

CHAPTER ONE: INTRODUCTION.....	1
STUDY GOALS AND OBJECTIVES.....	1
REASONS FOR DOING THIS STUDY.....	1
SCOPE AND FORMAT.....	1
METHODOLOGY AND INFORMATION SOURCES.....	2
INTENDED AUDIENCE.....	2
ANALYST CREDENTIALS.....	2
RELATED REPORTS.....	3
BCC ONLINE SERVICES.....	3
DISCLAIMER.....	3
 CHAPTER TWO: SUMMARY.....	 4
<i>SUMMARY TABLE GLOBAL MARKET FOR SAMPLE PREPARATION REAGENTS AND PRODUCTS USED IN LIFE SCIENCE RESEARCH BY SEGMENT, THROUGH 2016 (\$ MILLIONS)</i>	 5
<i>SUMMARY FIGURE GLOBAL MARKET FOR SAMPLE PREPARATION REAGENTS AND PRODUCTS USED IN LIFE SCIENCE RESEARCH BY SEGMENT, 2009–2016 (\$ MILLIONS)</i>	 5
 CHAPTER THREE: INTRODUCTION TO THE SAMPLE PREP MARKET.....	 6
OVERVIEW.....	6
<i>TABLE 1 GLOBAL MARKET FOR COMMON REAGENTS AND PRODUCTS IN THE LIFE SCIENCE TOOLS INDUSTRY BY SEGMENT, THROUGH 2016 (\$ BILLIONS)</i>	 7
<i>FIGURE 1 GENOME AND GENE ANALYSIS WORKFLOW</i>	8
<i>FIGURE 2 PROTEIN ANALYSIS WORKFLOW</i>	9
MAJOR TRENDS AND DRIVERS IN THE SAMPLE PREP SEGMENT OF LIFE SCIENCE TOOLS INDUSTRY.....	9
BIOMARKER RESEARCH AND DIAGNOSTICS INDUSTRY.....	9
INNOVATIVE TECHNOLOGIES AND SCIENTIFIC TRENDS.....	10
Next-Generation Sequencing.....	10
Scientific Trends.....	10
Stem Cell Research.....	10
Epigenomic Research.....	11
GOVERNMENT POLICIES AND FUNDING.....	11
MAIN MARKET PARTICIPANTS IN THE SAMPLE PREP INDUSTRY.....	11
MAIN MARKET PARTICIPANTS IN ... (CONTINUED).....	12
<i>TABLE 2 GLOBAL MARKET SHARES OF THE SAMPLE PREP INDUSTRY BY LIFE SCIENCE RESEARCH SEGMENT, 2011 (%)</i>	 13
GEOGRAPHIC DISTRIBUTION OF THE SAMPLE PREP MARKET.....	13
<i>TABLE 3 GLOBAL MARKET SHARES OF THE SAMPLE PREP INDUSTRY BY GEOGRAPHIC REGION, 2011 (%)</i>	 14
TECHNOLOGY PATENTS IN THE SAMPLE PREP INDUSTRY.....	14

TECHNOLOGY PATENTS IN THE ... (CONTINUED).....	15
TECHNOLOGY PATENTS IN THE ... (CONTINUED).....	16
CHAPTER FOUR: SAMPLE PREPARATION PRODUCTS FOR GENOMICS	
RESEARCH	17
OVERVIEW	17
GENOMICS STUDIES AS A MARKET FOR THE LIFE SCIENCE	
TOOLS AND SAMPLE PREPARATION INDUSTRIES	18
<i>TABLE 4 GLOBAL MARKET FOR GENOMICS PRODUCTS, THROUGH</i>	
<i>2016 (\$ BILLIONS)</i>	19
PRODUCTS FOR SAMPLE PREPARATION IN GENOMICS.....	19
NUCLEIC ACID EXTRACTION/PURIFICATION MARKET	20
Overview	20
Magnetic Bead Based Nucleic Acid Purification	21
Anion Exchange Approach for Nucleic Acid Purification	22
All-in-One Application Products	23
Nucleic Acid Extraction Market Evaluation	23
<i>TABLE 5 GLOBAL MARKET VALUE OF NUCLEIC ACID</i>	
<i>EXTRACTION PRODUCTS, THROUGH 2016 (\$ MILLIONS)</i>	23
Main Participants in the Nucleic Acid Extraction Market	24
<i>TABLE 6 NUCLEIC ACID MARKET SHARES BY COMPANY, 2011, (%)</i>	25
Primary Types End Users in the Nucleic Acid Preparation	
Market	25
<i>TABLE 7 DISTRIBUTION OF THE NUCLEIC ACID PREPARATION</i>	
<i>MARKET BY TYPE OF END USER, 2011 (%)</i>	26
<i>TABLE 8 GEOGRAPHIC DISTRIBUTION OF THE NUCLEIC ACID</i>	
<i>PREPARATION MARKET, 2011 (%)</i>	26
SPECIFIC NICHEs AND SUBMARKETS IN THE NUCLEIC	
ACID ISOLATION MARKET.....	27
RNA Extraction and Purification Products	27
RNA Extraction and ... (Continued)	28
<i>TABLE 9 GLOBAL MARKET SHARES OF RNA ISOLATION</i>	
<i>PRODUCTS BY COMPANY, 2011 (%)</i>	29
miRNA as a New Trend in Research Tools Development	
and Nucleic Acid Purification Market	30
Formalin Fixed Paraffin-Embedded Tissues as a	
Submarket of the Nucleic Acid Purification Market	31
<i>TABLE 10 SELECT COMPANIES PROVIDING PRODUCTS FOR FFPE</i>	
<i>NUCLEIC ACID EXTRACTION</i>	32
Market for Nucleic Acid Extraction from Biological	
Samples.....	33
Market for Nucleic Acid Extraction ... (Continued)	34
Nucleic Acid Extraction from Difficult Samples (Plants,	
Fungi, Yeast)	35

