

Press Release

Real-Time PCR Study Reveals Healthy Sales and New Developments

San Carlos, February 2, 2010: A brand new study of the real-time PCR instrument and reagent market indicates that the population of users, now estimated to total 68,900 North American bioresearchers is expected to expand by 16% in the near future. Current users are calculated to have spent a total of \$740 million over the last year for instrumentation and a lucrative stream of individual reagents, kits and master mixes. This report details the historic growth of this market, current market shares and reveals future trends.

For the installed base of real-time/quantitative PCR platforms, data was obtained from responses to the following survey audit form in which we asked a cross section of over 370 randomly selected bio-researchers to itemize the real-time platforms that they have access to. Respondents specified the brands and models, the format used most frequently, instrument quantities, dates placed into service, prices paid, and the number of users for each system.

Real-Time/Quantitative PCR Instrumentation & Reagent Study

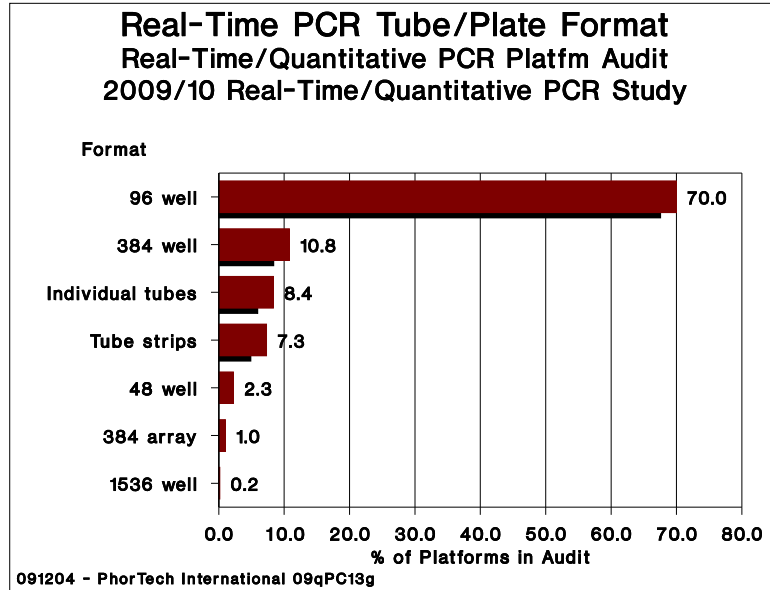
Now, we would like to ask a few questions about real-time PCR instrumentation.

Please list the brand(s) and model(s) together with the plate/tube format used most frequently, number of instruments, year acquired, approximate cost per instrument (in \$), and number of users for all platforms used for real time/quantitative PCR that you own or have access to, starting with the most recent. *(Please take your time and fill out the table as completely and accurately as possible).*

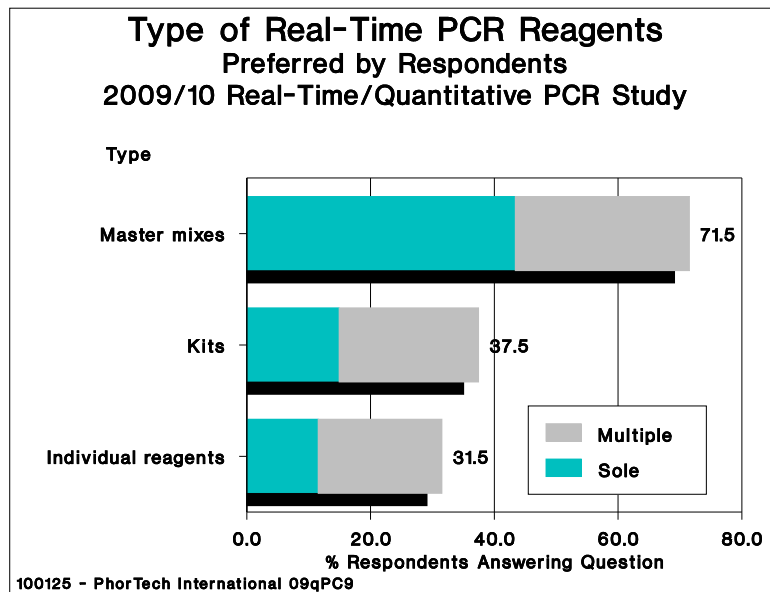
Please list most recent first

Brand	Model	Plate/Tube Format	# of Insts	Year Acquired	Approx. Cost	# Users
		Select:		Select:		
		Select:		Select:		
		Select:		Select:		

