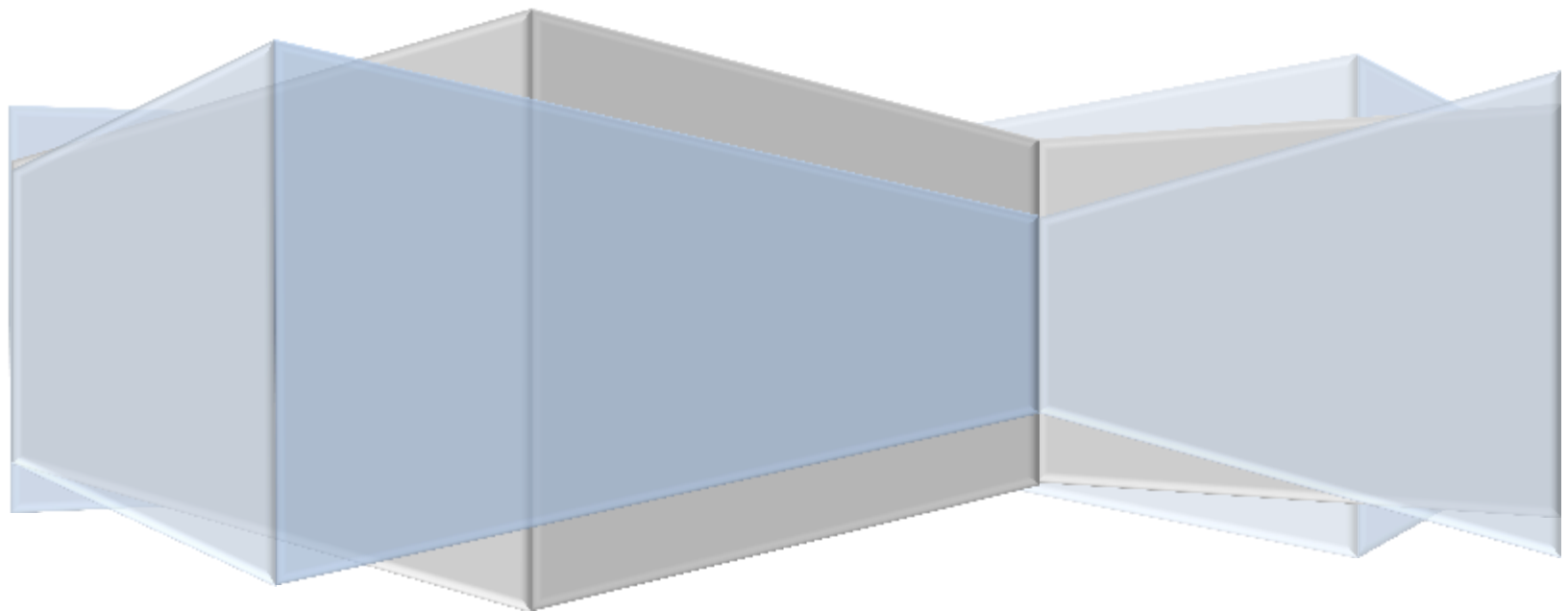


PAI/2018

The Process Analytical Instrument Market

May-2018





NOTICE

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PREFACE

PAI/2018 report is a product of a collaboration between PAI Partners and Top-Down Analytics (TDA). **PAI Partners**, the original authors of the *PAI series*, consists of Terry McMahon (deceased February 2018), Steve Walton, and Jim Tatera. McMahon authored over a dozen market studies from 1973-1991 that covered process analytical instruments as well as *PAI/94* published by PAI Partners in 1995. Walton was the principal author of DMCW's *PCM Update: Analytical & Specialty Measurement Equipment* published in 1996. Since the late 1990s, McMahon and Walton have collaborated in producing *PAI/2000*, *PAI/2004*, *PAI/2008*, *PAI/2012*, and *PAI/2016*. Jim Tatera is the third principal author of the *PAI* market reports. With nearly 30 years as a leading analyzer professional for Dow Corning, Jim brings a strong end-user focus to this and earlier editions (*PAI/2008*, *PAI/2012*, *PAI/2016*).

Top-Down Analytics (TDA) is a management consulting firm focused on providing strategic services for scientific technology companies for lab and process applications. TDA conducts primary and secondary market research following trends for scientific products, chemicals/reagents, consumables and instrumental and automation techniques. TDA was founded in 2016 by Glenn Cudiamat, who has been conducting market research for over two decades in the specialized field of laboratory analytical and life science instrumentation. Cudiamat has worked with nearly every major analytical instrumentation manufacturer in North America, Europe and Japan.

Principals of TDA and PAI Partners developed all estimates of market size and growth, market share and related market data presented herein. *PAI/2018* adheres to the product and market definitions established in the five previous editions while exploring new topical issues. Expanding niches for laser-based optical spectroscopy and expanding service opportunities are analyzed while revisiting and updating initiatives including QbD/PAT and NeSSI from earlier editions. Market impacts from Industrie 4.0 have also influenced the findings presented in this update edition. The company index listing of over 450 current and legacy names indicates the scope of our research. A discussion of evolving international process analyzer standards is another important feature.

Our continuing goal is to illustrate and quantify this market opportunity. The next edition of this report is scheduled to be published in 2020. In addition, TDA and PAI Partners offer consulting services to clients with specific requirements on a private basis. Top-down, strategic services include acquisition and divestiture support, diversification measures and opportunity analyses, and strategy development.

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