BioSpectrum the business of Bio & Health Sciences

New trends to drive analytical market ahead

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The government of India on December 17th lowered the economic growth estimate for 2012-13 to 5.7-5.9 percent as against the 7.6 percent projected by Economic survey in March. This sluggish growth in 2012 has impacted our industry adversely affecting the business. However, this downward pattern is not unique to India as many advanced economies and emerging ones have reported similar downhill trends.

The Indian analytical, laboratory and life science instrumentation market, valued around $1billion is struggling to achieve its projected growth of 10-15 percent this year. This decline in business has escalated the cost of sales while shrinking margins in a market where customers' expectations of support is significantly higher. Our focus is on two important market segments - chromatography-mass spectrometry and life science and we hope that the continued expansion and growth in pharma and biotech industries and thrust by government in academia and research laboratories will help us to achieve a minimum of 10 percent growth in 2013.

- Mr S Thyagarajan, chairman of Spinco Biotech group of companies

Analytical instruments industry has faced very challenging market conditions in 2012 due to combination of many factors including but not limited to global and Indian economic conditions, high inflation and depreciation of currency in India. But the future looks brighter, particularly for the pharmaceutical and life sciences market.

Pharmaceutical industry has registered close to 15 percent growth so far in this financial year. To sustain growth, capital investment is mandatory and we expect companies to make large capital purchases in Q4 FY 2012-13 and the following year. Due to regulatory, legal and administrative hurdles, the clinical research market has slowed down significantly in the past two years. Progress has been made by issuing robust regulatory

guidelines with compensation mechanisms and we expect the sector to emerge once again in the forefront of global scene as the advantages of doing clinical trials in India continues to attract global players.

Waters is ready and poised to take total benefit of the re-energized Indian market with new products and services in 2013. With our focus on providing total solutions to our customers, we will be launching new HPLC and UPLC products in 2013 along with strengthening our portfolio of award winning Ultra Performance Convergence Chromatography products. Above all our highly qualified, experienced and dedicated team across various cities in India is ready to provide world class service and support to all our customers to ensure their continued success.

- Mr KV Venugopalan, president, Waters India

BioPharma market is growing and everyday injectable drugs and vaccines are administered to improve health of millions of patients around the world. West works with its health care partners to design and manufacture drug packing and delivery systems to bring those drugs and vaccines from concept to the patient more efficiently, reliably and safely. As global healthcare need changes, West has evolved to meet and exceed those needs by understanding the challenges our customer face and nuances of a global market. Majority of the biopharmaceutical drugs are injectables and West is there trusted partner for packaging and delivery globally.

- Mr Alagu Subramaniam AR, country manager, West Pharmaceutical Packaging India

The overall biotech industry growth would be 8-10 percent mirroring the reduced economic growth projections (5.5 to 6 percent). The biggest influencer of this would be the government research institutions where the funding has become very sluggish and erratic for most part. Lifescience technologies and services providers like us would need to provide a solutions approach rather than just products to strengthen our position in the market. Ground level support to our customers especially in using cutting-edge products and technologies would be key. BioPharma would remain a key growth sector spurred by cost conscious healthcare systems across the world.

CROs on the other hand may have a mixed impact based on the projects which are coming their way from big pharma customers. I have heard of slowing down in projects. Agribio and food would be promising sectors especially as legislation and enforcement architecture gets strengthened. Export oriented industries as well as prominent brands would take the lead in the food sector. Agriculture including animal products would also look to new technologies to enhance the quality and yield of their products. Healthcare - translational health and diagnostics would continue to grow but would look at cost effective validated options, which will help in penetrating to smaller markets.

- Mr Devashish Ohri, managing director - South Asia, Life Technologies

Outlook for Genomics sector is bright in 2013 - in the academic sector, Genomics is increasingly being applied and in the industry sector pharma diagnostics and AgBio are the key growth sectors. Hi Seq and Ion Proton are going to be the main Next Generation Sequencing (NGS) platforms and Agilent Microarray platform will complementing it for copy number studies as well as confirmation of the NGS data.

- Dr Raja Mugasimangalam, CEO, Genotypic Technology

Genome Sequencing, performed using a popular method called Next Generation Sequencing is currently limited in understanding complex diseases and rare diseases. But very soon with the promise of $1000 genome it is believed that sequencing will be used in clinical setups frequently for delivering individualized therapeutics. The United Kingdom recently pledged £100 million for 100,000 patients with cancers or rare diseases and Norway has recently pledged to incorporate genome sequencing into its national healthcare system.

With all the limitations Sanger Sequencing gave way to the most efficient NGS that is revolutionizing the field of genomics. It is believed that this NGS technology can be put to use to understand and come up with smart solutions for some of the major challenges such as food security, health security, energy security and environmental security that the world is facing today. It takes about 10 to15 years for a drug from inception to market; it takes decades to improve a crop. The critical challenge in 2013 will be to start thinking-how to shrink this timeline? Questions will be asked-shall we invest few billions and 12 years for a blockbuster drug or invest few millions and few years for personalized medicine? In agriculture, we will be asked questions like can we simulate part of the breeding cycle in a computer and see results in months? Can we search terabytes of data and identify biomasses that can be used for commercially viable diesel? NGS data has already changed the biology experiments of 21st century - it has converted biology from a confirmatory science to exploratory science.

- Mr Prahalad Achutharao, CEO, Geschickten Biosciences