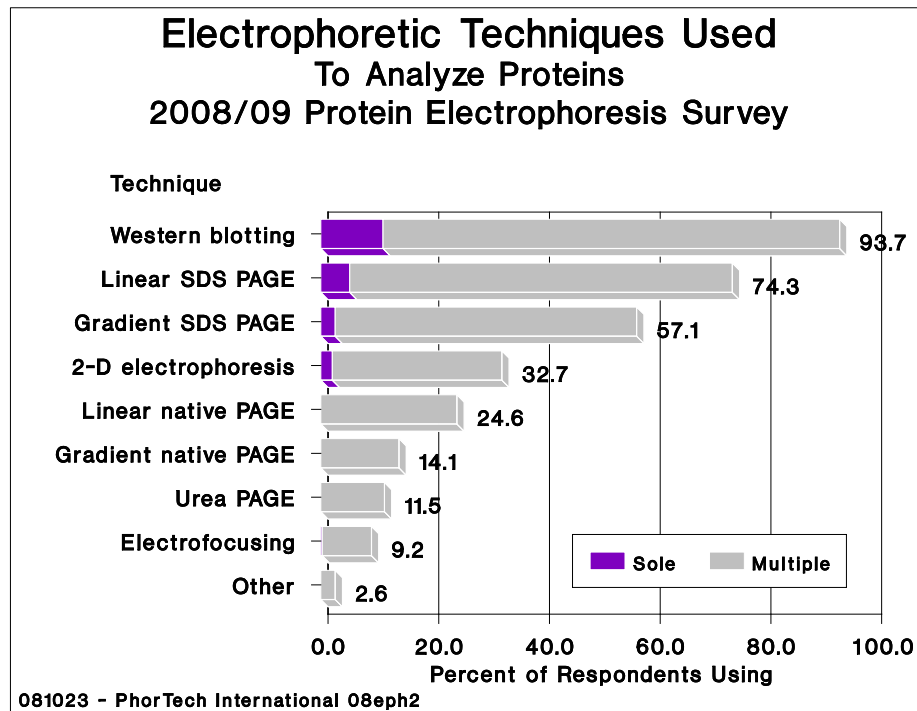


# Press Release

## Still Groovy After All These Years: Protein Electrophoresis Remains Active and Profitable

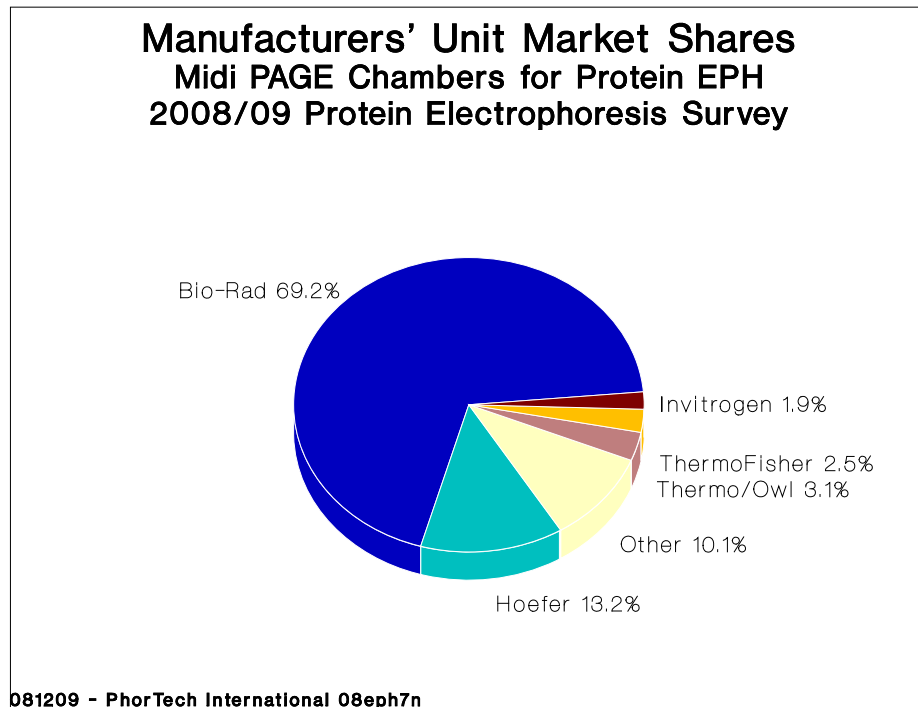
San Carlos, March 17, 2009: A whopping two thirds of North American life science researchers, or over 88,000, currently use protein electrophoresis and spend well over \$90 million over the past five years on instrumentation alone. Of this, the majority is spent on electrophoretic chambers, with power supplies taking only a modest slice of this pie. Researchers typically use a number of different electrophoretic techniques to separate and analyze their protein samples. In comparison with our report from several years ago, we see a continued increase in the use of Western blotting, electrofocusing, and 2-D techniques.