INNOVATIVE TECHNOLOGIES IN THE NUCLEIC ACID PURIFICATION MARKET	35
Cell Lysis and Expression Analysis without Isolating RNA.....	35
Single-Cell Analysis.....	36
Quantification of Dried Blood Spots	36
Specialized Applications	36
AUTOMATION ASPECT OF THE NUCLEIC ACID PREPARATION MARKET	37
TABLE 11 <i>DISTRIBUTION OF AUTOMATION DEVICES FOR NUCLEIC ACID PURIFICATION BY TYPE OF END USER, 2011 (%)</i>	38
TABLE 12 <i>COMPANIES THAT PROVIDE NUCLEIC ACID SAMPLE PREPARATION PLATFORMS</i>	38
TABLE 12 <i>(CONTINUED)</i>	39
SUMMARY OF THE NUCLEIC ACID EXTRACTION MARKET	40
TABLE 13 <i>AVERAGE PRICES OF NUCLEIC ACID PURIFICATION UNITS OFFERED BY REPRESENTATIVE COMPANIES, 2011 (\$)</i>	41
SAMPLE PREPARATION FOR DNA AMPLIFICATION AND POLYMERASE CHAIN REACTION	41
OVERVIEW	41
TABLE 14 <i>GLOBAL DNA AMPLIFICATION/PCR MARKET, THROUGH 2016 (\$ BILLIONS)</i>	42
TABLE 15 <i>GLOBAL RT-PCR MARKET SHARES BY COMPANY, 2011 (%)</i>	43
TABLE 16 <i>GLOBAL PCR MARKET SHARES BY GEOGRAPHIC REGION, 2011 (%)</i>	44
NEW TRENDS AND DEVELOPMENTS IN THE PCR MARKET	44
Digital PCR Trend	44
Direct PCR	45
SAMPLE PREPARATION PRODUCTS IN THE PCR MARKET	46
TABLE 17 <i>SAMPLE PREPARATION MARKET ESTIMATE FOR PCR APPLICATIONS, THROUGH 2016 (\$ MILLIONS)</i>	46
Sample Preparation Products In ... (Continued)	47
Sample Preparation Products In ... (Continued)	48
SAMPLE PREPARATION MARKET FOR SEQUENCING APPLICATIONS	49
SEQUENCING IN THE RESEARCH TOOLS MARKET	49
Sequencing in the Research ... (Continued)	50
TABLE 18 <i>GLOBAL MARKET FOR DNA SEQUENCING, THROUGH 2016 (\$ BILLIONS)</i>	51
TABLE 19 <i>GLOBAL MARKET FOR NGS AND GENERAL SEQUENCING, THROUGH 2016 (\$ BILLIONS)</i>	52
Sequencing in the Research ... (Continued)	53

