

Global Metabolomics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Global Metabolomics Market size is estimated at USD 2.26 billion in 2024, and is expected to reach USD 3.82 billion by 2029, growing at a CAGR of 11.02% during the forecast period (2024-2029).

The market was negatively impacted by the COVID-19 pandemic owing to the low availability of lab reagents, testing kits, and other analytics tools. However, the awareness of the importance of metabolomics among people improved after the pandemic started. To combat the COVID-19 infection, researchers actively started experiments to find more applications of metabolomics.

According to an article published in July 2021, titled 'Metabolomics in the Diagnosis and Prognosis of COVID-19', research on the application of metabolomics in the diagnosis of infectious diseases is accelerated, particularly in respiratory viral infection. This rising adoption rate of metabolomics as a research and development tool is anticipated to drive the metabolomics market. Metabolomics helps analyze diseases and biological processes better and has growing applications in healthcare and drug discovery.

The increasing prevalence of diseases in recent years resulted in a rise in the demand for metabolomics. This has driven the major players in the market to focus on technologically advanced solutions and analytical tools for the end-users. In June 2021, Bruker launched several products to enhance the accuracy of 4D metabolomics and lipidomics workflows, including a new ion source for its Trapped-ion Mobility Spectrometry Time-of-flight (timsTOF) Pro 2 platform. Also, in June 2021, Thermo Fischer Scientific launched the next generation of MS-Based Solutions Orbitrap IQ-X Tribrid mass spectrometer, which is specially designed for small-molecule structural elucidation of metabolites and unknown compounds.

Thus, owing to the above-mentioned factors, the metabolomics market is anticipated to grow over the forecast period.

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Metabolomics Market Trends

Biomarker and Drug Discovery Segment Expected to Generate the Highest Revenue

By application, the biomarkers and drug discovery segment is anticipated to contribute the most to the growth of the studied market. A biomarker is used to see how well the body responds to a treatment for a disease or condition. Hence, they are used primarily in drug discovery.

The incidence of chronic diseases is increasing and generating a demand for new and advanced therapies and treatments. In particular, the increasing cases of cancers are raising awareness of preventive diagnosis, which is a significant factor driving the drug discovery and biomarkers. The application of metabolomics in biomarkers is driving the growth of the market studied.

The incidence of new cancer cases was estimated to be 19,292,789 in 2020, with nearly 9,958,133 deaths due to cancers worldwide, as per GLOBOCAN 2020. The American Cancer Society's Global Cancer Facts estimated that by 2040, the global total is expected to grow to 27.5 million new cancer cases and 16.3 million cancer deaths. As cancer cases are increasing, people undergo advanced tests. Also, the demand for new drug discoveries is increasing. As metabolomics is used to screen potential biomarkers (specific cells, molecules, genes, gene products, enzymes, or hormones) to measure the cancer drug's responsiveness and facilitate early diagnosis, the demand for metabolomics is increasing.

This increasing demand for new and advanced technologies, as well as strategic measures (such as partnerships, collaborations, mergers, acquisitions, and new product launches), is driving the growth of the studied market. For instance, Bruker launched its timsTOF-based MALDI PharmaPulse Solution for Label-free HTS in Drug Discovery. Also, in January 2022, Bruker acquired Prolab Instruments GmbH. This acquisition included Prolab's precision pumps, autosamplers, and nano-flow to cap-LC UHPLC systems planned to enhance the performance and reliability of timsTOF 4D proteomics and metabolomics solutions.

Therefore, owing to the aforementioned factors, the applications of metabolomics in the biomarkers and drug discovery segment is increasing and it is expected to grow over the forecast period.

North America Expected to Dominate the Market

North America is expected to dominate the market during the forecast period due to the presence of many major players, the increased incidence of chronic diseases, and the high adoption of metabolomics applications in healthcare and healthcare technologies. The high per capita healthcare expenditure and the well-established direct sales channels are the primary driving factors of the metabolomics market in the region.

Additionally, the National Institute of Health (NIH) continuously boosts the small and mid-sized metabolomics-oriented research communities and companies in the United States and other regions. This activity by NIH drives the metabolomics applications in healthcare, which is expected to contribute to the growth of the studied market.

