

Cell Analysis Global Market

[TECHNIQUES ((Molecular-based approaches (PCR, Sequencing, Microfluidics & Microarrays, Cell separation & isolation), Image-based approaches (Microscopy, Cytometry, High content screening, FISH & Spectrophotometry)), PRODUCTS (Consumables, Instruments & Others), APPLICATIONS (By process, By-Field & By-Therapeutic areas), END-USERS (Hospitals, Academic & Research Institutes, CROs, Pharma & Biotech Companies, Cell Banks, Diagnostic Labs & Others) REGIONAL (North America, Europe, Asia Pacific and Rest of the World)]

– Forecast to 2020



Copyright © 2015 IQ4I

All Rights Reserved. This document contains highly confidential information and is the sole property of IQ4I. No part of it may be circulated, copied, quoted, or otherwise reproduced without the approval of IQ4I.

2015

IQ4I Research & Consultancy Pvt. Ltd.

info@iq4i.com

www.iq4i.com

TABLE OF CONTENTS

1	EXECUTIVE SUMMARY	25
2	INTRODUCTION	36
2.1	KEY TAKE AWAYS	36
2.2	REPORT DESCRIPTION	37
2.3	MARKETS COVERED	38
2.4	STAKEHOLDERS.....	41
2.5	RESEARCH METHODOLOGY	42
2.5.1	MARKET SIZE ESTIMATION	43
2.5.2	MARKET BREAKDOWN & DATA TRIANGULATION	46
2.5.3	SECONDARY SOURCES	47
2.5.4	KEY DATA POINTS FROM SECONDARY SOURCES	48
2.5.5	PRIMARY SOURCES	49
2.5.6	KEY DATA POINTS FROM PRIMARY SOURCES	49
2.5.7	ASSUMPTIONS	50
3	MARKET ANALYSIS	51
3.1	INTRODUCTION	51
3.2	MARKET SEGMENTATION	52
3.3	FACTORS INFLUENCING MARKET	54
3.3.1	DRIVERS AND OPPORTUNITIES	55
3.3.1.1	Rising incidence of life threatening chronic diseases such as cancer and infectious diseases	55
3.3.1.2	Increasing government, corporate funding and investment in cell based research	55
3.3.1.3	Introduction of enhanced and precised cell imaging and analysis system reduces the cost and time consumption for drug discovery process.....	56
3.3.1.4	Availability of reagents and advanced cell analysis instruments	56
3.3.1.5	Increasing demand for cell analysis products by end users.....	57
3.3.1.6	Emerging Asia Pacific cell analysis market.....	57
3.3.1.7	CRO's to provide HCS services.....	58
3.3.1.8	Automation in oncology research for early diagnosis and cost reduction treatments	59
3.3.2	Restraints & Threats.....	60
3.3.2.1	Patents or IPR issues and stringent regulatory framework limits advancements in cellular analysis market.....	60

3.3.2.2	Lack of skilled personnel to perform High Content Screening	60
3.3.2.3	Expensive cell analysis instruments.....	61
3.4	REGULATORY AFFAIRS	61
3.4.1	U.S.	62
3.4.2	EUROPE.....	63
3.4.3	CHINA	63
3.4.4	INDIA.....	63
3.4.5	JAPAN	64
3.5	PORTER’S FIVE FORCE ANALYSIS.....	64
3.5.1	THREAT OF NEW ENTRANTS.....	65
3.5.2	THREAT OF SUBSTITUTES.....	66
3.5.3	RIVALRY AMONG EXISTING COMPETITORS	66
3.5.4	BARGAINING POWER OF SUPPLIERS	67
3.5.5	BARGAINING POWER OF BUYERS.....	67
3.6	LATEST AND UPCOMING PRODUCTS.....	67
3.7	ONGOING RESEARCHES AND FUNDING AGENCIES	73
3.8	MARKET SHARE ANALYSIS BY MAJOR PLAYERS.....	76
4	CELL ANALYSIS GLOBAL MARKET, TECHNIQUES.....	79
4.1	INTRODUCTION	79
4.2	MOLECULAR APPROACHES	83
4.2.1	PCR (POLYMERASE CHAIN REACTION).....	86
4.2.1.1	Real Time PCR/ qPCR	87
4.2.1.2	Digital PCR.....	87
4.2.2	SEQUENCING	89
4.2.2.1	DNA Sequencing	89
4.2.2.2	Early Methods	89
4.2.2.3	Advanced or De-Novo Sequencing	89
4.2.2.4	Next Generation Methods.....	90
4.2.2.5	RNA Sequencing	90
4.2.2.6	Protein sequencing.....	90
4.2.3	MICROFLUIDICS AND MICROARRAYS	92
4.2.3.1	Microfluidics	92
4.2.3.2	Microarray	92
4.2.4	NORTH CELL ISOLATION AND SEPARATION.....	93

4.2.4.1	Centrifugation	94
4.2.4.1.1	Micro-centrifugation	94
4.2.4.1.2	High-Speed Centrifugation or Super speed centrifugation	94
4.2.4.1.3	Ultra-centrifugation	95
4.2.4.2	Cell surface based separation	95
4.2.4.3	Filtration based cell separation	96
4.3	IMAGE BASED APPROACHES	97
4.3.1	MICROSCOPY	101
4.3.1.1	Optical Microscopy	102
4.3.1.1.1	Fluorescence Microscopy	102
4.3.1.1.1.1	Stimulated Emission Depletion (STED)	103
4.3.1.1.1.2	Total Internal Reflection Fluorescence (TIRF)	103
4.3.1.1.1.3	FRAP (Fluorescence Recovery After Photobleaching)	104
4.3.1.1.1.4	Laser Capture Microdissection	105
4.3.1.1.2	Confocal Microscopy	105
4.3.1.2	Electron microscopy	107
4.3.1.2.1	Scanning Electron Microscope (SEM)	107
4.3.1.2.2	Transmission Electron Microscopy (TEM)	107
4.3.1.2.3	Cryo-Electron Tomography (Cryo-ET)	107
4.3.1.3	Scanning Probe Microscopy (SPM)	108
4.3.2	CYTOMETRY	109
4.3.2.1	Flow cytometry	111
4.3.2.2	Laser scanning cytometry	113
4.3.2.3	Image cytometry	115
4.3.3	HIGH CONTENT SCREENING	116
4.3.4	FISH (FLUORESCENCE IN-SITU HYBRIDIZATION)	119
4.3.5	SPECTROPHOTOMETRY	121
5	GLOBAL CELL ANALYSIS PRODUCTS MARKET	123
5.1	INTRODUCTION	123
5.2	CONSUMABLES	126
5.2.1	ASSAY KITS	128
5.2.1.1	Immunoassays	129
5.2.1.2	Cell based assays	129
5.2.2	REAGENTS	130

5.2.3	MICROPLATES	132
5.2.4	CELL CULTURE CONSUMABLES	134
5.2.5	OTHERS.....	135
5.3	INSTRUMENTS.....	137
5.3.1	CELL COUNTERS	139
5.3.1.1	Hemocytometers	140
5.3.1.2	Automated cell counters	141
5.3.1.3	Coulter counters	141
5.3.1.4	Other cell counters.....	142
5.3.2	CELL MICROARRAYS.....	142
5.3.3	CELL ISOLATION AND SEPERATION INSTRUMENTS	144
5.3.4	CYTOMETERS	147
5.3.4.1	Flow cytometers	148
5.3.4.2	Laser scanning cytometers.....	150
5.3.4.3	Imaging cytometers	151
5.3.5	HIGH CONTENT SCREENING SYSTEMS	152
5.3.5.1	High content screening imaging and analysis system.....	154
5.3.5.2	High content screening software	155
5.3.6	MICROFLUIDIC DEVICES	156
5.3.7	PCR INSTRUMENTS	158
5.3.8	SPECTROPHOTOMETERS	160
5.3.8.1	Microplate readers	162
5.3.8.2	Fluorescent spectrophotometers	163
5.3.8.3	Calorimeters	163
5.3.9	MICROSCOPES	164
5.3.9.1	Electron microscopes.....	165
5.3.9.2	Inverted microscopes	166
5.3.9.3	Stereo microscopes.....	167
5.3.9.4	Fluorescence and confocal microscopes	167
5.3.9.5	Phase contrast microscopes	168
5.3.9.6	Other microscopes	168
5.3.10	OTHER INSTRUMENTS	169
5.4	OTHERS.....	170
6	GLOBAL CELL ANALYSIS APPLICATIONS MARKET	172

