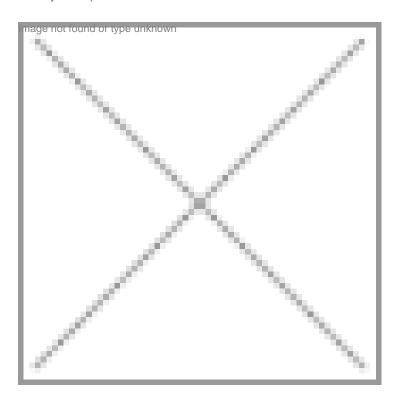


AT 30 PERCENT GROWTH, A MIXED BAG OF PERFORMANCES

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While growth in the overall centrifuge market slackened in 2010-11, the PCR market showed an impressive growth with biotech companies in India moving towards high-end drug discovery research



Centrifuges holds the major share of the life sciences instrumentation market, which also comprises sub-segments like flow cytometry, PCR, spectrophotometer and electrophoresis. While these sub-segments continued to predominate the lab instrumentation market in India, upcoming segments like gene and protein sequencing displayed impressive growth over the past one year and could play a significant role in the market.

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The total lab instrumentation market for 2010-11 stood at \$\frac{1}{2050}\$ \(\frac{1}{2050}\$ \(\frac{1}{20

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All the sub-segments witnessed an increasing demand for high-throughput instruments

Centrifuges market clocked total sales of interpretation of type unknown

PCR market (both the classical and real time PCRs) stood at

Demand for RT PCRs is gradually rising in the market

Flow cytometry market showed a 112.5 crore

Spectrophotometer growing at 8-10 percent

about 1000 cricks the order to the previous fiscals. This was primarily due to the slow growth of vaccine companies in India, which last year had majorly invested in H1N1 vaccine production but did not see much growth in sales thereafter. The total certifuges market blocked total sales of 112.5 crore (\$25 antillion) pring 2010 എം a against 100-120 crore in 2009-10. This segment further has its divisions, which includes ultra centrifuges, high speed centrifuges and tabletop centrifuges. This apart, it also comprises industrial centrifuges and blood centrifuges. drop and clocked total sales image trate white ar dentification market saw a image or drop with his utotal market clocking 15.75 crore (\$3.5 million) due to the impact of vaccine companies in India. The same is the case with the high inpreed contribuges market that clocked 15.75 crore (\$3.5 million). The market for tabletop centrifuges - by far the largest within this space - recorded total clocked sales of 80 crofe and tise sales of 36 crcf (\$8 million) invite fiscal as against 36.8 crore in 2009-10. During the year, an average of 1,000 units of tabletop centrifuges were installed. The industrial

13.5 crore (\$3 million).

In the ultra centrifuges segment, Beckman Coulter held a leading share of around 65 percent. In high speed centrifuges too, Beckman Coulter was leading with 55 percent share followed by Thermo Fisher Scientific. Eppendorf dominated the tabletop centrifuges segment with a market share of 60 percent. Alfa Laval was a major player in the industrial centrifuges market. In the coming years, the same players will continue to dominate this segment, while simultaneously more players will enter the tabletop centrifuges segment making the overall segment extremely competitive.

The PCR market (both classical and real time PCRs) was about a south as again to take the pcr market (both classical and real time PCRs) was about a south a s While the size of the classical PCR market stood at Im45 crore with real-time PCR market stood at around m35 crore with real-time PCR market stood at around m35 crore with real-time PCR market stood at around m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR market stood at a round m35 crore with real-time PCR m35 crore with rea fiscal. Around 1,500 units of classical PCRs and around 250-300 units of RT PCRs were sold during the year. Major clients for most of the PCR players were research institutions mainly into molecular diagnostics, forensic laboratories, pathology laboratories and institutes involved in genomic research.

Major companies in the classical PCR space include Eppendorf (30 percent share), ABI (15-16 percent share) and BioRad (30 percent). In RT PCRs, major companies include ABI (30 percent) and Roche (20 percent) followed by BioRad and Eppendorf. The classical PCRs registered a growth of 10-15 percent in the market, while real time PCRs showed a gradual impressive growth of 20-25 percent. While most of the clients still opt for classical PCRs, the demand for RT PCRs is gradually rising in the market.

Most of the demand for PCRs came from the crop sciences sector that has large scale lab set-ups where the number of PCRs installed can be anywhere between 8-10 per lab. Major pocket areas for PCR sales in India include Hyderabad, Bangalore and Aurangabad, the hubs for most big seed player companies in India. This trend will continue to grow with both multinational companies and Indian companies setting up testing labs for a vast array of food crops like rice, maize and vegetables. Also, there has been a paradigm shift with India moving into high-end discovery research rather than merely being a destination for drug development. This has proved to be a blessing for PCR companies in India whose sales grew with companies buying high throughput PCR instruments for high-end research. Of late, the overall PCR segment has witnessed the entry of Chinese players who supply PCR equipment in India.

The flow cytometery market also showed a drop and clocked total sales climated 2.5 for or with 2010-2011 as again in again again in again in again in again in again in again in again aga in 2009-2010. This is due to the fact that these high-end instruments, require large-scale investments and are still in their nascent stage of growth. However, over the past one year, companies have been gradually adopting the technology. Again, like PCRs, high throughput equipment also remain the demand of the day. The growth is expected to touch 15 percent in the coming years. Approximately 50-60 units of flow cytometers were sold during the year. Major sectors where there has been a rising demand for flow cytometers include research institutes, diagnostics and imaging companies. Becton Dickinson, by far, is the leading player in the flow cytometry market.

Another upcoming segment is the gene sequencing market where the new generation sequencing (NGS) space is witnessing a rapid growth of around 30-35 percent due to the growth of reagents market in India. Till date, around 20-30 NGS equipment have been installed, while last year around 10 such equipment were installed. In the coming year, industry observers predict that an average of 20 NGS equipment would be installed. However, this industry is facing cost issues.

The spectrophotometer market clocked sales cima80 cróre and is growing at an average rate of 8-10 percent. Around 300 units of such equipment are sold every year. Major players in the segment include Thermo Fisher, Shimadzu and Eppendorf.