space globally. Initiatives of leading players such as GE Analytical Instruments, Thermo fisher Scientific, Agilent Technologies and Rockwell Automation have been examined. The rising demand along with emerging opportunity areas globally provides a strong rationale for analysing the industry.

Why should the report be purchased?

The objective of this report is to understand the overall analytical instrument industry dynamics and identify the opportunities existing in the market. The content in the report is useful for companies and investors both looking to enter or already existing in the market. Further, the report also highlights strategies adopted by various companies which will be helpful for new entrants as well as existing players.

Research methodology and delivery time

Smart Research Insights has conducted in depth secondary research to arrive at key insights. Data collected from key industry sources has been analyzed impartially to present a clear picture of the industry. All recent developments which impact the sector dynamics have been captured and used to support the research hypothesis.

The report is available as single-site single-user license. The delivery time for the electronic version of the report is 3 business days as each copy undergoes thorough quality check and is updated with the most recent information available. The delivery time for hard copies is approximately 3-5 business days, as each hard copy is custom printed for the client.

About Smart Research Insights (SRI)

SRI is a research organization which specializes in niche sector reports. We have a team of dedicated researchers with rich experience across industry segments that focus on delivering high quality analysis. We are also engaged in providing customized research solutions and company reports. For any research requirements please write to smartresearchinsights@gmail.com
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5. Emerging Opportunity Areas

Potential of Emerging Markets

The rapid industrial growth in emerging countries has boosted the demand for analytical instruments. Economies such as India, China, Brazil and Russia have been experiencing increased economic activity as there has been a trend of shifting of manufacturing bases from developed to developing regions. The emerging markets currently have immense potential and key players are expanding their presence here. Comparatively low manufacturing cost existing in these markets is also an advantage which attracts players.

In India currently a noteworthy opportunity exists as investments are being made into air and water pollution observation driven by regulations impacting emissions monitoring. These regulations need testing of new analytes such as mercury, consistent with global regulations. The present air emissions monitoring infrastructure in India is still in a nascent stage, hence, significant investment in this field is expected. The competitive landscape of the laboratory analytical instrument segment in India is primarily dotted with global suppliers with very few local players. The local players are mostly engaged in manufacturing simple measurement instruments.

Food and Beverages Testing Market

As compared to conventional pharma, the food industry has been tremendously good at taking up newer technologies to their supply chain. Globally, the food and beverages industry is a multi-billion dollar one which though primarily does not rely on analytical instruments, but is emerging as an important market for analytical and quality testing technologies. In recent times, the quality of beverages has been a cause of concern which has lead to rising demand for food testing instruments. Apart from directly being used in the industry, substantial demand for these kinds of instruments is emerging from the academia, government and independent testing labs which support the food industry. Even though there are a large number of players present in the analytical instruments market, still the demand from the food testing sector has not been entirely met and this presents an opportunity for companies.

Potential of Backward Integration

Both backward and forward integration is crucial for any industry to develop and non-existence of this structure, particularly in the emerging markets, has been a limitation for the rapid growth of the global analytical instruments market. Cost cutting has surfaced as a key focus area of players due to rising competitiveness in this market. Expanding presence to more areas of the industry value chain can assist...
7. Conclusion

The global market for analytical instruments looks bright post the financial crisis. Due to various factors such as the rising investment in developing new technology along with increasing adoption rate, the market is on its path to recovery. Other factors boosting the market’s growth include rising concern over environment and food safety, growing demand for better diagnostics to support ageing population and competition among suppliers. The market is further being driven by the shift of manufacturing bases from developed economies to emerging countries.

Positive trends globally such as continuous stress on regulatory compliance in all areas concerning human health, food consumption and environment are expected to steer the sector growth. Segments such as separation science instruments, mass spectrometers and life science instrumentation have shown increasing demand and growth rates globally. This growth has further led to continuous development of newer technologies in these segments.

On the supplier’s side, the industry has 20-25 dominant players who together make up approximately 60 per cent of the market share. This competitive situation poses an entry barrier for new players keen on entering the market. The entry of new players with their segmental expertise has given new dimensions to the global analytical instrument market.

"New requirements in the sector for food safety and the latest developments in pharmaceuticals production have led to high growth rates in the market for laboratory and analysis equipment. And thanks to large investments, among other things, this growth is expected to continue in the future." Susanne Grödl, Exhibition Director, Analytica Anacon

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