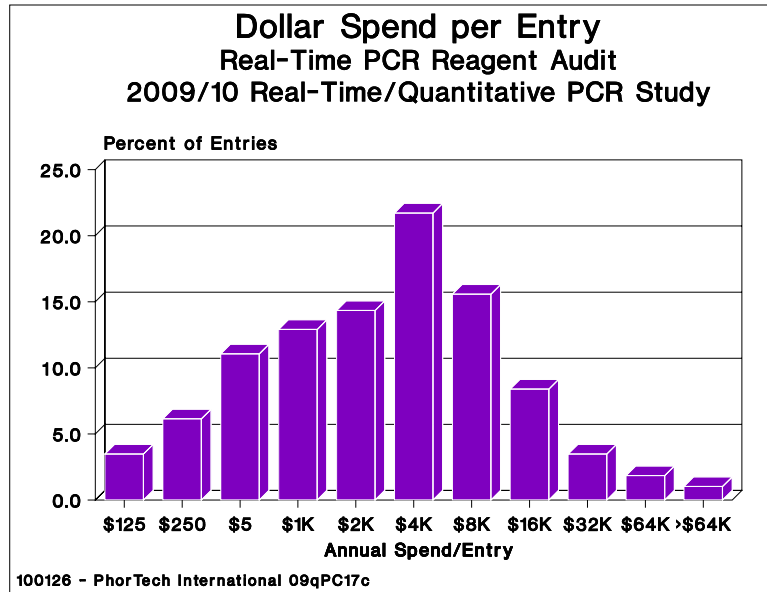
We collected details on a total of 579 real time platforms from 15 manufacturers placed in service over the past 10 years. From the year of acquisition, instrument sales continue to expand although the rate appears to have slowed over the past few years. Looking at another feature, the plate/tube format typically used, the 96-well format, continues to be the predominant type. However, researchers describe platforms using each of the seven different formats in the audit.



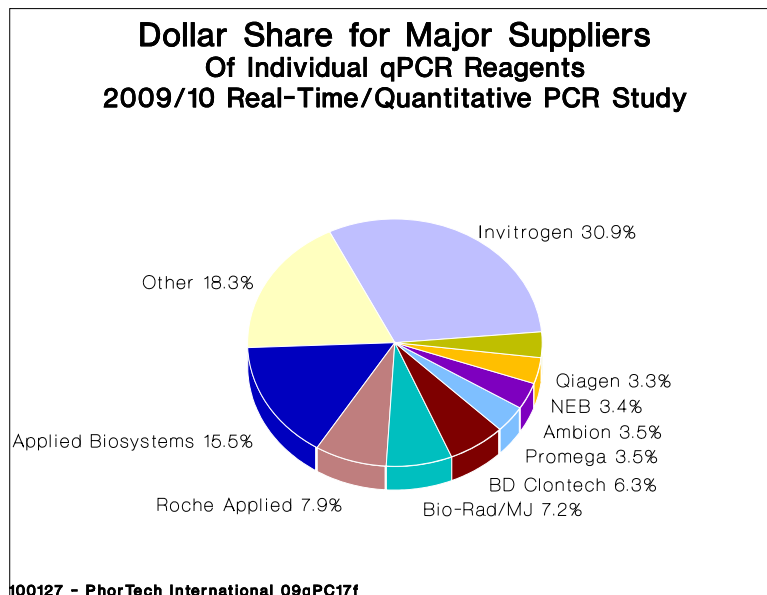
In addition to a detailed investigation into real time PCR platforms, reagents utilized are examined in detail. The next graph depicts the proportion of respondents preferring master mixes, kits or individual real-time PCR reagents.



The subsequent audit containing 807 entries details the supplier, type of reagent (master mix, kit or individual reagent) and associated spend by 362 current users. This reveals general trends such as the typical annual spend per supplier and type, shown next.



Examination of dollar market shares identifies major and minor suppliers for all reagents out of the 29 companies listed, as well as for each type of reagent. The next graph depicts respondents' expenditure for individual reagents which accounts for the smallest dollar spend compared to master mixes and kits.

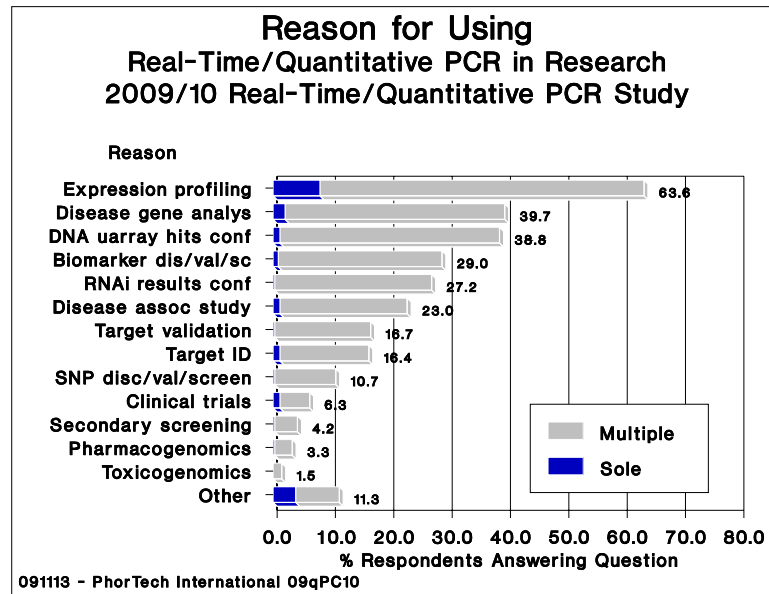


These are just a few of the conclusions of a new 212-page study, part of PhorTech's MSPPSA series. This series has been developed over the past 17 years to systematically measure market size, market share, growth rates, and supplier performance in key areas of bioresearch. This new dedicated report is the first of this series focused entirely on the real-time/quantitative PCR market, covering current market shares and future growth of both instrumentation and reagents.

