

BIOPROCESS MARKET

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Competition-driven market scenario

The market continues to trod on the growth mode with single use fluid devices and disposables being a continuing trend among biotechnology companies in India

The bioprocess segment continues to witness an upward trend in its growth curve, thus hitting the mark of 20 percent for FY 2011-12 vis-a-vis last year's moderate growth rate of 12 percent. The segment clocked revenues of [₹604.8 crore](#) as against [₹504 crore](#) during the FY 2010-11. The same set of players continue to dominate the market with Pall Life Sciences, Merck Millipore (formerly known as Millipore) being the biggest players, followed by Sartorius. GE Healthcare has established its position for its specialized variety of filtration products. Around 60 percent of the business within this segment comes from the pharmaceutical sector followed by companies in the biotechnology sector. This is primarily because the scale of production in the pharmaceutical sector is much more than the biotechnology sector.

Market segments and trends

The market can be further subdivided into three levels namely, bulk filtration, coarse filtration and fine filtration. Within the segment of bulk filtration, Sartorius is a market leader with a share of around 35 percent. The fine filtration is by far the largest sub-segment within the bioprocess segment Pall Life Sciences, Sartorius and Merck Millipore being the leading names in the market. In the coarse filtration segment which is a [₹30 crore](#) market, indigenous companies such as Pharma Labs have been doing substantial business over

the recent years.

As observed in the recent past, application of single-use fluid devices and disposables has become an increasing trend among companies and is predicted to be a continuing norm in the coming years. Compared to multiple-use devices, such devices are easy to use, chances of cross contamination kept to the minimum and there has been an increasing demand among the regulatory authorities towards the use of disposables and single-use fluid devices. This is applicable to biopharmaceutical sector mainly the vaccine sector and companies into exports, where stringent safety norms need to be followed especially for their consignments. Within this segment, Sartorius has the largest portfolio of single-use bioprocess devices and disposables and has a strong footing within the segment.

Experts from the industry claim that unlike other segments, this market is scheduled to grow in the coming years due to the rise and prominence of a lot of indigenous players in the market. This could prove to be a major boost for a market which till date has been dominated by MNC players.

Highlights

Bioprocess segment is growing at a rate of 20 percent and clocked revenues of ~~₹604.8 crore for FY 2011-12~~ ^{₹604.8 crore for FY 2011-12}

MNC players continue to dominate the market with Pall Life Sciences and Merck Millipore being the largest players

Regulatory authorities prefer companies using disposables and single use fluid devices