<i>TABLE 20</i>	<i>NGS MARKET SHARES BY COMPANY, 2011 (%)</i>	54
	SAMPLE PREPARATION FOR NGS EVOLVES AS A COMPETITIVE MARKET.....	54
	Overview	54
<i>TABLE 21</i>	<i>CRITERIA FOR CHOOSING A SPECIFIC VENDOR FOR SAMPLE PREP IN NGS ACCORDING TO PRIORITY (%)</i>	55
<i>TABLE 22</i>	<i>VALUE OF NGS FOR THE SAMPLE PREP MARKET THROUGH 2016 (\$ MILLIONS)</i>	56
	Drivers and Challenges for the Sample Preparation Industry in NGS	56
<i>TABLE 23</i>	<i>RECENT ACQUISITIONS AND COLLABORATIONS IN THE NGS SAMPLE PREP INDUSTRY, 2011</i>	57
	SAMPLE PREPARATION PRODUCTS FOR CLONING AND DNA ASSEMBLY.....	58
	OVERVIEW	58
<i>TABLE 24</i>	<i>MARKET ESTIMATION FOR SAMPLE PREPARATION IN MOLECULAR CLONING, THROUGH 2011 (\$MILLIONS)</i>	59
	SYNTHETIC BIOLOGY TREND AS A POSITIVE DRIVER IN THE SAMPLE PREPARATION MARKET	60
	Synthetic Biology Trend as a ... (Continued)	61
	ADDITIONAL TARGET SUB-MARKETS FOR SAMPLE PREPARATION PRODUCTS FOR GENOMICS.....	62
	DNA MICROARRAYS.....	62
<i>TABLE 25</i>	<i>GLOBAL MARKET FOR DNA MICROARRAYS, THROUGH 2016 (\$ BILLIONS)</i>	62
	RNA RESEARCH AND ITS SAMPLE PREPARATION MARKET	63
	Overview	63
	RNA Products	63
	RNA Extraction Purification Kits.....	64
	RNA Synthesis, Degradation, and Modification Products	64
<i>TABLE 26</i>	<i>SELECT RNA SYNTHESIS, DEGRADATION, AND MODIFICATION PRODUCTS</i>	64
	RNA Interference.....	64
<i>TABLE 27</i>	<i>GLOBAL RNA INTERFERENCE MARKET THROUGH 2016 (\$ MILLIONS)</i>	65
	RNA Interference	66
CHAPTER FIVE:	SAMPLE PREP PRODUCTS FOR EPIGENOMICS	67
	OVERVIEW.....	67
<i>TABLE 28</i>	<i>GLOBAL MARKET FOR DRUG DISCOVERY IN EPIGENOMIC RESEARCH, 2011–2016 (\$ BILLIONS)</i>	67
	EPIGENOMIC RESEARCH TOOLS AND PRODUCTS, INCLUDING THE SAMPLE PREPARATION MARKET	68

<i>TABLE 29 SELECT EPIGENOMIC PRODUCTS BY SUPPLIER</i>	68
DNA Methylation Research and Sample Preparation Products	68
DNA Methylation Research and ... (Continued)	69
Histone Methylations and Modifications and Sample Preparation Products	70
<i>TABLE 30 SELECT EPIGENOMIC SAMPLE PREPARATION PRODUCTS BY SUPPLIER</i>	71
MARKET FOR EPIGENOMICS REAGENTS AND SAMPLE PREPARATION TOOLS.....	71
<i>TABLE 31 PERCENTAGE OF COMMERCIAL KITS GENERALLY PURCHASED FOR EPIGENOMIC RESEARCH BY PRODUCT TYPE</i>	72
<i>TABLE 32 GLOBAL MARKET RESEARCH TOOLS IN THE EPIGENOMIC SEGMENT, THROUGH 2016 (\$ BILLIONS)</i>	73
ESTIMATED MARKET POTENTIAL FOR NEW EPIGENOMICS PRODUCTS.....	73
<i>TABLE 33 DISTRIBUTION OF EPIGENOMIC PRODUCTS IN THE U.S. SAMPLE PREPARATION INDUSTRY BY TYPE OF END USER, 2011 (%)</i>	74
 CHAPTER SIX: PROTEOMICS RESEARCH AS A MARKET FOR THE SAMPLE PREPARATION INDUSTRY	
OVERVIEW	75
<i>TABLE 34 GLOBAL MARKET FOR PROTEOMICS TOOLS, THROUGH 2016 (\$ BILLIONS)</i>	76
PROTEIN EXPRESSION AS A TARGET MARKET FOR SAMPLE PREPARATION PRODUCT DEVELOPMENT	77
Overview	77
<i>TABLE 35 PERCENTAGE USE OF SPECIFIC PROTEIN EXPRESSION TECHNIQUES, 2011 (%)</i>	77
Prokaryotic Expression Systems.....	78
Mammalian Expression Systems.....	78
Protein Expression in Insect Cell Systems.....	79
Protein Expression in Yeast Cell Systems	79
Protein Expression in Plant Cell Systems.....	79
Cell-Free Systems.....	80
PROTEIN EXPRESSION AND SAMPLE PREPARATION MARKET PARTICIPANTS	80
<i>TABLE 36 PROTEIN EXPRESSION MARKET SHARES BY COMPANY, 2011 (%)</i>	81
SAMPLE PREPARATION AND THE PROTEIN PURIFICATION MARKET	81
Overview	81
Extraction, Cell Lysis Procedure, and Protein Solubilization.....	82