An entire section of the report is dedicated to future purchase plans. We use this data to project future growth rates for instrument purchases. In addition to forecasting growth for each type of reagent

(master mixes, kits and individual reagents), weighted average growth rates are calculated for each supplier, identifying suppliers and types which are expected 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.

This report also covers attributes of current real-time/quantitative PCR usage. The reason for using this technique, shown below, is just one attribute measured in this study. Others include respondents' area of research, and applications currently utilizing real-time PCR.



Respondents' throughput of runs per week and reactions per run allows us to derive statistical values for the number of weekly real-time/quantitative PCR runs per week per respondent, and also per researcher, the reactions per run and the typical reaction volume. An audit quantifying throughput for each of 12 sources of samples and 10 different origins reveals the most common types of samples in addition to statistical values for each source or origin. The following table details the number of runs per week for each source.

Statistical Number of Real-Time PCR Runs/Week, by Source of Sample

Source	# Entries	Range	Total # Runs	Mean	Median
Drosophila	6	1-20	46	7.7	6
Simian	3	1-10	16	5.3	5
Other	36	1-30	199	5.5	4.5
Rat	32	1-50	192	6.0	3
E coli	12	1-50	96	8.0	2.5
Plant	14	1-24	87	6.2	2.5
Human	212	0.125-200	1,575	7.4	2
Mouse	185	0.125-200	993	5.4	2
Other animal	9	1-10	30	3.4	2
Other mammalian	25	1-10	82	3.3	2
Yeast	11	0.5-10	30	2.7	2
Other bacteria	38	0.25-50	134	3.5	1.7
Total	583	0.125-200	3,481	6.0	2.0

Some of the technical aspects of real-time/quantitative PCR methodology examined in this study include chemistries, biological and technical replicates, multiplexing and types of analysis. Anticipated future usage of these characteristics identifies those likely to expand and provides a measure of the rate of expansion.

Several different aspects of customer satisfaction are measured in this study. The overall satisfaction with current real-time PCR and respondents' willingness to adopt new approaches measured on 10-point scales reveals general attitudes towards current real-time/quantitative PCR. In addition, we asked respondents whether they would purchase the same make and model of real-time platform again today. From this input, we can calculate satisfaction rates for each major brand of instrument and discern problem areas by manufacturer. The open-ended responses to a separate more general query highlights suggested areas of improvement to real-time/quantitative PCR. Reading these comments is equivalent to spending weeks of time in the field with end-users and provides essential insight for companies in this field.

In addition, respondents were asked to rate eight manufacturers of real-time/quantitative PCR platforms for up to four factors they consider important when selecting a new instrument. This analysis shows the relative importance of the following nine factors in manufacturer selection: value for money, multiplexing capability, colleague's recommendation, previous experience, ease of use, best technical/application support, reliable performance, consistent quality and reputation of supplier. It also identifies the highest ranked manufacturer for each.

These ratings are invaluable both for manufacturers to measure their own performance as well as to discover areas of weakness for their major competitors that can be used to obtain competitive advantage.

This report is undoubtedly the most comprehensive analysis of the current market for real-time/quantitative PCR instrumentation and reagents in North America. Enhanced by over 160 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. The list of 44 companies mentioned in the report is listed below.

Companies Mentioned in This Report

AbGene (Thermo)	Ambion (Applied Biosystems)	Amersham Biosciences
Applied Biosystems	BD Clontech	Bio-Rad/MJR
Biogene	Bioline	BioPioneer
BioTrove (Life Technologies)	Cepheid	Chemicon
Corbett Life Science	Denville	Epicentre
Eppendorf	Eurogentec	Exiquon
Fermentas	Finnzymes (Thermo)	Fisher Scientific (Thermo)
Fluidigm	Gene Choice	HandyLab
Idaho Technology	Invitrogen	Kapa Biosystems
Lucigen Corporation	MWG-Biotech	New England Biolabs
Novagen (EMB Biosciences)	PerkinElmer	Promega
Qbiogene	Qiagen	Quanta Biosciences
Roche Applied Science	SABiosciences	Sigma-Aldrich
Stratagene (Agilent)	Stressgen Bioreagents (Enzo Biochem)	TaKaRa
Toyobo	US Biochemicals	

To obtain more information or to ask about our forthcoming companion report on DNA amplification instruments, reagents, and methodology, contact Michael Eby at PhorTech International, +1 (650) 594-0785, or point your Web browser to www.phortech.com. A detailed summary of the report including table of contents and list of tables and graphs, as well as the methodology and project objectives, the survey demographics, and a copy of the survey questionnaire can be downloaded from the site at no charge.

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