



2004/05 MSPPSA SERIES

ELECTROPHORETIC
EQUIPMENT & MEDIA
MARKET STUDY

AN ANALYSIS OF
MARKET SIZE & GROWTH,
MARKET SHARE,
PURCHASE PLAN &
SUPPLIER ASSESSMENT FOR THE
U.S. LIFE SCIENCE RESEARCH MARKET

A Multi-Client Report

by
PhorTech International
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I. BACKGROUND



A. SURVEY OBJECTIVES

The purpose of this survey was to provide the management of our client companies with an analysis of the current U.S. market for electrophoretic equipment (including protein and nucleic acid electrophoretic gel chambers and power supplies) and gel media (including ready-made gels as well as media for hand-cast gels). This represents the attitudes of a cross section of researchers who utilize gel electrophoresis of in their work.

The surveying was blind, with no reference made to any clients for the survey. To encourage respondents to express themselves freely and without bias, the survey was anonymous, and made frequent use of open-ended questions.

Several demographic screens were used to characterize respondents. These include the length of experience with electrophoresis, professional position, level of involvement (either personally or as a member of a group) in the purchasing of electrophoresis products for their organization, type of organization and, if located in industry, the type of industry (agricultural, biotechnology, cosmetic, diagnostic testing, petrochemical, pharmaceutical, or other). Those working in a core facility or centralized lab that analyzes samples for others were also identified.

At the beginning of the survey, respondents were asked whether or not they currently analyze protein or nucleic acid samples using electrophoresis. Those answering negatively were asked to back out of the survey, as they were not qualified to continue. Those answering positively were directed to specify the electrophoretic techniques they currently performed from a comprehensive list of 12 options. This consists of SDS-PAGE, native PAGE, urea PAGE, electrofocusing, 2-D electrophoresis, electroblotting, submarine, manual DNA sequencing, mutational analysis, preparative electrophoresis, pulsed field techniques and an 'other' option for techniques not represented on this list.

Respondents were then directed to a series of detailed audit questions. They were first queried about the electrophoretic chambers they have purchased in the last 5 years. Specifically, researchers were asked to itemize the brand, model, number of instruments, the year acquired and the type of gel chamber (either mini PAGE, PAGE, IEF, blot or prep) used for protein electrophoresis. This was immediately followed by a detailed audit in which researchers were asked to provide comparable information regarding nucleic acid electrophoresis chambers they had purchased in the last five years. These instruments were classified into any one of the following five categories: submarine, sequencing, pulsed field, SSCP or DGGE.





Next, respondents were queried about the power supplies they had purchased in the last 5 years. In particular, respondents were asked to specify the brand and model along with the quantity purchased, year of acquisition, maximum voltage and use (for either nucleic acid or protein separation or both) for all recently purchased power supplies.

Respondents were also asked to indicate whether they plan to purchase any new electrophoresis instrumentation in the coming 12 months. For those answering positively, the brand(s) and model(s) under consideration were also requested. In response to the next query, researchers indicated whether there were any brands of electrophoresis instrumentation which they wouldn't buy, and if so, to specify the offending brand and the reason for dissatisfaction.

The final question in the section on electrophoretic instrumentation asks respondents to identify the top ranked manufacturer (from a list of six major instrument manufacturers plus an 'other' category) according to five different criteria. These are easiest to use, most reliable quality, best value for money, highest versatility and best service and support.

The next series of four questions relates to respondent's usage of ready-made gels. Researchers were first queried as to whether they use ready-made gels for some or all of their work. Those using these for part of their needs were also asked to identify what proportion this represented. Respondents who answered negatively were directed to skip to Question #12. Those answering positively were directed to answer a detailed audit question providing the brand, type of gel, percent monomer, consumption (in gels per month) and the approximate cost per gel for all native PAGE, SDS-PAGE, gradient PAGE, electrofocusing, DNA PAGE and sequencing gels. Respondents who are not currently using ready-made gels at all were then asked to describe the reasoning behind their decision and whether they expect to start using these within the next 12 months.

This was followed by four questions regarding the use of handcast gel media. The first asks respondents to specify the forms of gel media products which are usually purchased from a list of five options including powdered acrylamide, liquid acrylamide, premixed powdered acrylamide-bis, premixed liquid acrylamide-bis and powdered agarose. The estimated annual spend on all forms of handcast gel media was also requested followed by the anticipated percent change in the usage of this media over the coming 12 months. In the final query on this area, researchers were asked to provide detailed audit data which included the brand and the percentage of total media budget for each type of medium (powdered acrylamide, liquid acrylamide, premixed powdered acrylamide, premixed liquid acrylamide, or powdered agarose) they usually purchase.

Brands of electrophoresis ready-made gels or media from which respondents refuse to purchase were also identified along with an explanation of the





reason for dissatisfaction with that supplier. Finally, respondents selected the top ranked electrophoretic gel and media supplier from a list of 9 major suppliers plus an 'other' category with regards to the following four key criteria: value for money, consistent quality, fast delivery and application support.

