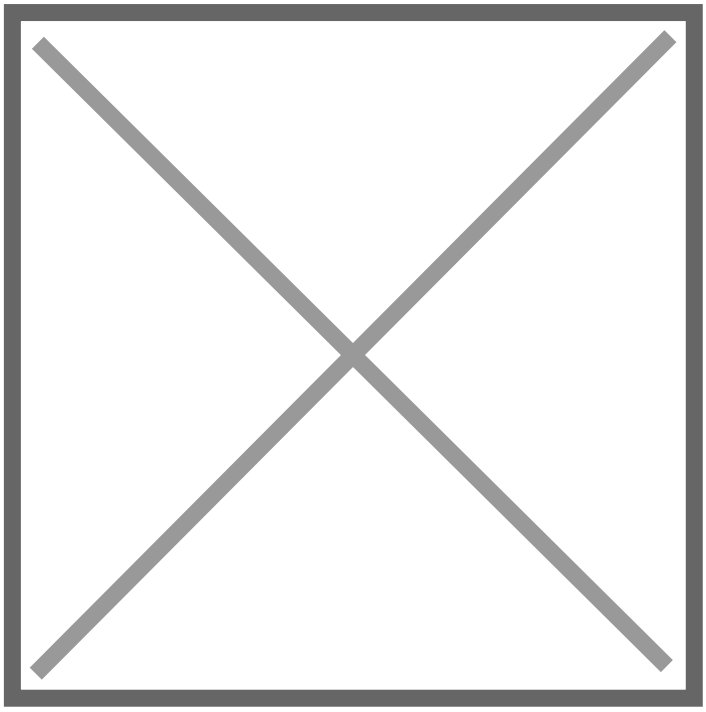
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## Competition hots up

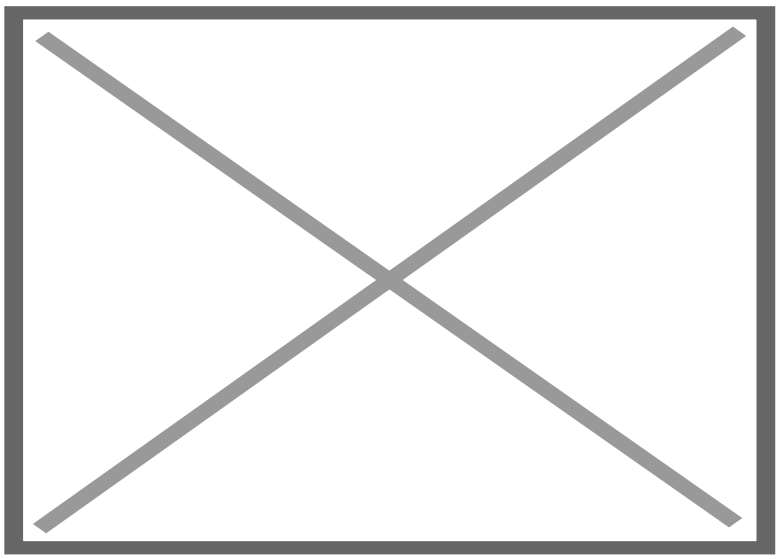
07 July 2010 | News



*There are more than 15 companies offering LC-related instrumentation and services in India. The top three companies—Shimadzu, Waters and Agilent Technologies—account for more than three-fourths of the total separation market.*

*Cost concerns and budgetary restraints that resonated throughout the life science industry in 2009 affected chromatography product sales. But the demand for chromatography products continue to be the highest in analytical instruments business in India with a projected growth rate of 20 percent in 2010.*

## Chromatography



Separation technologies, including Liquid Chromatography (LC), Gas Chromatography (GC), and other techniques besides Ion Chromatography (IC), represent one of the largest segments of the analytical instrument market. The segment accounts for roughly 27 percent of the total BioSupplier market size.

The unrelenting needs for more efficient and faster analysis have led to significant new developments in chromatography in recent years, notably ultra-high performance liquid chromatography (UPLC), monolithic columns and hydrophilic interaction chromatography (HILIC). Waters' UPLC has rapidly grown out of its infancy and moved into the analytical labs. Quickly following Waters other vendors have also brought out Fast LCs with similar objective but
compatible with standard HPLC equipment. Agilent offers RRLC - Rapid Resolution Liquid Chromatograph. Shimadzu introduced UFLC – Ultra Fast Liquid Chromatograph offering high throughput but without high pressure. Dionex achieves Fast LC with Acclaim Fast column with UltiMate 3000 Intelligent LC. Thermo Fisher launched Accela High Speed LC that has been designed to optimize performance of sub–two micron particle columns and up to 15000 psi.

**A competitive market**

Today, there are close to 15 companies offering LC-related instrumentation and services in India. The top three companies—Shimadzu, Waters and Agilent Technologies—account for more than three-fourths of the total separation market.

Fast LC is indeed the growth engine today, contributing to the enhanced growth of analytical HPLC. This technique is gaining wide popularity with a growth rate of 15 per cent.

According to BioSpectrum estimates, total market for LC and associated parts and accessories for the year 2009 was over Rs 260 crore. In the case of HPLC, sale of 3,000 systems are average in the recent years. However, because of the credit crunch last year, the market came down to around 2,500 units.

Waters and Shimadzu did better than other players and both continue to enjoy more than 30 percent market share each followed by Agilent. These three companies together hold close to 80 per cent of the market. Dionex and others share the remaining 10 percent. Waters continues to be the most popular in UPLC segment.
The liquid chromatography market is clearly led by a few major participants, opportunities for smaller companies to make an entry is very less. The increased market potential in this segment has, however, seen many global players setting up either a direct subsidiary or a joint venture with their erstwhile distributors. One of the companies – Flexit Laboratories, Pune (now acquired by Grace Discovery Sciences) is locally manufacturing HPLC columns. In view of the increased demand for chiral columns, Daicel Chemical Industries has recently set up a Technical Support Laboratory at Hyderabad.

The next big sub-segment Gas Chromatography or GC is estimated to have reported annual sales of about 1,200 units in 2009. The imported systems from Agilent, Perkin Elmer, Shimadzu, Thermo Fisher, and Varian are popular among both pharma and non-pharma customers and all these brands put together enjoy more than 75 percent of the market for GCs. There is an appreciable demand for GCs manufactured locally led by Thermo Fisher (earlier Chemito) and to a little extent by other manufactures like Nucon and CIC.

Overall, the demand for chromatography products continue to be the highest in analytical instruments business in India with a projected growth rate of 20 percent in 2010. The market outlook is very positive through 2010, as the market leaders have already confirmed receiving good value orders in the first quarter of 2010.

- Chromatography represents one of the largest segments of the analytical instrument market, accounting for roughly 27 per cent of the total BioSupplier market size.
- HPLC sales stood at 2,500 units in 2009.
- GC annual sales stood at about 1,200 units.
- Estimated total market for LC and associated parts and accessories for the year 2009 were about Rs 260 crore.
- Shimadzu, Waters and Agilent Technologies together hold 80 per cent of the market share. Dionex and others share the remaining 10 per cent.
- Waters continues to be the most popular ub UPLC segment.
- Industry anticipates HPLC sales of over 3,000 units in 2010.