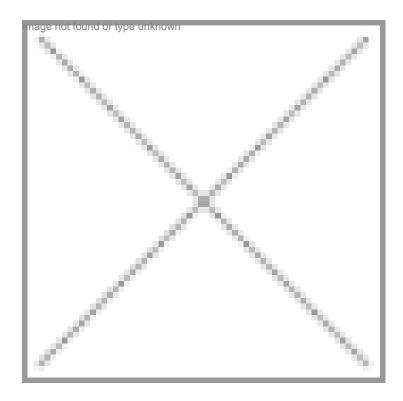


CONSUMABLES KEEP UP THE PACE

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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



he lab consumables market occupies the largest slice of the biosupplier market. According to industry sources, the overall consumables market is chose tot 12,600 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 through,000 crore, while the reagents market is said to be close to the consumable culture media business is estimated to have registered a revenue begat 50 to crore. There have 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 store 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 refer 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 about 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 to to the close to the

The culture media, is said to be close to image of 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 closed 230 corole. The donsumables in this subsegment 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.

Overall lab consumables market

The general consumables are

The plastic-ware and glas ware 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 is about to 2,600 crored or type unknown 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 estimated at intermed or type unkrhigh-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

The reagents market is close tclmage not found or type unknown 1,200 crore

The culture media business is around 1750 crofeind or type unknown

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

Chromatography consumables 230 crore

market is estimated to be close to image not found of type unknown 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.

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.