6.1	INTRODUCTION	172
6.2	CELL ANALYSIS APPLICATIONS, BY PROCESS	174
6.2.1	CELLULAR PROCESSES	175
6.2.2	SIGNAL TRANSDUCTION PATHWAY	177
6.2.3	CIRCULATING TUMOR CELLS	178
6.2.4	SINGLE CELL ANALYSIS	180
6.2.5	EPIGENETIC TARGET ANALYSIS	181
6.2.6	SUBPOPULATION CHARACTERIZATION	183
6.2.7	DRUG AND CANDIDATE SCREENING	184
6.3	CELL ANALYSIS APPLICATIONS, BY FIELD	185
6.3.1	FORENSICS	186
6.3.2	THERAPEUTICS	187
6.3.3	GENOMIC ANALYSIS	190
6.3.4	STEM CELL ANALYSIS	191
6.3.5	BIOMARKER RESEARCH	193
6.3.6	CELL IMAGING	194
6.3.7	DIAGNOSTICS	196
6.4	CELL ANALYSIS APPLICATIONS, BY THERAPEUTIC AREA	198
6.4.1	CANCER RESEARCH	199
6.4.2	GENETIC TESTING	200
6.4.3	INFECTIOUS DISEASES	201
6.4.4	IMMUNOLOGY	202
6.4.5	OTHERS	204
7	CELL ANALYSIS GLOBAL MARKET, BY END-USERS	206
7.1	INTRODUCTION	206
7.2	HOSPITALS	208
7.3	ACADEMIC & RESEARCH LABORATORIES	210
7.4	DIAGNOSTIC LABORATORIES	212
7.5	PHARMACEUTICALS AND BIOTECH COMPANIES	213
7.6	CONTRACT RESEARCH ORGANISATIONS	215
7.7	CELL BANKS	216
7.8	OTHERS	217
8	REGIONAL MARKET ANALYSIS	219
8.1	INTRODUCTION	219

8.2	NORTH AMERICA	221
8.2.1	U.S.	223
8.3	EUROPE	233
8.4	ASIA PACIFIC	246
8.5	REST OF THE WORLD	259
9	COMPANY DEVELOPMENTS	271
9.1	INTRODUCTION	271
9.1.1	NEW PRODUCT LAUNCHES AS A MAJOR GROWTH STRATEGY OF CELL ANALYSIS PLAYERS.....	271
9.2	NEW PRODUCT LAUNCH.....	272
9.3	AGREEMENTS, PARTNERSHIPS, COLLABORATIONS & JOINT VENTURES	288
9.4	APPROVALS	296
9.5	MERGERS AND ACQUISITIONS	299
9.6	OTHER DEVELOPMENTS	305
10	MAJOR PLAYER PROFILES	307
10.1	AGILENT TECHNOLOGIES, INC.	307
10.1.1	OVERVIEW	307
10.1.2	FINANCIALS	308
10.1.3	PRODUCT PORTFOLIO	310
10.1.4	KEY DEVELOPMENTS	313
10.1.5	BUSINESS STRATEGY	317
10.1.6	SWOT ANALYSIS.....	318
10.2	BECTON, DICKINSON AND COMPANY	319
10.2.1	OVERVIEW	319
10.2.2	FINANCIALS	320
10.2.3	PRODUCT PORTFOLIO	322
10.2.4	KEY DEVELOPMENTS	324
10.2.5	BUSINESS STRATEGY	326
10.2.6	SWOT ANALYSIS.....	327
10.3	BIO-RAD LABORATORIES	328
10.3.1	OVERVIEW	328
10.3.2	FINANCIALS	329
10.3.3	PRODUCT PORTFOLIO	330
10.3.4	KEY DEVELOPMENTS	332
10.3.5	BUSINESS STRATEGY	334

10.3.6	SWOT ANALYSIS.....	335
10.4	DANAHER CORPORATION.....	336
10.4.1	OVERVIEW	336
10.4.2	FINANCIALS	337
10.4.3	PRODUCT PORTFOLIO	339
10.4.4	KEY DEVELOPMENTS	345
10.4.5	BUSINESS STRATEGY.....	348
10.4.6	SWOT ANALYSIS.....	349
10.5	GE HEALTHCARE.....	350
10.5.1	OVERVIEW	350
10.5.2	FINANCIALS	351
10.5.3	PRODUCT PORTFOLIO	353
10.5.4	KEY DEVELOPMENTS	358
10.5.5	BUSINESS STRATEGY.....	360
10.5.6	SWOT ANALYSIS.....	360
10.6	MERCK KGAA.....	361
10.6.1	OVERVIEW	361
10.6.2	FINANCIALS	362
10.6.3	PRODUCT PORTFOLIO	364
10.6.4	KEY DEVELOPMENTS	366
10.6.5	BUSINESS STRATEGY.....	368
10.6.6	SWOT ANALYSIS.....	369
10.7	OLYMPUS CORPORATION	370
10.7.1	OVERVIEW	370
10.7.2	FINANCIALS	371
10.7.3	PRODUCT PORTFOLIO	373
10.7.4	KEY DEVELOPMENTS	375
10.7.5	BUSINESS STRATEGY.....	376
10.7.6	SWOT ANALYSIS.....	377
10.8	PERKINELMER, INC.	378
10.8.1	OVERVIEW	378
10.8.2	FINANCIALS	379
10.8.3	PRODUCT PORTFOLIO	381
10.8.4	KEY DEVELOPMENTS	382

10.8.5	BUSINESS STRATEGY	384
10.8.6	SWOT ANALYSIS.....	385
10.9	PROMEGA CORPORATION	386
10.9.1	OVERVIEW	386
10.9.2	FINANCIALS	387
10.9.3	PRODUCT PORTFOLIO	387
10.9.4	KEY DEVELOPMENTS	389
10.9.5	BUSINESS STRATEGY	391
10.9.6	SWOT ANALYSIS.....	392
10.10	QIAGEN N.V.	393
10.10.1	OVERVIEW	393
10.10.2	FINANCIALS	393
10.10.3	PRODUCT PORTFOLIO	395
10.10.4	KEY DEVELOPMENTS	398
10.10.5	BUSINESS STRATEGY	401
10.10.6	SWOT ANALYSIS.....	402
10.11	SIGMA ALDRICH CORPORATION	403
10.11.1	OVERVIEW	403
10.11.2	FINANCIALS	404
10.11.3	PRODUCT PORTFOLIO	405
10.11.4	KEY DEVELOPMENTS	407
10.11.5	BUSINESS STRATEGY	409
10.11.6	SWOT ANALYSIS.....	410
10.12	THERMO FISHER SCIENTIFIC, INC.	411
10.12.1	OVERVIEW	411
10.12.2	FINANCIALS	412
10.12.3	PRODUCT PORTFOLIO	414
10.12.4	KEY DEVELOPMENTS	418
10.12.5	BUSINESS STRATEGY	421
10.12.6	SWOT ANALYSIS.....	422

LIST OF TABLES

TABLE 1	CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	29
TABLE 2	CELL ANALYSIS GLOBAL TECHNIQUES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	30
TABLE 3	CELL ANALYSIS GLOBAL PRODUCTS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	31
TABLE 4	CELL ANALYSIS GLOBAL APPLICATION MARKET REVENUE, BY PROCESS, BY TYPE (2012-2020) (\$MN)	32
TABLE 5	CELL ANALYSIS GLOBAL APPLICATION MARKET REVENUE, BY FIELD, BY TYPE (2012-2020) (\$MN)	33
TABLE 6	CELL ANALYSIS GLOBAL APPLICATION MARKET REVENUE, BY THERAPEUTIC AREA, BY TYPE (2012-2020) (\$MN)	34
TABLE 7	CELL ANALYSIS GLOBAL END USERS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	35
TABLE 8	CELL ANALYSIS GLOBAL TECHNIQUES MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	81
TABLE 9	CELL ANALYSIS GLOBAL MARKET REVENUE, BY TECHNIQUE, (2012-2020) (\$MN)	82
TABLE 10	MOLECULAR APPROACHES CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	85
TABLE 11	CELL ANALYSIS MOLECULAR APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	86
TABLE 12	PCR TECHNIQUE IN CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	88
TABLE 13	SEQUENCING TECHNIQUE IN CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	91
TABLE 14	MICROFLUIDICS & MICROARRAYS IN CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	93
TABLE 15	CELL ISOLATION/ SEPARATION TECHNIQUES IN CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	97
TABLE 16	IMAGE-BASED APPROACHES CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	99
TABLE 17	IMAGE-BASED APPROACHES CELL ANALYSIS GLOBAL MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	100
TABLE 18	MICROSCOPY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	101
TABLE 19	MICROSCOPY CELL ANALYSIS GLOBAL MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	102
TABLE 20	OPTICAL MICROSCOPY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	106
TABLE 21	ELECTRON MICROSCOPY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	108
TABLE 22	SCANNING PROBE MICROSCOPY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	109
TABLE 23	CYTOMETRY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	110

