Scientific & Technical Instruments Manufacturing

Description:

Brief Excerpt from Industry Overview Chapter:

Companies in this industry manufacture instruments that are used primarily for laboratory analysis of chemical or physical properties. Major companies include Mettler-Toledo International, PerkinElmer, and Thermo Fisher Scientific (all based in the US), along with Eppendorf (Germany), Oxford Instruments (UK), and JEOL and Shimadzu (Japan).

The global market for scientific instruments is forecast to grow 4% per year through 2019, according to Technavio. Governments of emerging markets including China, Brazil, India, and Taiwan are investing in scientific instruments to increase R&D activity in university, government, and corporate laboratories.

The US scientific and technical instruments manufacturing industry includes about 600 companies with combined annual revenue of about $17 billion.

Competitive Landscape

Demand is driven by spending on laboratory analysis services, scientific research, and other end-user markets. The profitability of individual companies depends on controlling manufacturing costs and maintaining continuous, rapid product innovation cycles. Large companies enjoy economies of scale in sourcing material components and product distribution. Small companies can compete by specializing in instruments for niche markets or by developing a reputation for high-quality products. The US industry is highly concentrated: the largest 50 companies account for about 80% of revenue.

Products, Operations & Technology

Major products include chromatographic instruments, mass spectrometers, pH meters, and thermal analysis systems. Companies in this industry may also produce software used for data collection and analysis, as well as pipettes, reagents, and other laboratory consumables. These products are used to analyze the chemical or physical properties.

Contents:

- Industry Overview
- Quarterly Industry Update
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