The Centre for Disease Control and Prevention (CDC) updated statistics in January 2022, showing that 6 in 10 adults have a chronic disease, while 4 in 10 adults have two or more chronic diseases in the United States. These chronic diseases create healthcare costs of USD 4.3 trillion or more annually. These high number of cases of chronic diseases demand new and advanced treatments or therapies and drug discovery. This is anticipated to increase the applications of metabolomics and propel the studied market growth.

Furthermore, the large number of market players present in the United States and the strategies they make to sustain

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themselves in the market majorly drive the metabolomics market in the region. In January 2022, Diagnostic Solutions Laboratory introduced its new OMX Organic Metabolomics test, which combines organic and amino acid metabolites into one unique report. The OMX test can also evaluate small molecule metabolites that reveal each patient's unique 'Metabolic Signature.' Additionally, in February 2022, Metabolomics, a division of Creative Proteomics, launched the microbial metabolomics service to promote a comprehensive understanding of microbial physiology.

Thus, owing to all the above-mentioned factors, the studied market in North America is expected to witness healthy growth during the forecast period.

Metabolomics Industry Overview

The metabolomics market is moderately competitive and consists of several major players. The major global companies, such as ThermoFisher, Bruker Corporation, and Agilent Technologies, are increasingly collaborating with educational societies and research communities, funding them for more research and providing combination, separation, and detection technique licenses. With the specific requirements of metabolite research, HPLC and UPLC are increasingly preferred over other techniques for their versatile separation methods. Several pharmaceutical companies prefer research institutes to characterize toxicological studies and develop new drugs against infectious diseases. Technical advancements and combinations with MS and NMR are being rapidly adopted globally.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Rising Demand for Personalized Medicines

4.2.2 High Investments by Public and Private Sectors in Metabolomics

4.2.3 Rising Need for Early and Accurate Diagnosis of Diseases

4.3 Market Restraints

4.3.1 High Cost of Tools and Instruments

4.3.2 Lack of Skilled Professionals

4.4 Porter's Five Forces Analysis

4.4.1 Threat of New Entrants

4.4.2 Bargaining Power of Buyers/Consumers

4.4.3 Bargaining Power of Suppliers

4.4.4 Threat of Substitute Products

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4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value, USD million)

5.1 By Metabolite Analysis

5.1.1 Analytical Techniques

5.1.1.1 Separation Techniques

5.1.1.1.1 Liquid Chromatography

5.1.1.1.2 Gas Chromatography

5.1.1.1.3 Capillary Electrophoresis

5.1.1.2 Detection Techniques

5.1.1.2.1 Mass Spectrometry

5.1.1.2.2 Nuclear Magnetic Resonance Spectroscopy

5.1.1.2.3 Other Detection Techniques

5.1.2 Bioinformatics Tools and Databases

5.2 By Application

5.2.1 Biomarker and Drug Discovery

5.2.2 Toxicology

5.2.3 Nutrigenomics

5.2.4 Personalized Medicine

5.2.5 Other Applications

5.3 Geography

5.3.1 North America

5.3.1.1 United States

5.3.1.2 Canada

5.3.1.3 Mexico

5.3.2 Europe

5.3.2.1 Germany

5.3.2.2 United Kingdom

5.3.2.3 France

5.3.2.4 Italy

5.3.2.5 Spain

5.3.2.6 Rest of Europe

5.3.3 Asia-Pacific

5.3.3.1 China

5.3.3.2 Japan

5.3.3.3 India

5.3.3.4 Australia

5.3.3.5 South Korea

5.3.3.6 Rest of Asia-Pacific

5.3.4 Middle-East and Africa

5.3.4.1 GCC

5.3.4.2 South Africa

5.3.4.3 Rest of Middle-East and Africa

5.3.5 South America

5.3.5.1 Brazil

5.3.5.2 Argentina

5.3.5.3 Rest of South America

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6 COMPANY PROFILES AND COMPETITIVE LANDSCAPE

6.1 Company Profiles

6.1.1 Agilent Technologies Inc.

6.1.2 Bio-Rad Laboratories Inc.

6.1.3 Bruker

6.1.4 Danaher (SCIEX)

6.1.5 LECO Corporation

6.1.6 Shimadzu Corporation

6.1.7 Thermo Fisher Scientific

6.1.8 Waters Corporation

6.1.9 PerkinElmer Inc.

6.1.10 Kore Technology

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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