TABLE 24	CYTOMETRY CELL ANALYSIS GLOBAL MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	111
TABLE 25	FLOW CYTOMETRY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	113
TABLE 26	LASER SCANNING CYTOMETRY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	114
TABLE 27	IMAGE CYTOMETRY SCREENING CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	116
TABLE 28	HIGH CONTENT SCREENING CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	118
TABLE 29	FISH (FLUORESCENT IN-SITU HYBRIDIZATION) CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	120
TABLE 30	SPECTROPHOTOMETRY CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION, (2012-2020) (\$MN)	122
TABLE 31	CELL ANALYSIS GLOBAL PRODUCTS MARKET, BY TYPE (2012-2020) (\$MN)	125
TABLE 32	CELL ANALYSIS CONSUMABLES GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	126
TABLE 33	CELL ANALYSIS CONSUMABLES GLOBAL MARKET, BY TYPE (2012-2020) (\$MN)	127
TABLE 34	CELL ANALYSIS ASSAY KITS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	128
TABLE 35	CELL ANALYSIS REAGENTS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	132
TABLE 36	CELL ANALYSIS MICROPLATES GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	133
TABLE 37	CELL ANALYSIS CONSUMABLES MARKET FOR CELL CULTURE, BY REGION (2012-2020) (\$MN)	135
TABLE 38	GLOBAL CELL ANALYSIS OTHER CONSUMABLES MARKET, BY REGION (2012-2020) (\$MN)	136
TABLE 39	CELL ANALYSIS INSTRUMENTS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	137
TABLE 40	CELL ANALYSIS INSTRUMENTS GLOBAL MARKET, BY TYPE (2012-2020) (\$MN)	138
TABLE 41	CELL ANALYSIS CELL COUNTERS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	140
TABLE 42	CELL ANALYSIS CELL MICROARRAYS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	144
TABLE 43	CELL ANALYSIS CELL ISOLATION/ SEPARATION INSTRUMENTS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	146
TABLE 44	CELL ANALYSIS CYTOMETERS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	148
TABLE 45	CELL ANALYSIS HIGH CONTENT SCREENING GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	153
TABLE 46	CELL ANALYSIS MARKET FOR MICROFLUIDIC DEVICES, BY REGION (2012-2020) (\$MN)	158
TABLE 47	CELL ANALYSIS MARKET FOR PCR DEVICES, BY REGION (2012-2020) (\$MN)	160
TABLE 48	CELL ANALYSIS SPECTROPHOTOMETERS GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	161

TABLE 49	CELL ANALYSIS MICROSCOPES GLOBAL MARKET, BY REGION (2012-2020) (\$MN)	165
TABLE 50	GLOBAL CELL ANALYSIS OTHER INSTRUMENTS MARKET, BY REGION (2012-2020) (\$MN)	170
TABLE 51	GLOBAL CELL ANALYSIS OTHER (SERVICES) PRODUCTS MARKET, BY REGION (2012-2020) (\$MN)	171
TABLE 52	GLOBAL CELL ANALYSIS APPLICATION MARKET, BY REGION (2012-2020) (\$MN)	173
TABLE 53	GLOBAL CELL ANALYSIS APPLICATION MARKET FOR CELLULAR PROCESSES, BY REGION, (2012-2020) (\$MN)	176
TABLE 54	GLOBAL CELL ANALYSIS APPLICATION MARKET FOR SIGNAL TRANSDUCTION STUDIES, BY REGION (2012-2020) (\$MN)	178
TABLE 55	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR CTC, BY REGION (2012-2020) (\$MN)	179
TABLE 56	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR SINGLE CELL ANALYSIS, BY REGION (2012-2020) (\$MN)	181
TABLE 57	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR EPIGENETIC TARGET ANALYSIS, BY REGION (2012-2020) (\$MN)	182
TABLE 58	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR SUBPOPULATION CHARACTERIZATION, BY REGION (2012-2020) (\$MN)	183
TABLE 59	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR DRUG AND CANDIDATE SCREENING, BY REGION (2012-2020) (\$MN)	185
TABLE 60	GLOBAL CELL ANALYSIS APPLICATION MARKET RELATED TO FORENSICS, BY REGION, (2012-2020) (\$MN)	187
TABLE 61	GLOBAL CELL ANALYSIS APPLICATION MARKET RELATED TO THERAPEUTICS, BY REGION (2012-2020) (\$MN)	189
TABLE 62	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR GENOMIC ANALYSIS, BY REGION (2012-2020) (\$MN)	191
TABLE 63	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR STEM CELL ANALYSIS, BY REGION (2012-2020) (\$MN)	192
TABLE 64	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR BIOMARKER RESEARCH, BY REGION (2012-2020) (\$MN)	194
TABLE 65	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR CELL IMAGING, BY REGION (2012-2020) (\$MN)	196
TABLE 66	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR DIAGNOSTICS, BY REGION (2012-2020) (\$MN)	197
TABLE 67	GLOBAL CELL ANALYSIS APPLICATION MARKET FOR CANCER RESEARCH, BY REGION, (2012-2020) (\$MN)	199
TABLE 68	GLOBAL CELL ANALYSIS APPLICATION MARKET FOR GENETIC TESTING, BY REGION (2012-2020) (\$MN)	201
TABLE 69	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR INFECTIOUS DISEASES, BY REGION (2012-2020) (\$MN)	202
TABLE 70	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR IMMUNOLOGY, BY REGION (2012-2020) (\$MN)	203
TABLE 71	GLOBAL CELL ANALYSIS APPLICATIONS MARKET FOR OTHER THERAPEUTIC AREAS, BY REGION (2012-2020) (\$MN)	205
TABLE 72	CELL ANALYSIS GLOBAL END USERS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	208

TABLE 73	GLOBAL CELL ANALYSIS MARKET REVENUE FROM HOSPITALS, BY REGION, (2012-2020) (\$MN)	210
TABLE 74	GLOBAL CELL ANALYSIS MARKET REVENUE FROM ACADEMICS & RESEARCH LABORATORIES, BY REGION, (2012-2020) (\$MN)	211
TABLE 75	GLOBAL CELL ANALYSIS MARKET REVENUE FROM DIAGNOSTIC LABORATORIES, BY REGION, (2012-2020) (\$MN)	213
TABLE 76	GLOBAL CELL ANALYSIS MARKET REVENUE FROM PHARMA & BIOTECH COMPANIES, BY REGION, (2012-2020) (\$MN)	214
TABLE 77	GLOBAL CELL ANALYSIS MARKET REVENUE FROM CRO'S, BY REGION, (2012-2020) (\$MN)	216
TABLE 78	GLOBAL CELL ANALYSIS MARKET REVENUE FROM CELL BANKS, BY REGION, (2012-2020) (\$MN)	217
TABLE 79	GLOBAL CELL ANALYSIS MARKET REVENUE FROM OTHER END USERS, BY REGION, (2012-2020) (\$MN)	218
TABLE 80	NORTH AMERICAN CELL ANALYSIS TECHNIQUES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	224
TABLE 81	NORTH AMERICAN MOLECULAR APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	225
TABLE 82	NORTH AMERICAN IMAGE BASED APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	226
TABLE 83	NORTH AMERICAN CELL ANALYSIS PRODUCTS MARKET REVENUE, BY TYPE (2012-2020) (\$MN)	227
TABLE 84	NORTH AMERICAN CONSUMABLES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	228
TABLE 85	NORTH AMERICAN INSTRUMENTS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	229
TABLE 86	NORTH AMERICAN APPLICATIONS MARKET REVENUE, BY PROCESSES, BY TYPE, (2012-2020) (\$MN)	230
TABLE 87	NORTH AMERICAN APPLICATIONS MARKET REVENUE, BY FIELD, BY TYPE, (2012-2020) (\$MN)	231
TABLE 88	NORTH AMERICAN APPLICATIONS MARKET REVENUE, BY THERAPEUTIC AREAS, BY TYPE, (2012-2020) (\$MN)	232
TABLE 89	NORTH AMERICAN CELL ANALYSIS END USERS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	233
TABLE 90	EUROPEAN CELL ANALYSIS TECHNIQUES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	236
TABLE 91	EUROPEAN MOLECULAR APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	237
TABLE 92	EUROPEAN IMAGE BASED APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	238
TABLE 93	EUROPEAN CELL ANALYSIS PRODUCTS MARKET REVENUE, BY TYPE (2012-2020) (\$MN)	239
TABLE 94	EUROPEAN CONSUMABLES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	240
TABLE 95	EUROPEAN INSTRUMENTS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	241
TABLE 96	EUROPEAN APPLICATIONS MARKET REVENUE, BY PROCESSES, BY TYPE, (2012-2020) (\$MN)	242

