

CONSUMABLES KEEP UP THE PACE

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The increased market potential for lab consumables has seen many global players setting up either a direct subsidiary or a joint venture with their erstwhile distributors. Cashing in on the new opportunities, this ever-growing segment has been able to maintain its pace, registering close to 25 percent growth in 2010



The lab consumables market occupies the largest slice of the biosupplier market. According to industry sources, the overall consumables market is close to 2,600 crore. Benefiting from its immunity to fluctuations, the segment has registered a growth of 25 percent in 2010. The segment is made up of various sub-segments such as plastic-ware, glassware, molecular biology reagents and instrument-related consumables such as plates, columns, tubes and reagents. Microplates, DNA kits, oligonucleotides and gels are also a part of laboratory consumables. The general consumables are estimated at close to 1,000 crore, while the reagents market is said to be close to 1,200 crore. The culture media business is estimated to have registered a revenue of 150 crore. There are many sub-segments within this and, interestingly, there are many players who are leading each segment.

The general consumables segment, estimated to be close to 1,000 crore, has players like Merck, Rankem (RFCL), Thermo Fisher and S D Fine Chemicals controlling 50 percent market share. The molecular biology market is estimated to be close to 275 crore. Sigma-Aldrich has a monopoly over this segment, while players such as Life Technologies are trying to make inroads into the market. After acquiring Bangalore Genei, Merck has been able to tap its market catering to schools and colleges, which is close to about 30 crore. The major trend that is said to have led to a hindered growth is the shift of focus from genomics to proteomics and antibodies. Companies such as Stratagene, Promega and New England Lab also have a good share through various distribution networks in the country.

The oligos market is steady and is estimated to be close to 15 crore. Life Technologies, Sigma and Qualigen purification kits also registered 15 percent growth.

The culture media, is said to be close to 150 crore. Has grown at the rate of 15 percent. The dominant players here are Difco and Hi Media. The prices in this sub-segment are melting because of huge competition. GIBCO also maintained supremacy in the FCS and FBS area. HiMedia continued to hold a strong position in the culture media space in India.

The chromatography consumables market is also huge and the requirements are mostly met by the companies selling instruments in the area. The market for this segment is estimated to be close to 230 crore. The consumables in this sub-segment include columns, vials and syringes. Companies such as Agilent and Waters have been supplying their

consumables for the chromatography instruments through a wide network of distributors throughout the country.

<p>Overall lab consumables market is about to 2,600 crore</p>	<p>The plastic-ware and glassware markets are said to be close to 145 crore, registering a growth of three-to-five percent in 2010. This sub-segment according to industry sources is growing at a very sluggish rate and there is a possibility of de-growth in the coming years. Borosil continues to hold a major share of the glassware segment followed by Corning with its range of glassware that addresses the quality needs of the high-end labs. Besides, the glassware supplied by chemical suppliers such as S D Fine Chemicals and the unbranded Chinese ones hold substantial chunk of the market</p>
<p>The general consumables are estimated at 1,000 crore</p>	
<p>The reagents market is close to 1,200 crore</p>	<p>In 2010, the segment witnessed the MNCs increasing their direct presence in the India market. The acquisition of Gurgaon-based LabIndia by Life Technologies and the takeover of New Delhi-based RFCL by US-based Avantor Performance Materials Holdings is expected to further boost the product and service offerings of these</p>
<p>The culture media business is around 150 crore</p>	
<p>Chromatography consumables market is estimated to be close to 230 crore</p>	<p>Even Qiagen, since early 2011, has entered directly into the Indian market and more companies are expected to be added to this list. Many smaller companies in this segment are planning to venture into research and development and manufacturing of lab reagents.</p>

The competition between the principal companies and erstwhile distributors is also an interesting phenomenon to watch. The setting up of DSS Takara Bio at Delhi to manufacture reagents is a case in point. And with many other distributors either planning or moving into manufacturing of reagents, the competition is only expected to hot up.