What has this meant for suppliers? Those with a consistent focus on this market have done well, while those with less commitment have suffered badly in the past five years.

These are a few of the conclusions of a new 230 page study, which forms part of PhorTech's MSPPSA series. The report examines the installed base over the past ten years for electrophoresis

chambers for protein applications (including standard vertical, mini vertical, electroblotting units, electrofocusing units, and preparative systems).



Respondents were asked to itemize electrophoretic equipment they had acquired in the past eight years, describing the brand and model of the instrument, the year of acquisition, and the category of instrument, according to a provided list. From this wealth of data (respondents itemized 2,367 protein electrophoresis chambers), we were able to show detailed graphs of growth over the past eight years. We then combined this dataset with the results of our previous study from 2004 and present an entire decade of data covering the US electrophoresis market. Using this longitudinal dataset, we establish market sizes and growth rates for each of these equipment categories.

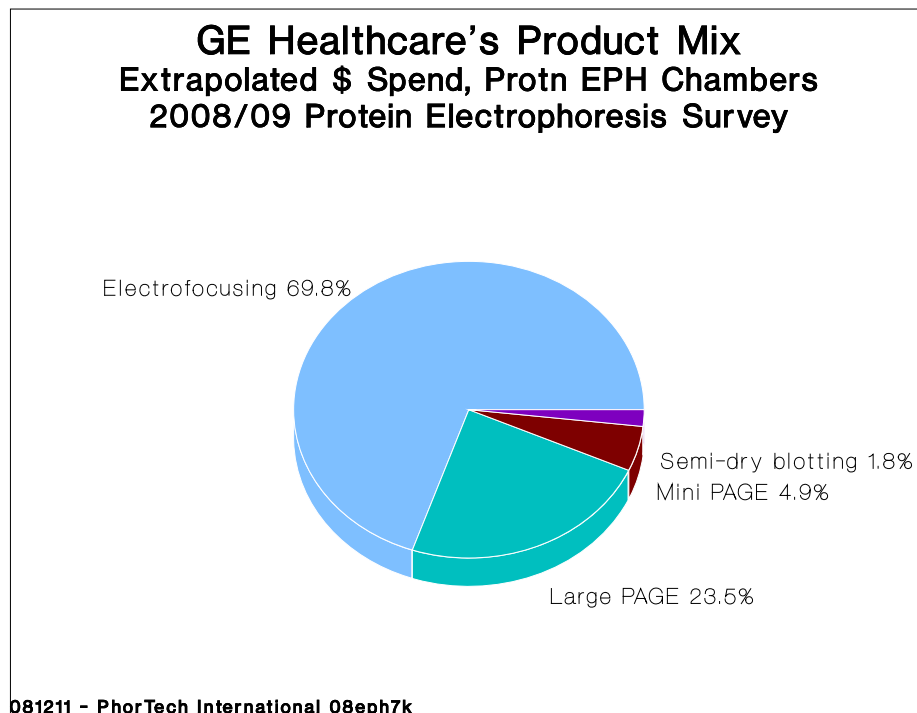
However, the report wouldn't be complete without a detailed audit of power supplies, which have rivaled the other segments in size. A screen shot of the questionnaire is shown below. Respondents itemized 652 power supplies purchased for use with protein electrophoresis over the past 8 years.

Please list the brands and models together with the year acquired for power supplies you have purchased over the past eight years for protein electrophoresis work, beginning with the most recent acquisition. Please list all the modes of operation (constant current, voltage, and/or power) each can deliver.