TABLE 97	EUROPEAN APPLICATIONS MARKET REVENUE, BY FIELD, BY TYPE, (2012-2020) (\$MN)	243
TABLE 98	EUROPEAN APPLICATIONS MARKET REVENUE, BY THERAPEUTIC AREAS, BY TYPE, (2012-2020) (\$MN)	244
TABLE 99	EUROPEAN CELL ANALYSIS END USERS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	245
TABLE 100	ASIA PACIFIC CELL ANALYSIS TECHNIQUES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	249
TABLE 101	ASIA PACIFIC MOLECULAR APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	250
TABLE 102	ASIA PACIFIC IMAGE BASED APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	251
TABLE 103	ASIA PACIFIC CELL ANALYSIS PRODUCTS MARKET REVENUE, BY TYPE (2012-2020) (\$MN)	252
TABLE 104	ASIA PACIFIC CONSUMABLES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	253
TABLE 105	ASIA PACIFIC INSTRUMENTS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	254
TABLE 106	ASIA PACIFIC APPLICATIONS MARKET REVENUE, BY PROCESSES, BY TYPE, (2012-2020) (\$MN)	255
TABLE 107	ASIA PACIFIC APPLICATIONS MARKET REVENUE, BY FIELD, BY TYPE, (2012-2020) (\$MN)	256
TABLE 108	ASIA PACIFIC APPLICATIONS MARKET REVENUE, BY THERAPEUTIC AREAS, BY TYPE, (2012-2020) (\$MN)	257
TABLE 109	ASIA PACIFIC CELL ANALYSIS END USERS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	258
TABLE 110	ROW CELL ANALYSIS TECHNIQUES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	261
TABLE 111	ROW MOLECULAR APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	262
TABLE 112	ROW IMAGE BASED APPROACHES MARKET REVENUE, BY TYPES, (2012-2020) (\$MN)	263
TABLE 113	ROW CELL ANALYSIS PRODUCTS MARKET REVENUE, BY TYPE (2012-2020) (\$MN)	264
TABLE 114	ROW CONSUMABLES MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	265
TABLE 115	ROW INSTRUMENTS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	266
TABLE 116	ROW APPLICATIONS MARKET REVENUE, BY PROCESSES, BY TYPE, (2012-2020) (\$MN)	267
TABLE 117	ROW APPLICATIONS MARKET REVENUE, BY FIELD, BY TYPE, (2012-2020) (\$MN)	268
TABLE 118	ROW APPLICATIONS MARKET REVENUE, BY THERAPEUTIC AREAS, BY TYPE, (2012-2020) (\$MN)	269
TABLE 119	ROW CELL ANALYSIS END USERS MARKET REVENUE, BY TYPE, (2012-2020) (\$MN)	270
TABLE 120	NEW PRODUCT LAUNCHES, (2011-2015)	273
TABLE 121	AGREEMENTS, PARTNERSHIPS, COLLABORATIONS & JOINT VENTURE, (2011-2014)	289
TABLE 122	APPROVALS, (2013-2014)	297

TABLE 123	MERGERS AND ACQUISITIONS, (2013-2014)	300
TABLE 124	OTHER DEVELOPMENTS (2013-2014)	305
TABLE 125	AGILENT TECHNOLOGIES, INC.: TOTAL REVENUE AND R&D EXPENSES (2012-2014) (\$MN)	308
TABLE 126	AGILENT TECHNOLOGIES, INC.: TOTAL REVENUE, BY SEGMENTS, (2012-2014) (\$MN)	309
TABLE 127	AGILENT TECHNOLOGIES, INC.: TOTAL REVENUE, BY GEOGRAPHY, (2012-2014) (\$MN)	310
TABLE 128	BECTON, DICKINSON AND COMPANY: TOTAL REVENUE AND R&D EXPENSES (2012-2014) (\$MN)	320
TABLE 129	BECTON, DICKINSON AND COMPANY: TOTAL REVENUE, BY SEGMENTS (2012-2014) (\$ MN)	321
TABLE 130	BECTON, DICKINSON AND COMPANY: TOTAL REVENUE, BY GEOGRAPHY (2012-2014) (\$ MN)	322
TABLE 131	BIO-RAD LABORATORIES: TOTAL REVENUE AND R&D EXPENSES (2011-2013) (\$MN)	329
TABLE 132	BIO-RAD LABORATORIES: TOTAL REVENUE, BY SEGMENTS (2011-2013) (\$MN)	329
TABLE 133	BIO-RAD LABORATORIES: TOTAL REVENUE, BY GEOGRAPHY (2011-2013) (\$MN)	330
TABLE 134	DANAHER CORPORATION: TOTAL REVENUE AND R&D EXPENSES (2011-2013) (\$BN)	337
TABLE 135	DANAHER CORPORATION: TOTAL REVENUE, BY SEGMENTS (2011-2013) (\$BN)	338
TABLE 136	DANAHER CORPORATION: TOTAL REVENUE, BY GEOGRAPHY (2011-2013) (\$BN)	339
TABLE 137	GENERAL ELECTRIC COMPANY: TOTAL REVENUE AND R&D EXPENSES (2012 – 2014) (\$BN)	351
TABLE 138	GENERAL ELECTRIC COMPANY: TOTAL REVENUE, BY SEGMENTS, (2012-2014) (\$BN)	352
TABLE 139	GENERAL ELECTRIC COMPANY: TOTAL REVENUE, BY GEOGRAPHY, (2012-2014) (\$BN)	353
TABLE 140	MERCK KGAA: TOTAL REVENUE AND R&D EXPENSES (2012 – 2014) (\$MN)	362
TABLE 141	MERCK KGAA: TOTAL REVENUE, BY SEGMENTS, (2012-2014) (\$BN)	363
TABLE 142	MERCK KGAA: TOTAL REVENUE, BY GEOGRAPHY, (2012-2014) (\$BN)	364
TABLE 143	OLYMPUS CORPORATION : TOTAL REVENUE AND R&D EXPENSES (2011-2013) (\$MN)	371
TABLE 144	OLYMPUS CORPORATION : TOTAL REVENUE, BY SEGMENTS (2011-2013) (\$MN)	372
TABLE 145	OLYMPUS CORPORATION : TOTAL REVENUE, BY REGION (2011-2013) (\$MN)	373
TABLE 146	PERKINELMER, INC.: TOTAL REVENUE AND R&D EXPENSES (2012-2014) (\$MN)	379
TABLE 147	PERKINELMER, INC.: TOTAL REVENUE, BY SEGMENTS (2012-2014) (\$MN)	379
TABLE 148	PERKINELMER, INC.: TOTAL REVENUE, BY GEOGRAPHY (2012-2014) (\$MN)	380
TABLE 149	PROMEGA CORPORATION: TOTAL REVENUE AND R&D EXPENSES, (2011-2013) (\$MN)	387

TABLE 150	QIAGEN'S: TOTAL REVENUE AND R&D EXPENSES, (2011-2013) (\$MN)	393
TABLE 151	QIAGEN'S: TOTAL REVENUE, BY SEGMENTS, (2011-2013) (\$MN)	394
TABLE 152	QIAGEN'S: TOTAL REVENUE, BY GEOGRAPHY, (2011-2013) (\$MN)	395
TABLE 153	SIGMA ALDRICH'S: TOTAL REVENUE AND R&D EXPENSES, (2012-2014) (\$MN)	404
TABLE 154	SIGMA ALDRICH'S: TOTAL REVENUE, BY SEGMENTS, (2012-2014) (\$MN)	404
TABLE 155	SIGMA ALDRICH'S: TOTAL REVENUE, BY GEOGRAPHY, (2012-2014) (\$MN)	405
TABLE 156	THERMO FISHER SCIENTIFIC, INC.: TOTAL REVENUE AND R&D EXPENSES (2011-2013) (\$BN)	412
TABLE 157	THERMO FISHER SCIENTIFIC, INC.: TOTAL REVENUE, BY SEGMENTS (2011-2013) (\$BN)	413
TABLE 158	THERMO FISHER SCIENTIFIC, INC.: TOTAL REVENUE, BY GEOGRAPHY (2011-2013) (\$BN)	414

