

HPLC (High Performance Liquid Chromatography) Market: Key Research Findings 2010

- Expectations are being focused on "Ultra UHPLC", "Antibody Drugs" and "Asia"-

■ Research Outline

Yano Research Institute has conducted a study on the HPLC (High Performance Liquid Chromatography) Market as described below.

1. Research period: March to May 2010
2. Research targets: Domestic HPLC and related products manufacturers
3. Research methodologies:
Face-to-face interviews with relevant personnel, supplemented by interviews via telephone and e-mail, and literature researches.

<What is HPLC (High Performance Liquid Chromatography)?>

In this research, HPLC market is defined to be comprised of "Systems/devices" and "Fillers/columns". HPLC is a chromatographic technique that can separate a mixture of compounds, and is used in biochemistry and analytical chemistry to identify, quantify and purify the individual components of the mixture. HPLC is made up of "System/device" consisting of sample injection, pump and detector modules and "Column", a cylinder in which the sample compound is separated while pushed through. There are many types of column with different lengths and diameters and the fillers packed in the cylinder for supporting various analytic needs and requirements.

■ Key Findings

● HPLC market in fiscal 2009 was 53.09 billion yen

The size of HPLC (high performance liquid chromatography) market in fiscal 2009 was 53.09 billion yen. Although the environment surrounding the market is tough with the impacts of global economic recession, signs of recovery are beginning to be observed as well.

● Expectations focused on "Ultra HPLC" and "Antibody Drugs"

Expectations are being focused on the fields of "Ultra HPLC" and "Antibody Drugs". "Ultra HPLC" is a next generation HPLC which permits higher level analysis with enhanced analytic capabilities and reduced analyzing time. As valued by the users including pharmaceutical companies, the manufacturers are working on the popularization of the systems and improvement of columns. In the "Antibody drugs" field, as R&D is expected to increase as drugs with few side effects, related systems and columns will keep growing in the future.

● With further acceleration of overseas sales channel development, "Asian" markets to expand rapidly

In order to increase product sales, every manufacturer is reinforcing their activities on the development of overseas sales channels. The demand of the products is expected to increase continuously, especially in Asian countries centered on China and India, and the players to accelerate their activities on reinforcing sales organizations in the area

■ Report format:

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■ Research Summary

1. Market overview

HPLC (High Performance Liquid Chromatography) is currently used extensively in Japan as a typical technique for separation and quantitative estimation of various organic compounds. Technological innovation has been advanced and the use of HPLC is expanding in various fields and applications such as a tool for GLP/GMP (Good Laboratory Practice/Good Manufacturing Practice) in pharmaceutical industry, proteomic analysis, biomarker search, and water examination for environment analysis. In order to respond to the needs for diversification of analysis objectives or efficiency improvement, HPLC makers are working on the innovation of system/device technologies and development of column fillers/packed columns.

In the current HPLC market, it is rather difficult to expect rapid and substantial growth of the market as the penetration ratio is already high among the users who may require HPLC, and the technology innovation achieved to a good level. The domestic HPLC market in fiscal 2009 is estimated to be 53.09 billion yen (comprised of systems/devices for 67.5 percent and fillers/columns for 32.5 percent). The CAGR (compound annual growth rate) of the market from fiscal 2006 to 2009 was limited to 1.4 percent, under prolonged tough market environment impacted by the production adjustment and capital investment suppression due to the global economic recession. Recently, however, there are favorable phenomena as well, such as a sign of demand recovery in the chemical industry, and people are paying attentions to the future market development.

2. Noteworthy trends

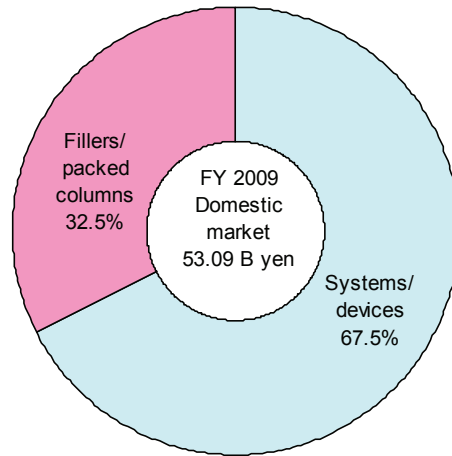
“Ultra HPLC” which enables higher level analysis with improved analytic ability and reduced analyzing time is beginning to be established in the market, and the players are working on the sales promotion and improvement of supporting columns. The reduction of analyzing time is valued by the users, including pharmaceutical companies, which permits to improve product development efficiency. Future expansion of product lineups is being expected.

Also, the demand for antibody drug related analysis is increasing. The research and development of antibody drugs as a drug with few side effects is expected to increase. Bio-systems and columns for protein refining will continue growing from now on.

3. Future forecast

While the activities as mentioned above are observed in the Japanese domestic market, players are reinforcing their activities on the development of sales channels in the overseas market. Especially, Asian regions centered on China and India is observing remarkable growth, with rapid growth of demand for environment analysis in China and drug development related analysis in India. As the demand is expected to grow continuously in Asian regions, players will accelerate their activities on the development and enhancement of sales organizations in the overseas market.

Fig. 1: HPLC Market Distribution (FY 2009)



Estimated by Yano Research Institute

Note 1: Based on the shipment I in value from the makers

Table 1: HPLC Market Size Transition

(Unit: Billion yen, %)

	Systems/devices + Fillers/columns		Average annual growth rate (CAGR)
	FY 2006	FY 2009	
Domestic market size	50.99	53.09	1.4

Estimated by Yano Research Institute

Note 2: Based on the shipment I in value from the makers