**Power Supplies for Protein Electrophoresis** *(Please list most recent first)*

Brand	Model	Yr Acquired	Operation Modes (Constant)
Select: <input type="text"/>	<input type="text"/>	Select: <input type="text"/>	<input type="checkbox"/> Current <input type="checkbox"/> Voltage <input type="checkbox"/> Power
Select: <input type="text"/>	<input type="text"/>	Select: <input type="text"/>	<input type="checkbox"/> Current <input type="checkbox"/> Voltage <input type="checkbox"/> Power
Select: <input type="text"/>	<input type="text"/>	Select: <input type="text"/>	<input type="checkbox"/> Current <input type="checkbox"/> Voltage <input type="checkbox"/> Power

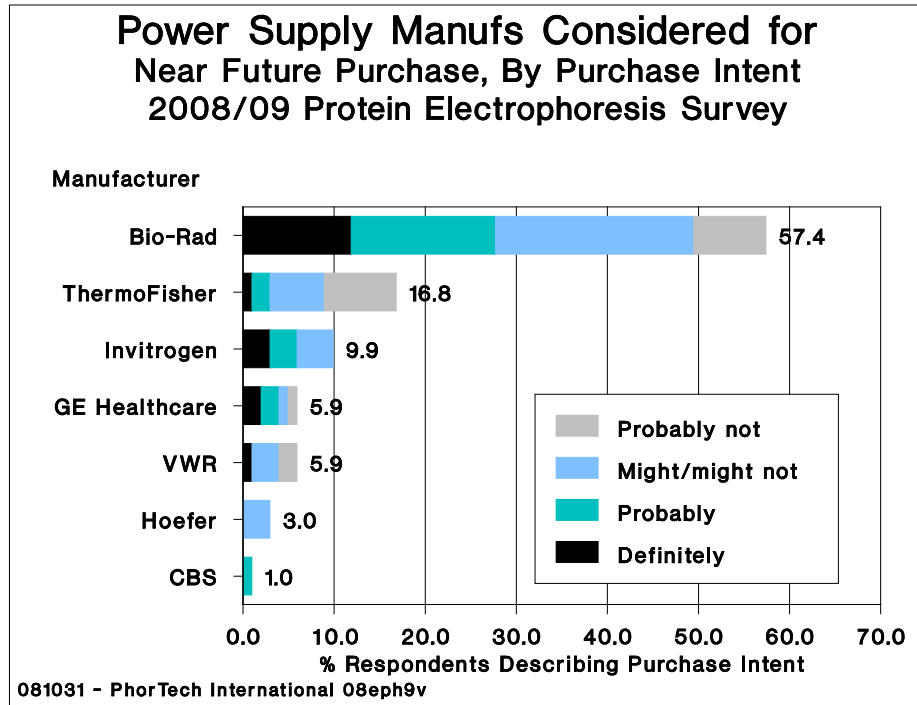
Unit and dollar placements per year, market sizes and growth rates, plus unit and dollar market shares for each product category are calculated, based upon an analysis of the 416 responses to invitations e-mailed out to a cross-section of U.S. life science researchers in October 2008. From this database of randomly selected products purchased, we can project size, growth, and trend data, as well as estimate leading suppliers' product mixes for these products. In the next graph, we see the focus GE Healthcare maintains on the electrofocusing segment, larger than for any other supplier.