LIST OF FIGURES

FIGURE 1	GLOBAL CELL ANALYSIS MARKET SHARE, BY GEOGRAPHY (2012 -2020)	28
FIGURE 2	RESEARCH METHODOLOGY: CELL ANALYSIS GLOBAL MARKET	43
FIGURE 3	CELL ANALYSIS MARKET: TOP-DOWN AND BOTTOM-UP APPROACH	44
FIGURE 4	CELL ANALYSIS MARKET: FORECASTING MODEL	45
FIGURE 5	CELL ANALYSIS MARKET: MARKET BREAKDOWN & DATA TRIANGULATION	46
FIGURE 6	GLOBAL CELL ANALYSIS MARKET: MARKET SEGMENTATION	53
FIGURE 7	MARKET DYNAMICS	54
FIGURE 8	CELL ANALYSIS MARKET: PORTER’S ANALYSIS	65
FIGURE 9	GLOBAL CELL ANALYSIS MARKET SHARE ANALYSIS, BY KEY PLAYERS, 2013	76
FIGURE 10	GLOBAL CELL ANALYSIS MARKET REVENUE, BY TECHNIQUE (2013 V’S 2020) (\$ MN)	80
FIGURE 11	MOLECULAR APPROACHES CELL ANALYSIS MARKET SHARE, BY TYPE (2013 V’S 2020) (%)	84
FIGURE 12	IMAGE-BASED APPROACHES CELL ANALYSIS GLOBAL MARKET REVENUE, BY TYPE (2013 V’S 2020) (\$ MN)	98
FIGURE 13	GLOBAL CELL ANALYSIS MARKET, BY PRODUCT, (2013 V’S 2020), (\$MN)	124
FIGURE 14	GLOBAL CELL ANALYSIS APPLICATION MARKET SHARE, BY PROCESS OUTLOOK WITH CAGR (2012-2020) (\$MN)	175
FIGURE 15	GLOBAL CELL ANALYSIS APPLICATION MARKET, BY FIELD OUTLOOK (2012-2020) (\$MN)	186
FIGURE 16	GLOBAL CELL ANALYSIS APPLICATION MARKET, BY THERAPEUTIC AREA OUTLOOK (2012-2020) (\$MN)	198
FIGURE 17	GLOBAL CELL ANALYSIS MARKET REVENUE, BY END USERS (2012-2020) (\$MN)	207
FIGURE 18	GLOBAL CELL ANALYSIS MARKET REVENUE, BY REGION (2014-2020) (\$MN)	220
FIGURE 19	OUTLOOK OF NORTH AMERICAN MARKET SIZE, BY PRODUCTS, APPLICATIONS, TECHNIQUES & END-USERS (2013 & 2020)	222
FIGURE 20	OUTLOOK OF EUROPEAN MARKET SIZE, BY PRODUCTS, APPLICATIONS, TECHNIQUES & END-USERS (2013 & 2020)	235
FIGURE 21	OUTLOOK OF ASIA PACIFIC MARKET SIZE, BY PRODUCTS, APPLICATIONS, TECHNIQUES & END-USERS (2013 & 2020)	248
FIGURE 22	OUTLOOK OF ROW MARKET SIZE, BY PRODUCTS, APPLICATIONS, TECHNIQUES & END-USERS (2013 & 2020)	260
FIGURE 23	KEY GROWTH STRATEGIES, (2011-2014)	271
FIGURE 24	SWOT ANALYSIS: AGILENT TECHNOLOGIES. INC,	318
FIGURE 25	SWOT: BECTON, DICKINSON AND COMPANY	327
FIGURE 26	SWOT: BIO-RAD LABORATORIES	335
FIGURE 27	SWOT: DANAHER CORPORATION	349
FIGURE 28	SWOT: GE HEALTHCARE	360
FIGURE 29	SWOT: MERCK KGAA	369
FIGURE 30	SWOT: OLYMPUS CORPORATION	377

FIGURE 31	SWOT: PERKINELMER, INC.	385
FIGURE 32	SWOT: PROMEGA CORPORATION	392
FIGURE 33	SWOT: QIAGEN N.V	402
FIGURE 34	SWOT: SIGMA ALDRICH CORPORATION	410
FIGURE 35	SWOT: THERMO FISHER SCIENTIFIC	422

1.1 REPORT DESCRIPTION

Cell analysis plays a major role in gene identification, protein identification, transcription analysis and epigenomics at cellular level. It proves to be an ultra-sensitive device to elucidate specific molecular processes and pathways and reveal the nature of cell heterogeneity. Hospitals, academic institutions, government bodies, as well as pharmaceutical and biotechnology firms are increasing their focus on application of cell analysis as a modern emerging tool in research, drug discovery and diagnosis. The cell analysis techniques global market is segmented into molecular approaches, image-based approaches and others. The molecular approaches include the PCR, NGS and Microfluidics, cell isolation & separation techniques performed at cells genomic level, where as the image-based approaches include microscopes, FISH, FRAP, tracking, high content screening (HCS), cytometry techniques etc. The cell analysis products market is mainly segmented into consumables and instruments. The consumables include reagents, assay plates and microplates where as the instrument segment comprises of microscopes, flow cytometers, spectrophotometer, quantitative polymerase chain reaction (QPCR), microfluidic devices, cell counters, high content screening (HCS) systems and cell microarrays.

By application, the market is segmented into by processes, by field and by therapeutics. By processes is segmented into Cellular processes, Signal transduction pathways, Circulating tumor cells, Single cell analysis, Epigenetic target analysis, Subpopulation Characterization, Drug and candidate screening. By field is further segmented into forensic Science, therapeutics, cell imaging, biomarker research, genomic analysis, stem cell analysis, and diagnostics. By therapeutics is further segmented into cancer research, infectious disease diagnosis, genetic testing, immunology, others.

By end-users, the market is segmented into Hospitals, Academic and Research Institutes, Contract Research Organizations (CROs), Pharmaceuticals and Biotechnology Companies, Cell Banks, Diagnostic Laboratories and others.

By geography, the market is segmented into North America, Europe, Asia Pacific and Rest of World. North America holds the largest market share, followed by Europe and Asia. The APAC regions tend to be an emerging market with an opportunity for growth and are likely to be a destination of investment for new investors in the cell analysis market. Drug discovery services

outsourcing and government funding for novel screening technologies has resulted in growth of Asian markets.

The cell analysis market is expected to grow at a rate of 9.6% during the forecast period. The major factor influencing the growth is enhanced precision of cell imaging and analysis systems which in turn reduce time and cost of drug discovery process. In addition, the factors like increasing incidence of cancer, increasing government investments, funds and grants, availability of reagents and cell analysis instruments are driving the growth of the market. However, the major market restraints include high capital investments and shortage of skilled labour for high content screening procedure. The biggest opportunities for this market is the emerging APAC market, high content screening services provided by contract research organizations, automation in cancer research for its early diagnosis and reduction of cost in the cancer treatment.

The global cell analysis market is a competitive market and all the active players in this market are involved in innovating new and advanced products to maintain their market shares. The key players in the global cell analysis market include Agilent Technologies, Inc. (U.S.), Becton Dickinson and Company (U.S.), Bio-Rad Laboratories (U.S.), Danaher Corporation (U.S.), GE Healthcare (U.K.), Merck KGAA (Germany), Olympus Corporation (Japan), PerkinElmer, Inc. (U.S.), Promega Corporation (U.S.), Qiagen N.V. (Netherlands), Sigma-Aldrich Corporation (U.S.) and Thermo Fisher Scientific, Inc. (U.S.). In order to offer the products with better software, most of the players in the cell analysis market are collaborating with companies and educational institutions.

The report provides an in depth market analysis of the above mentioned segments across the following regions:

- North America
- Europe
- Asia-Pacific
- Rest of the World (RoW)

TABLE 1

**CELL ANALYSIS GLOBAL MARKET REVENUE, BY REGION
(2012-2020) (\$MN)**

Region	2012	2013	2014	2020	CAGR (%) (2014-2020)
North America	XX	XX	XX	XX	XX
Europe	XX	XX	XX	XX	XX
Asia-Pacific	XX	XX	XX	XX	XX
RoW	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: American Genetic Association (AGA), Association of Molecular Pathology (AMP), European Association of Clinical Cell Analysis (EACCA), International Society for Advancement of Cytometry (ISAC), International Society for Stem Cell Research (ISSCR), Microscopy Society of America (MSA), World Health Organization (WHO), Industry expert Interviews, and IQ4I analysis

North America accounted for the largest revenue of \$XX million of the global cell analysis market in 2013. It is expected to grow at a CAGR of XX% from 2014 to 2020 to reach \$XX million by 2020. Asia-Pacific is expected to grow at the highest CAGR of XX% during the forecast period.

TABLE 2

**CELL ANALYSIS GLOBAL TECHNIQUES MARKET REVENUE, BY
TYPE (2012-2020) (\$MN)**

Type	2012	2013	2014	2020	CAGR (%) (2014-2020)
Molecular Approaches	XX	XX	XX	XX	XX
Image-Based Approaches	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: American Genetic Association (AGA), Association of Molecular Pathology (AMP), European Association of Clinical Cell Analysis (EACCA), International Society for Advancement of Cytometry (ISAC), International Society for Stem Cell Research (ISSCR), Microscopy Society of America (MSA), World Health Organization (WHO), Industry expert Interviews, and IQ4I analysis

Molecular approaches commanded the largest revenue of \$XX million of the global cell analysis techniques market in 2013. The market is expected to grow at a CAGR of XX% from 2014 to 2020 to reach \$XX million by 2020. Image based approaches are expected to grow at a strong CAGR of XX% during the forecast period.