Protein Purification: Precipitation and Differential Solubilization.....	83
Protein Purification: Chromatographic Methods	84
Size Exclusion Chromatography	84
Separation Based on Charge or Hydrophobicity	84
Affinity Chromatography	84
Immunoaffinity Chromatography	85
High-Performance Liquid Chromatography.....	85
<i>TABLE 37 GLOBAL MARKET FOR PROTEIN CHROMATOGRAPHY, THROUGH 2016 (\$ MILLIONS)</i>	<i>86</i>
<i>TABLE 38 AVERAGE SPENDING PER SCIENTIST ON PURIFICATION/SEPARATION PRODUCTS (\$)</i>	<i>87</i>
SAMPLE PREPARATION FOR PROTEIN IDENTIFICATION AND CHARACTERIZATION TECHNIQUES.....	88
Mass Spectrometry	88
<i>TABLE 39 GLOBAL MARKET FOR MASS SPECTROMETRY, THROUGH 2016 (\$ MILLIONS)</i>	<i>88</i>
Mass Spectrometry (Continued).....	89
Protein Sequencing Approach	90
ICAT	90
MudPit	91
X-ray Crystallography	91
Protein NMR.....	92
<i>TABLE 40 PERCENTAGE OF TOTAL NMR APPLICATIONS IN VARIOUS SECTORS, 2011 (%)</i>	<i>92</i>
ADDITIONAL RESEARCH TOOLS IN PROTEOMICS STUDIES AND THEIR SAMPLE PREPARATION PRODUCTS.....	93
Two-Dimensional Gel Electrophoresis and Its Alternatives	93
<i>TABLE 41 GLOBAL MARKET FOR 2D GEL ANALYSIS, THROUGH 2016 (\$ MILLIONS)</i>	<i>93</i>
<i>TABLE 42 EXAMPLES OF 2D GEL SAMPLE PREPARATION PRODUCTS BY COMPANY, 2011 (\$)</i>	<i>94</i>
Protein-Protein Interaction Identification Techniques.....	95
Protein Microarrays.....	96
<i>TABLE 43 GLOBAL PROTEIN CHIP MARKET, THROUGH 2016 (\$ MILLIONS)</i>	<i>97</i>
GENERAL MARKET OVERVIEW FOR SAMPLE PREPARATION IN PROTEOMICS RESEARCH	98
<i>TABLE 44 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN PROTEOMICS, THROUGH 2011 (\$ MILLIONS)</i>	<i>98</i>
Market Participants in Proteomics Sample Preparation.....	99

<i>TABLE 45 CATEGORIES IN THE SAMPLE PREPARATION MARKET FOR PROTEOMICS RESEARCH AND EXAMPLES OF MARKET PARTICIPANTS</i>	100
<i>TABLE 46 EXAMPLES OF SAMPLE PREPARATION SERVICES FOR PROTEOMICS RESEARCH AND THEIR AVERAGE COST (\$)</i>	100
<i>TABLE 47 DISTRIBUTION OF THE PROTEOMICS SAMPLE PREPARATION MARKET BY TYPE OF END USER, 2011 (%)</i>	101
CHAPTER SEVEN: LABELING AND PROBES IN THE SAMPLE PREP MARKET	102
OVERVIEW	102
LABELING	102
FLUORESCENT LABELING	102
CHEMILUMINESCENT LABELING	102
RADIOACTIVE LABELING	102
<i>TABLE 48 GLOBAL MARKET FOR VARIOUS LABELING AND PROBES, 2011 (\$ BILLIONS)</i>	103
LABELING AND PROBES FOR GENOMICS STUDIES	103
LABELING AND PROBES FOR PROTEOMICS STUDIES	104
LABELING AND PROBES FOR ... (CONTINUED)	105
CHAPTER EIGHT: SAMPLE PREPARATION FOR THE CELL BIOLOGY REAGENTS MARKET	106
OVERVIEW	106
<i>TABLE 49 GLOBAL MARKET FOR CELL BIOLOGY REAGENTS, THROUGH 2016 (\$ BILLIONS)</i>	106
<i>TABLE 50 GLOBAL MARKET SHARES OF CELL BIOLOGY REAGENTS BY PRODUCT CATEGORY (%)</i>	107
SAMPLE PREPARATION PRODUCTS AND SERVICES IN THE CELL BIOLOGY SEGMENT	107
Cell Isolation, Maintenance, and Banking	107
Flow Cytometry Sample Preparation	108
<i>TABLE 51 GLOBAL MARKET FOR FLOW CYTOMETRY, THROUGH 2016 (\$ BILLIONS)</i>	109
Genetic Cell Identification	109
<i>TABLE 52 U.S. MARKET FOR STEM CELL RESEARCH TOOLS, THROUGH 2016 (\$ BILLIONS)</i>	110
Genetic Cell Identification (Continued)	111
<i>TABLE 53 REPRESENTATIVE PRICING FOR SAMPLE PREPARATION SERVICES IN CELL BIOLOGY (\$)</i>	112
CHAPTER NINE: GLOBAL TARGET MARKETS FOR SAMPLE PREPARATION BY APPLICATION	113
OVERVIEW	113
FOOD SAFETY TESTING	113