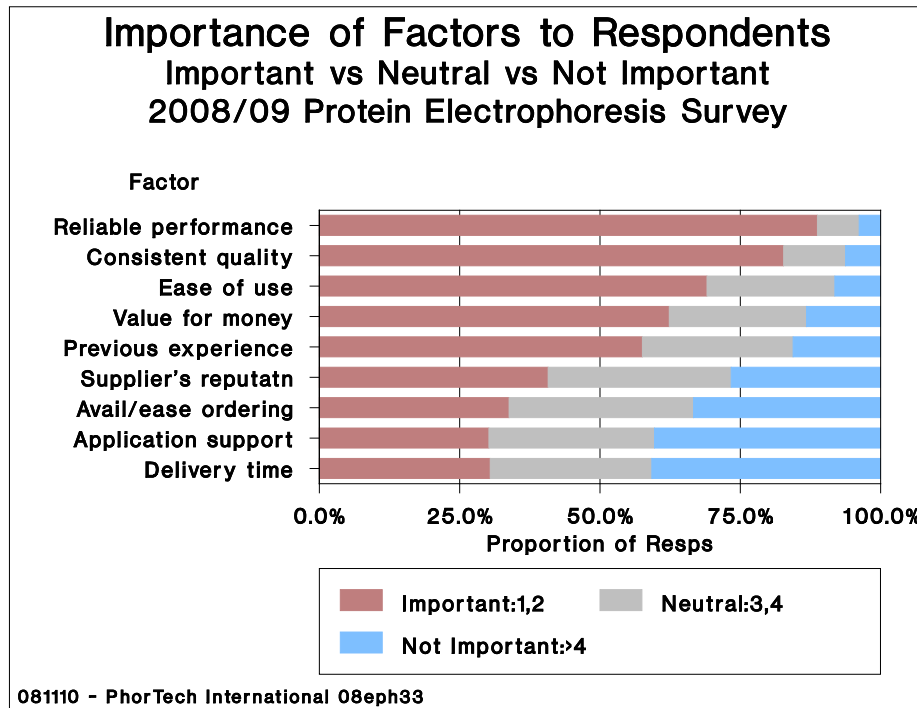
Complete demographic analyses for respondents to this survey include the distribution of users by type of organization, job title, scientific discipline, years of experience with protein electrophoresis, electrophoretic techniques in use, and involvement in the purchasing process

**Mean Price per Semi-Dry Blotting Chambers for Major Manufacturers**

Manufacturer	Mean Price/Unit
Bio-Rad	\$2,155
Other: Millipore	\$1,857
Thermo/Owl	\$1,501
Hoefer	\$1,380
Invitrogen	\$928
GE Healthcare	\$900



In addition, we calculate both unit and dollar market shares for suppliers, and look at the mix of electrophoretic products sold by the 25 leading suppliers to this market. Extrapolating to the market as a whole, we show tables of annual US sales for 1995 through 2004 and we find the total US market now well in excess of \$100 million. An entire section of the report is dedicated to future purchase plans and we use this data to project future growth rates and lines of products forecast to grow least and most rapidly. Over-confident suppliers will ignore these statistics at their own peril, while market-savvy suppliers will use this data to increase their market share and avoid market dead zones.



Customer satisfaction ratings are measured for leading vendors of instrumentation. That so much can change in so little time underscores the importance of consistent and periodic assessments such as this report series provides.

Finally, the report itemizes literally hundreds of specific verbatim comments regarding suppliers' performance, why certain brands or models of products would not be purchased again as well as the reasons why ready-made gels are not currently used. Reading these comments is equivalent to spending weeks of time in the field with end-users and provides essential insight for suppliers.

This report is undoubtedly the most comprehensive analysis of the current market for protein electrophoresis equipment in the U.S. and Canada and has already been purchased by astute competitors determined to strengthen their position in this lucrative market. Enhanced by over 180 color graphs and tables, this study provides a penetrating analysis and should be considered essential reading for anyone seriously intending to succeed in this competitive area.

#### **Companies/Brands Mentioned in This Report**

Agilent Technologies	Alladin Enterprise	American Bioanalytical
Ambion	Aquebogue Machine Shop	Bio-Rad Laboratories
BioShop Canada	Boekel	BRL
Cambrex	CBS Scientific	Cell Signaling Technology
Consort	Denville	E-C Apparatus
ELMECO	ESI	Fisher Scientific
Fotodyne	GE Healthcare	Heath/Zenith
Hoefer	Hybaid	Invitrogen
Isco	Jule, Inc.	Labnet
LABREPCO	LI-COR	Life Technologies
LKB	Lonza	Marysol Industry
MIDSCI	Millipore	Owl
Perkin Elmer Life Sciences	Pharmacia	Qiagen
Roche	R Shadel, Inc.	Santa Cruz Biotechnology
Serva	Shelton Scientific/IBI	Sigma-Aldrich
Stratagene	Thermo Fisher Scientific	VWR Scientific

A companion volume has also just been published that provides details for the precast gels, stains, and standards used in protein electrophoresis.

To obtain more information, contact Michael Eby at PhorTech International, +1 (650) 594-0785, or point your Web browser to [www.phortech.com](http://www.phortech.com).

-end-