TABLE 3

**CELL ANALYSIS GLOBAL PRODUCTS MARKET REVENUE,
BY TYPE (2012-2020) (\$MN)**

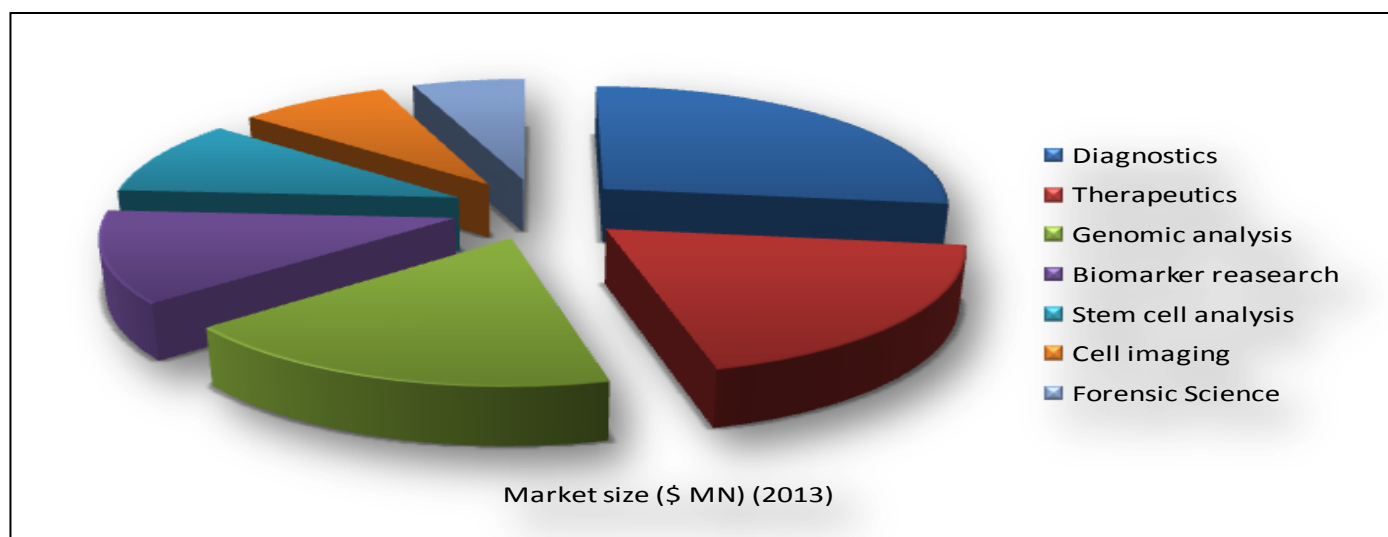
Type	2012	2013	2014	2020	CAGR (%) (2014-2020)
Consumables	XX	XX	XX	XX	XX
Instruments	XX	XX	XX	XX	XX
Others (Services)	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: American Genetic Association (AGA), Association of Molecular Pathology (AMP), European Association of Clinical Cell Analysis (EACCA), International Society for Advancement of Cytometry (ISAC), International Society for Stem Cell Research (ISSCR), Microscopy Society of America (MSA), World Health Organization (WHO), Industry expert Interviews, and IQ4I analysis

Consumables commanded the largest revenue of \$XX million of the global cell analysis products market in 2013. The market is expected to grow at a CAGR of XX% from 2014 to 2020 to reach \$XX million by 2020. Others (services) are expected to grow at a strong CAGR of XX% during the forecast period.

FIGURE 1

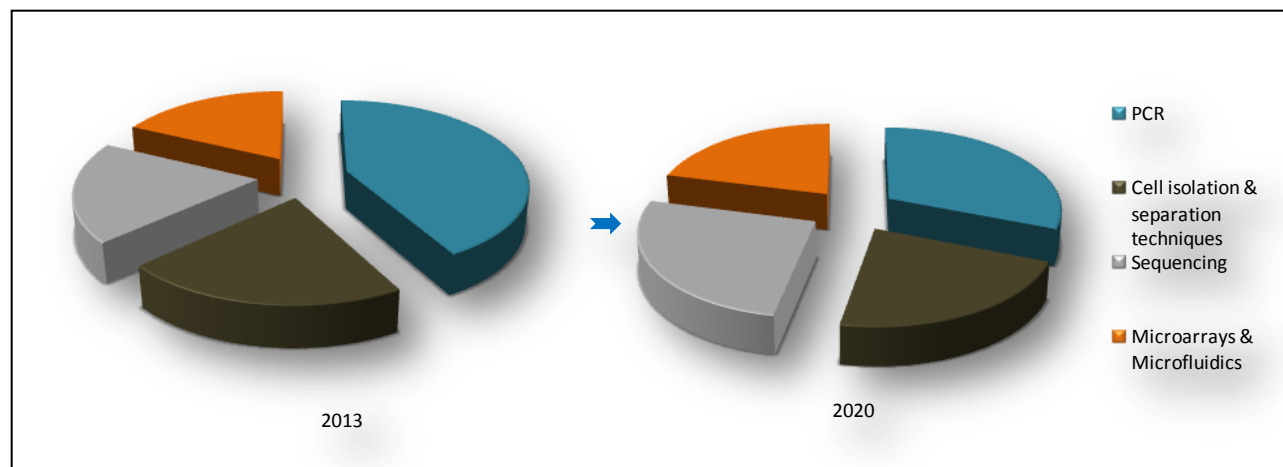
**GLOBAL CELL ANALYSIS APPLICATION MARKET, BY FIELD OUTLOOK
(2013) (\$MN)**



Source: American Genetic Association (AGA), Association of Molecular Pathology (AMP), European Association of Clinical Cell Analysis (EACCA), International Society for Advancement of Cytometry (ISAC), International Society for Stem Cell Research (ISSCR), Microscopy Society of America (MSA), World Health Organization (WHO), Industry expert Interviews, and IQ4I analysis

FIGURE 2

**MOLECULAR APPROACHES CELL ANALYSIS MARKET SHARE,
BY TYPE (2013 V'S 2020) (%)**



Source: American Genetic Association (AGA), Association of Molecular Pathology (AMP), European Association of Clinical Cell Analysis (EACCA), International Society for Advancement of Cytometry (ISAC), International Society for Stem Cell Research (ISSCR), Microscopy Society of America (MSA), World Health Organization (WHO), Industry expert Interviews, and IQ4I analysis

