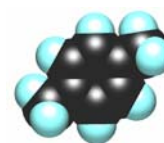
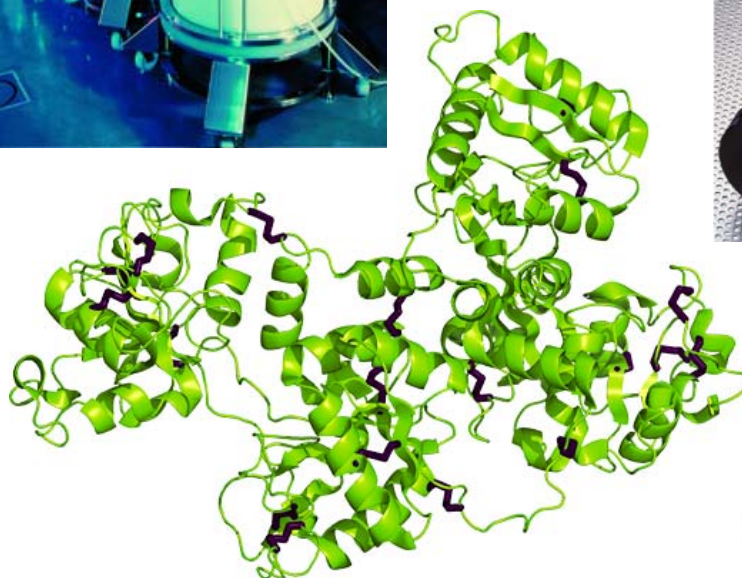


February 2010

# Purification Chromatography: Rapid Development for Evolving Needs



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Market Forecast  
**2010-2014**

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## Major Competitors Covered

- Agilent
- Akzo Nobel/Eka Chemicals
- Axens (IFP)
- Bio-Rad
- Biotage
- Daicel/Chiral Technologies
- Dow (incl. Rohm & Haas)
- EMD/Merck KGaA
- GE Healthcare
- Gilson
- Honeywell (UOP, B&J)
- ISCO (Teledyne)
- Knauer
- Mallinckrodt-Baker (Covidien)
- Millipore
- Novasep
- Outotec
- Pall
- Phenomenex
- ProMetic Biosciences
- Sartorius
- Shimadzu
- Shodex (Showa Denko)
- Sigma-Aldrich/Supelco
- Thermo Fisher Scientific
- Tosoh Bioscience
- Upfront Chromatography
- W.R. Grace
- Waters (incl. Thar)
- Varian (Agilent)
- YMC

The application of chromatography for the separation and purification of a wide variety of products has been practiced for well over a century. While the earliest forms of purification chromatography may barely be recognizable today, modern versions of the method have been widely used for decades as the technology has continuously improved and evolved. Today the purification chromatography market is worth nearly \$2.4 billion worldwide, and continues to be driven by the development and refinement of preparative and industrial chromatography techniques in an attempt to meet the needs of end-users in a variety of industries.

Most people in the scientific community think of the pharmaceutical and biopharmaceutical industry when the term chromatography is mentioned, and rightly so. The development and production of biological compounds accounts for the largest area of demand for purification chromatography, and will be the primary market driver far out into the future. But other industries make up critical segments of the market, including the sugar and sweeteners industry, petroleum, and nutraceuticals.

While conventional batch chromatography methods continue to account for the core of the purification chromatography market, techniques such as flash chromatography, supercritical fluid chromatography (SFC) and simulated moving bed (SMB) chromatography have all had major impacts on the market. The most recent new technology, single-use chromatography, is the latest revolutionary technique to impact the market.

This report profiles the purification chromatography market in terms of products, competitors, industrial demand and regional demand, and how the shape of the market will evolve over the coming years. The results of the included end-user survey provides customer insights, and the sections on the installed base, historical demand and competitive positioning provide even more perspectives on this market.

### This Report Provides...

- Current market demand (2009) for all purification chromatography technologies, including preparative & industrial HPLC & LPLC, flash chromatography, SFC, SMB and single-use chromatography.
- Market Forecasts (2009-2014) by:
  - Product
  - Industry
  - Region
- Current Drivers of the Purification Chromatography Industry.
- Market Shares for Major Technology Groups.
- End-User Survey Results.
- More than 240 pages of background information, market estimates, graphs and tables.

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