TABLE 54 MARKET VALUE OF FOOD SAFETY TESTING FOR PATHOGENS IN THE U.S. THROUGH 2016 (\$ BILLIONS).....	114
ANIMAL HEALTH DIAGNOSTICS	115
TABLE 55 GLOBAL MARKET VALUE OF ANIMAL HEALTH TESTING, THROUGH 2016 (\$ MILLIONS).....	115
FORENSICS AS A TARGET MARKET FOR THE SAMPLE PREPARATION INDUSTRY	116
TABLE 56 U.S. MARKET FOR DNA TESTING SERVICES AND PRODUCTS IN THE FORENSICS INDUSTRY, 2010 (\$ MILLIONS).....	117
BIODEFENSE AS A DRIVER MARKET FOR THE SAMPLE PREPARATION INDUSTRY	118
TABLE 57 HEALTH AND HUMAN SERVICES DEPARTMENTAL BUDGETS, 2010 (\$ MILLIONS).....	118
BIODEFENSE AS A DRIVER MARKET...(CONTINUED)	119
CHAPTER TEN: MARKET SUMMARY	120
OVERVIEW.....	120
TABLE 58 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN GENOMICS, THROUGH 2016 (\$ MILLIONS)	120
FIGURE 3 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN GENOMICS, 2009–2016 (\$ MILLIONS)	121
TABLE 59 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN EPIGENOMICS, THROUGH 2016 (\$ BILLIONS).....	122
FIGURE 4 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN EPIGENOMICS, 2009–2016 (\$ BILLIONS).....	122
TABLE 60 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN PROTEOMICS, THROUGH 2016 (\$ MILLIONS).....	123
FIGURE 5 MARKET ESTIMATE FOR SAMPLE PREPARATION PRODUCTS IN PROTEOMICS, 2009–2016 (\$ MILLIONS).....	123
TABLE 61 MARKET SHARE OF GENOMICS VS. PROTEOMICS SAMPLE PREP PRODUCTS BY TYPE OF END USER, 2011 (%).....	124
MARKET PARTICIPANTS	124
TABLE 62 MAIN MARKET PARTICIPANTS IN THE SAMPLE PREPARATION INDUSTRY FOR LIFE SCIENCE RESEARCH.....	125
TABLE 62 (CONTINUED).....	126
TABLE 62 (CONTINUED).....	127
CHAPTER ELEVEN: SELECTED PROFILES OF COMPANIES.....	128
PROFILES.....	128
AGILENT TECHNOLOGIES	128
GE HEALTHCARE U.K., LTD.	129
ILLUMINA, INC.	130
LIFE TECHNOLOGIES CORP.	131
NORGEN BIOTEK.....	132
PROMEGA CORP.	133

SIGMA-ALDRICH CORP.	134
THERMO FISHER SCIENTIFIC, INC.	135
QIAGEN.....	136
LIST OF COMPANIES.....	136
LIST OF COMPANIES (CONTINUED)	137
LIST OF COMPANIES (CONTINUED)	138
LIST OF COMPANIES (CONTINUED)	139
LIST OF COMPANIES (CONTINUED)	140
LIST OF COMPANIES (CONTINUED)	141
LIST OF COMPANIES (CONTINUED)	142
LIST OF COMPANIES (CONTINUED)	143
LIST OF COMPANIES (CONTINUED)	144
LIST OF COMPANIES (CONTINUED)	145
LIST OF COMPANIES (CONTINUED)	146