1.1.1.1 RESEARCH SOURCES

TABLE 4

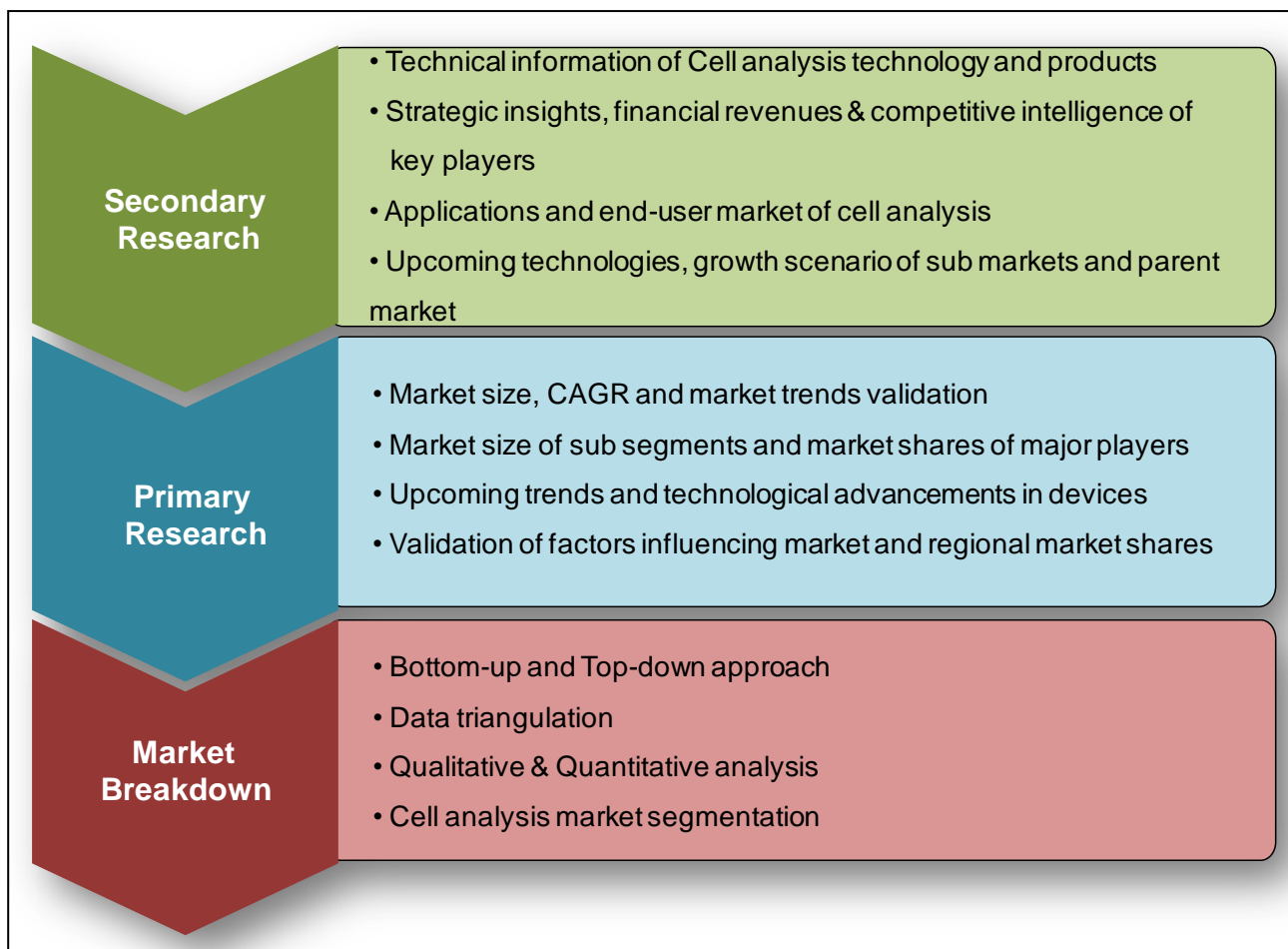
CELL ANALYSIS MARKET: RESEARCH SOURCES

Primary Sources	Secondary Sources
<ul style="list-style-type: none"> • Supply Side: Top-level Executives, Marketing Managers, Sales Managers, Regional Managers • Demand Side: Hospital Medical Directors, Laboratory Managers, Research Scientists, Principal Scientists, Purchase/Procurement Managers, Laboratory Technicians, Academic Research, Pharmaceutical companies, Biotech Laboratories, Clinical Research Organizations (CRO) • Others: Independent Consultants and Freelancers 	<ul style="list-style-type: none"> • IQ4I Repository • Cell Analysis Company-Specific annual reports, SEC filings, corporate presentations & Press releases • Associations and Groups: American Genetic Association (AGA), Associations of Molecular Pathology (AMP), Association of Clinical Research Professionals (ACRP), European Society for Clinical Cell Analysis (ESCCA), International Society for Stem Cell Research (ISSCR), International Society for Advanced Cytometry (ISAC), Microscopy Society of America (MSA), EMEA, EDMA, WHO, and Other Country Associations & Groups • Paid Sources : OneSource, Hoovers, Bloomberg • Social Networking & Databases: LinkedIn, Melt-Water, and Zintro

1.2 RESEARCH METHODOLOGY

FIGURE 3

CELL ANALYSIS MARKET: RESEARCH APPROACH



1.2.1 ASSUMPTIONS

Parameter	Assumptions
Market Revenue	The global cell analysis market revenue is estimated to be ~60% of the global cellular biology market. The value is cross validated through bottom-up approach as well
Market growth	The CAGR for the forecasted period (2014-2020) is assumed to be normalized and the effect of inflation, recession, economic downturn, regulatory or policy changes, or other factors are not considered.
Techniques/ Applications Market	The % splits were arrived for molecular and image based techniques from its respective parent market. Similarly the applications splits were assumed based on the contribution of each technique in respective application area.
Segmental & Sub segmental market shares	The market shares are analysed purely based on the absolute data, in case of the data non availability for the sub markets the parent market trend has been assumed for the forecasted period
Market Share	Market share analysis of key players is performed in two ways that is based on the primary research rankings (Market penetration of players) and the other method is based on the estimated cell analysis products revenues of key players

1.2.2 MARKET SIZE ESTIMATION

The size of the cell analysis global market and its various segments and sub-segments were estimated and validated through secondary and primary research. All the cell analysis market percentage shares, splits, and breakdowns were determined using secondary sources and verified through primary sources to get the final quantitative and qualitative data. This data is consolidated and added with detailed inputs and analysis from IQ4I and presented in this report.

FIGURE 4

CELL ANALYSIS MARKET: TOP-DOWN AND BOTTOM-UP APPROACH

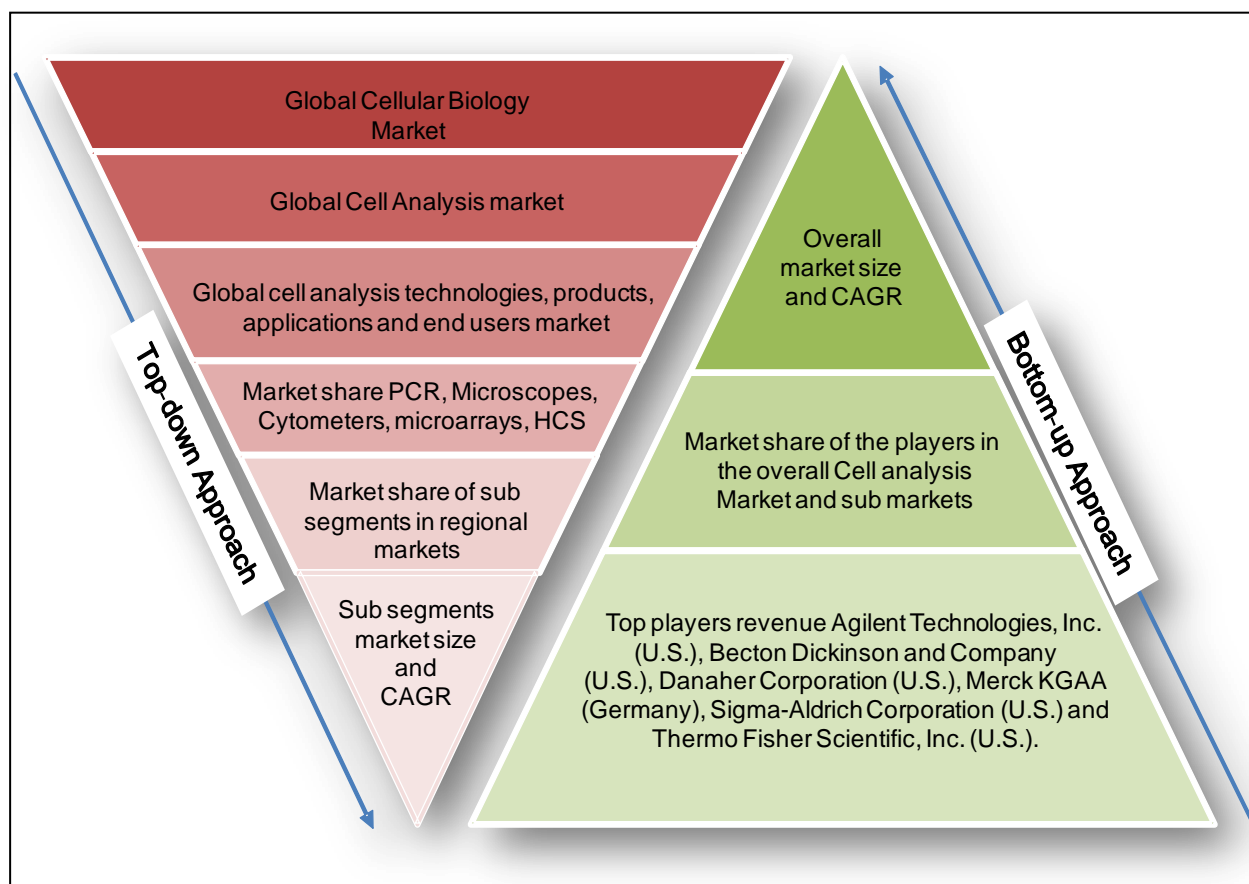
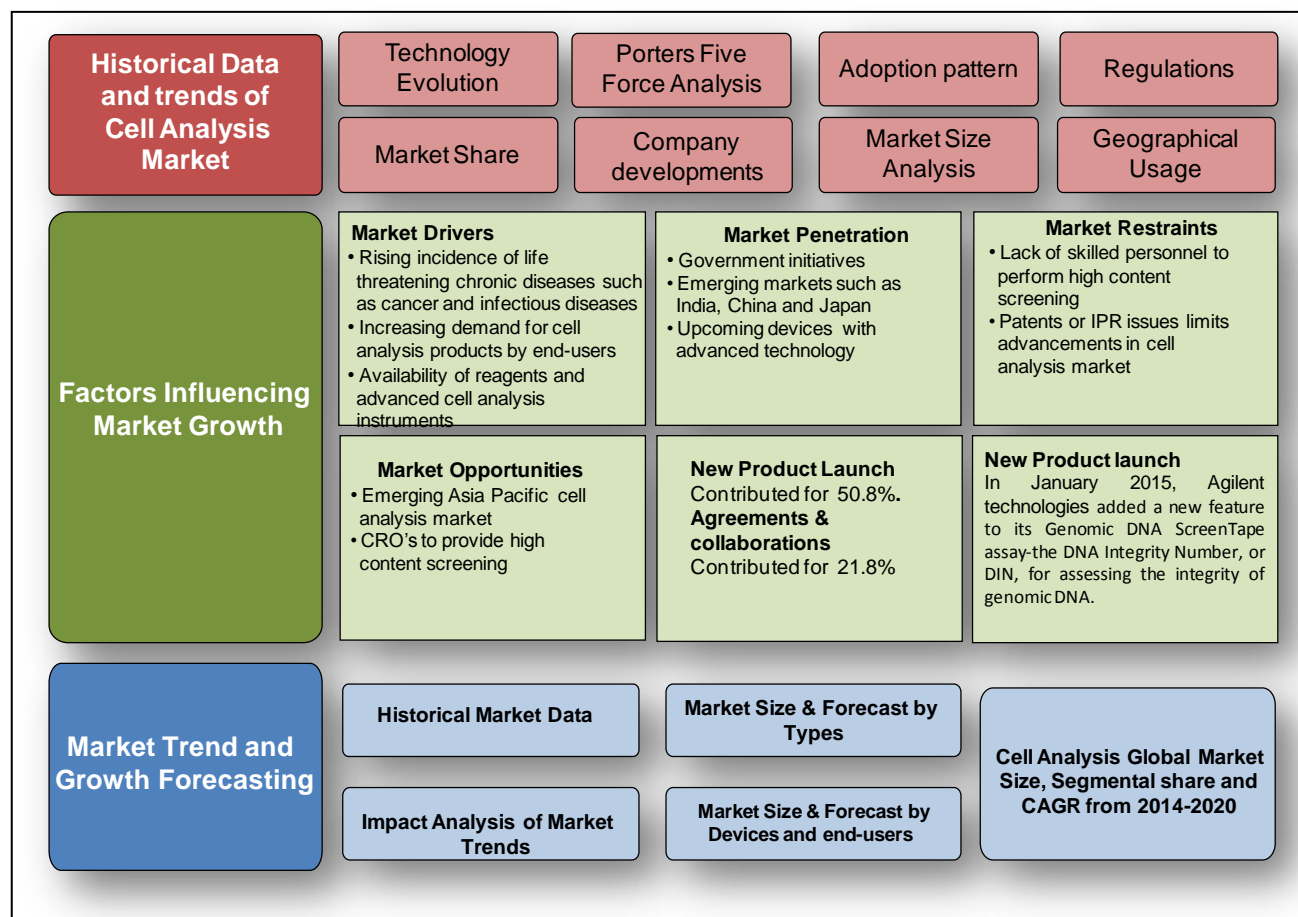


