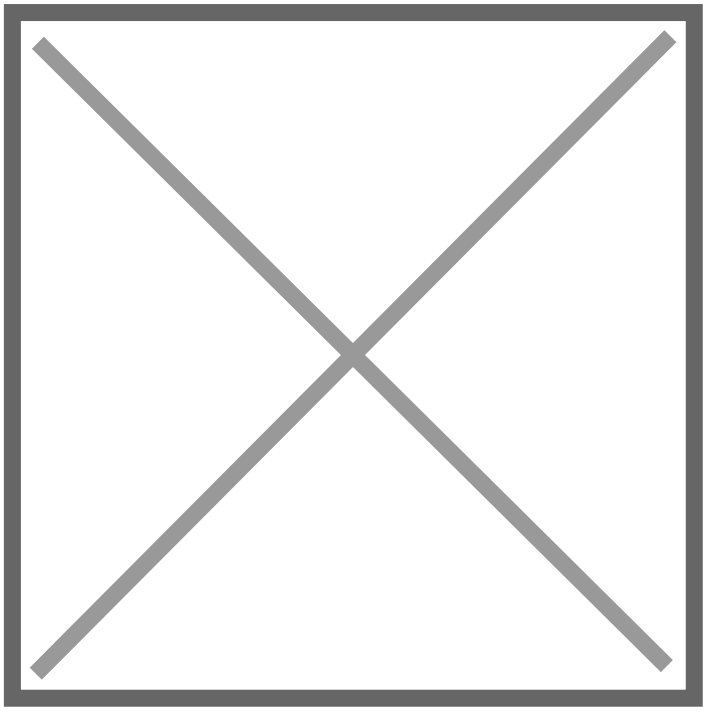
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Biotech growth boosting HPLC business

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BIOSUPPLIERS TRENDS

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Although the HPLC market in India is growing at 10-12 percent, the HPLC usage in biotech space is growing at a rate of 20-25 percent.

High Pressure Liquid Chromatography (HPLC) is a popular method of analysis because it is easy to learn and use and is not limited by the volatility or stability of the sample compound. Modern HPLCs have many applications including separation, identification, purification, and quantification of various compounds. There are many players who are into the HPLC business in the world. A few such players are Alltech Associates, Baxter Healthcare Corporation, Beckman Instruments, Inc. Applied Biosystems, Millipore, Thermo Electron, Hitachi, Shimadzu, Bio-Rad Laboratories, Dupont Company , Tosohaas, Gilson, HPLC Technology, Proteinlabs and Waters Chromatography.

In India companies like Thermo Electron Corporation, Waters and Agilent Technologies are into marketing of HPLCs for Indian companies with direct presence. Shimadzu has presence in India through Spinco Biotech, a Chennai-based company. Spinco has been the distributor for Shimadzu HPLC in the country for more than two decades. Over the years, Spinco has established an installation base of more than 4000 Shimadzu HPLC systems. In addition to these, we have Chemito Technologies, an Indian company that manufactures HPLCs in collaboration with a German company Knauer. It has also has marketing collaboration with Knauer for its products in India. VWR International Ltd, a worldwide distributor for Hitachi range of products including HPLCs, started its operations in India from June 15, 2005. It has appointed Tritech Systems as its distributor. Hitachi has installed about 350 HPLCs in the last four years in India.

Sanjeev Dhar, country manager, LSCA business, Agilent Technologies India pointed out that though the HPLC technology has been in existence for many decades, there is no good local manufacturing capability in the country. "Even HPLC technology as such is undergoing tremendous changes and many breakthrough technologies are expected in the time to come. It will be difficult for any local manufacturer to keep pace with the technology and make capital investments in the manufacturing infrastructure," he said.

Depending upon the configuration and customization, the HPLC systems are priced at $25000 Ã¢â?¬â?? $40,000 by multinationals. HPLCs manufactured locally are available at a price range of Rs 7- 8 lakh again depending on the configuration of the instruments. Considering the units sold, one can say that the HPLC market is in the range of about 250-300 crore in India.

"The HPLC market in India is estimated approximately at $35-45 million with 1400-1800 units. Most of the systems go to pharmaceutical sector (approx 60-70 percent) and rest is distributed to education/research/biotech/environmental (30 percent)," said Sanjeev Dhar. According to Nilesh Gandhi, manager Ã¢â?¬â?? analytical products, Chemito Technologies, over 50 percent of the HPLC units sold in India are consumed by pharmaceutical industry followed by chemical industry (about 30 percent) and biotechnology (about 15 percent) and rest by the others. "The Indian companies use about 1500 units of HPLCs each year each costing about Rs 7-8 lakh," he said.

However, Shashin Shah, national product manager, Scientific Instruments Division, India Arabian Peninsula and South Asia, Thermo Electron LLS India noted, "The pharmaceutical industry has major share of the HPLC market with 65-70 percent and biotechnology about 8-10 percent. Government organizations and research institutes account for about 10 percent. The rest is from the chemical industry and food and beverages. The use of HPLC in biotechnology has increased in the last couple of years mainly because of the growth of the industry."

Expressing similar views B K Kulkarni, general manager- sales, Waters India said, "We feel the HPLC market in India is growing at around 30 percent and the present market size for the year 2005 is estimated around $70 million ($55 million for LC and $15 million for Columns). The major LC users can be categorized in five segments namely pharmaceuticals (70 percent), biotechnology (12 percent), government/institutions like DBT, CSIR labs and universities (12 percent), food and beverages (2 percent) and chemical industries other than pharma (4 percent)."

Since January 2005 with the Intellectual Property Rights in place in India, leading pharmaceutical and biotechnology companies are earmarking more funds on research and development activities. BK Kulkarni of Waters India observed, "The use of HPLCs in biotech and biopharmaceuticals would grow in the coming years. We foresee a demand for sophisticated/advanced HPLC Systems, rather than routine analytical systems." Moloy Chakravorty, sales manager - South Asia, VWR International said, "Besides biotechnology, growth of clinical research organizations is also supporting the growth of the HPLC market. We can see a growth of 20-25 percent during the current year as CROs use these for their analytical and equivalence studies."

Sharing similar views, Dr G Ramakrishnan, director, Asia Business Development for Scientific Instruments Division, Thermo Electron LLS India said, "In the next 3Ã¢â?¬â??4 years, the growth rate for HPLCs will be even higher. The HPLC market is expected to grow more than 35 percent as HPLCs go a lot into the life sciences industry.

Narayan Kulkarni