

## Diagnostics Business Gets Bigger

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- **Roche consolidates.**
- **Diagnostics business crosses Rs 600 crore**
- **Pharma companies moving away from diagnostics trading.**
- **Biosuppliers to carry diagnostics products.**
- **Diagnostics sector to get special attention.**

With over 50 companies in the diagnostics business, the diagnostics business in 2004-05 is estimated to be Rs 602 crore. This business has been witness to several interesting trends. While Roche Diagnostics consolidated its business, after the alliance with Nicholas Piramal ended, new companies like Cancer Genetics (Genetics Specialties) have set up shop in India. Further, companies like BioRad are making good progress with their diagnostics business. BioRad's total diagnostics products business in 2004-05 was Rs 18 crore. Further, pharma companies like Dr Reddy's that were trading diagnostics products have moved away from this line of business.

Roche Diagnostics is the clear leader in this market place with estimated revenues of Rs 150 crore. TransAsia Biomedicals and Goa-based Tulip Group are the two very big players, both accounting for nearly Rs 185 crore of business in 2004-05. Span Diagnostics is another Indian manufacturer, which registered close to 38 percent growth in it sales over that in 2003-04 and closed the year at Rs 49 crore. In 2004, there were about 25 companies manufacturing diagnostic kits in India. These companies have been manufacturing and selling kits mainly in the areas of pregnancy, ovulation, estimation of T3, T4 & TSH, HIV, HBV and HCV infection, rheumatoid diseases and disorders, cancer (cervix, colon, prostate, lung and mouth etc.), kidney function and liver function.

The total Indian diagnostics market in 2004-05 accounted for 16.5 percent of the total biopharmaceutical sector sales and saw almost a 48 percent jump in revenues during 2004-05 compared to that in the previous year. The market can be categorized into two major categories-one being reagents and allied business and the other being the instruments business. The figures mentioned above include mostly the kits and reagents and not the instrumentation. The instruments market is much bigger and we included that business in the life science suppliers' market estimates.

Rank	Company	Sales in Rs Crore	
		2003-04	2004-05
1	Roche Diagnostics	NA	150
2	TransAsia	78.01	94.5
3	Bayer Diagnostics	55.5	64.61
4	Span Diagnostics	35.62	49
5	Nicholas Piramal	77	35.7
6	Orion	22.9	28.71
7	Tulip Diagnostics	19.6	21.5
8	Zeephyr Biomedicals	7.99	18.98
9	BioRAD	NA	18
10	Lilac	11	15.86
Top 10		307.62	495.96
Others		99.43	105.84
TOTALS		407.05	601.8