FIGURE 5

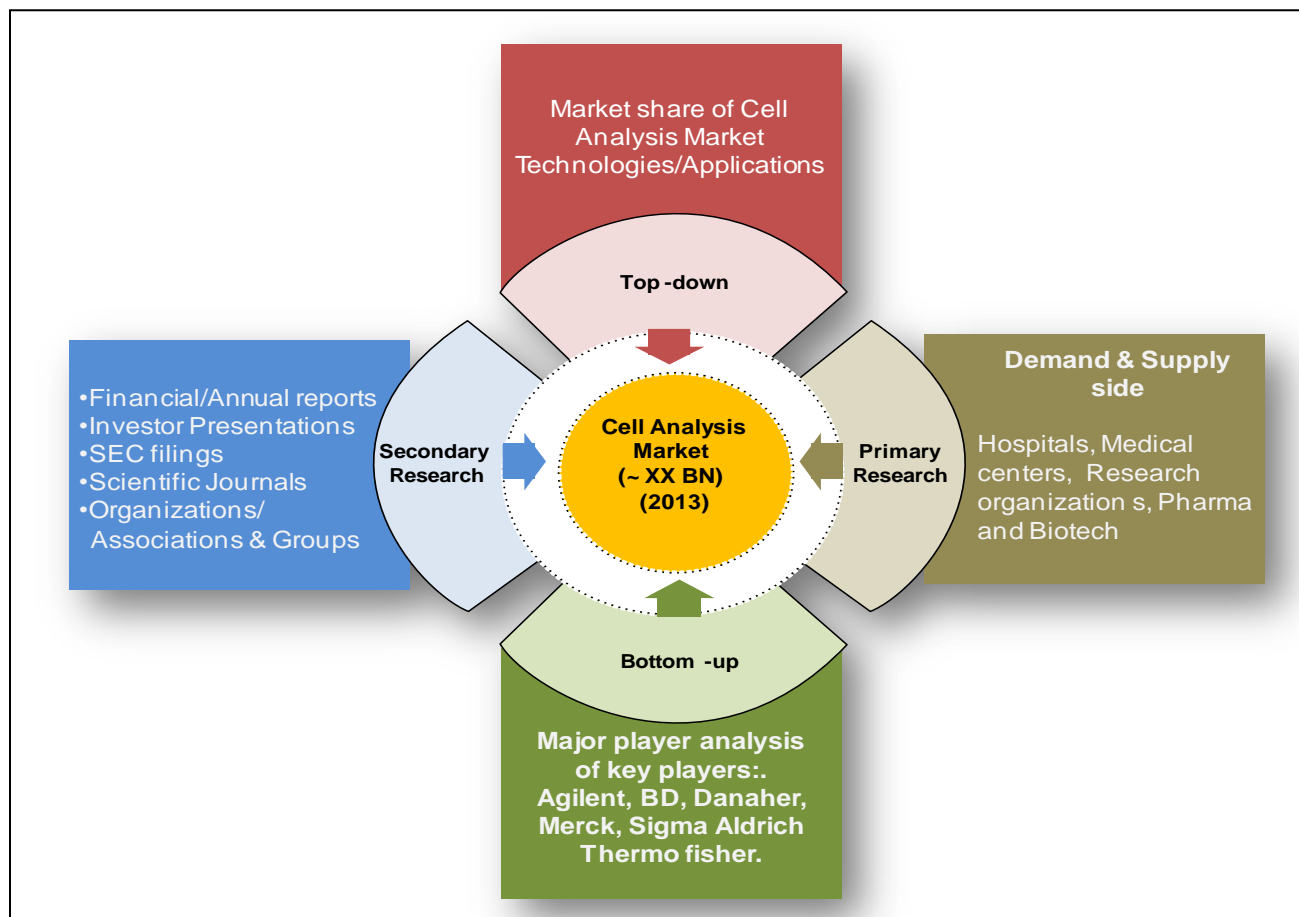
CELL ANALYSIS MARKET: FORECASTING MODEL



1.2.3 MARKET BREAKDOWN & DATA TRIANGULATION

FIGURE 6

CELL ANALYSIS MARKET: MARKET BREAKDOWN & DATA TRIANGULATION



Disclaimer: IQ4I strategic analysis services are limited publications containing valuable market information provided to a select group of customers in response to orders. Our customers acknowledge, when ordering, that IQ4I strategic analysis services are for our customers' internal use and not for general publication or disclosure to third parties. Quantitative market information is based primarily on interviews and therefore, is subject to fluctuation.

IQ4I does not endorse any vendor, product or service depicted in its research publications. IQ4I strategic analysis publications consist of the opinions of IQ4I' research and should not be construed as statements of fact. IQ4I disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

IQ4I takes no responsibility for any incorrect information supplied to us by manufacturers or users.

All trademarks, copyrights and other forms of intellectual property belong to their respective owners and may be protected by copyright. Under no circumstance may any of these be reproduced in any form without the prior written agreement of their owner.

No part of this strategic analysis service may be given, lent, resold or disclosed to non-customers without written permission.

Reproduction and/or transmission in any form and by any means including photocopying, mechanical, electronic, recording or otherwise, without the permission of the publisher is prohibited.

For information regarding permission, contact:

Tel: +91 80 60500229

Email: satish.birudukota@IQ4I.com