Major objectives of the survey were to estimate the present size of this market and to determine the present market share for three categories of electrophoretic instrumentation, ready-made gels and handcast gel media. This is based upon the projected unit and dollar volume of a comprehensive list of electrophoretic instrumentation purchased over the last five years, and the annual consumption of ready-made gels and gel media. There is a separate evaluation of electrophoretic chambers for protein separation and nucleic acid separation, power supplies, as well as ready-made gels and consumables for making hand-cast gels. The market's projected near-term growth rate in each of these areas is also estimated. Finally, a key objective was to identify the leading instrument manufacturers and consumable suppliers in terms of units sold and estimated dollar spend, and to look at their performance measured by respondent's satisfaction and by their ranking compared to other major suppliers to these markets.

The audit should permit the evaluation of our clients' present market positions, identify marketing strengths and weaknesses, and suggest strategies to develop or improve sustainable competitive advantage.

This report is the second 2004/2005 study in a growing series of market research analyses that began in 1993. We plan to continue the series, adding titles and alternating between U.S. and international markets, depending upon our clients' suggestions and support.

The first report published in this series covers the U.S. market for :

HPLC Columns in the Life Sciences

Reports published in the 2003/2004 series cover the following U.S. topics:

Molecular Biology Reagent Systems, Vol. 1
Molecular Biology Reagent Systems, Vol. 2
Protein Expression Systems
Proteomics Research, Volume 1 (Sample Prep & 2-D)
Proteomics Research, Volume 2 (Mass Spec & Protein Microarrays).

Reports released in the 2002/2003 series include the following U.S. topics:

DNA Amplification Instrumentation
DNA Amplification Reagents & Methodology
Microplate Reader & Equipment Market





Topics in the U.S. series published in 2001/2002 include:

Electrophoretic Instrumentation & Reagents
Molecular Biology Reagent Systems, Vol. 2

This series also includes the following reports covering international markets:

Densitometers & Image Analysis in Europe
DNA Sequencing in the Far East.

The 2000/2001 series covered the following three reports:

U.S. DNA Amplification
U.S. Molecular Biology Reagent Systems, Vol. 1
Molecular Biology Reagent Systems, Vol. 1 in the Far East.

In the 1999/2000 series, we have released three reports examining the following markets. These are:

Microplate Equipment in Europe
DNA Sequencing in the U.S.
Monoclonal Antibodies in the U.S.

The following nine titles have been released in the series for 1998/1999:

Cell & Tissue Culture in the U.S.
Cytokines & Growth Factors in the U.S.
DNA Amplification in the Far East
DNA Sequencing in Europe
Electrophoretic Gel Media in Europe
HPLC in the Life Sciences in the U.S.
Molecular Biology Reagent Systems, Vol. 1
Molecular Biology Reagent Systems, Vol. 2 in the Far East
Protein Expression Systems in the U.S.

The following titles have been released in the U.S. series for 1997/8:

DNA Sequencing
Molecular Biology Reagent Systems, Vol. 1
Molecular Biology Reagent Systems, Vol. 2
Molecular Diagnostics.

Clients are reminded that additional copies of any of these reports that have been purchased in the past are available at a modest cost. Please contact us for further details. Those wishing to know publication dates for any of these





reports, or wanting to read summaries of the 72+ reports in this series are invited to visit our Web site at: www.phortech.com.





B. SURVEY METHODOLOGY

E-mail invitations to take part in the survey were sent to a selected cross-section of life science researchers from our panel of over 5,000 US life science researchers. After selection for appropriate areas of interest, invitations were sent to a random selection of 2,174 U.S. members of the panel who have been in contact with us in the last year. Customized e-mail invitations to the web site survey were sent to selected individuals from March 30th to April 6th, 2004.

Each participant received an e-mail invitation including the web address of the survey and a unique validation code.

To improve response rates, respondents were able to select from a choice of eight prizes for completing the survey. These were a laser pointer, a AAA mini Maglite flashlight, a gift card good towards the purchase of a full pound of Starbuck's coffee, an Inova LED keychain microlight, a digital stopwatch, a stainless steel executive pocket knife, a \$5 gift card to Barnes & Noble bookstores, or a custom designed tee-shirt.

By the close of the survey on May 3rd and after duplicate responses and non-users, there were a total of 421 valid responses which translates to an 19.4% response rate. This substantially exceeded our expectations.

We did not observe any survey fatigue in this questionnaire, and felt that respondents spent considerable time explaining their positions on the open-ended questions. We have no reason not to believe that the survey is representative of the entire U.S. population of electrophoresis gel users.

Based upon 421 responses, the overall statistical results presented in this report are accurate to within ± 4.8 percentage points at the 95% confidence level. In cases where we only calculate the percentage of the 234 respondents currently using ready-made gels, the statistical results are accurate to within $\pm 6.4\%$. Where we calculate the percentage of the 377 respondents that currently use hand-cast electrophoretic gels, the results are accurate to $\pm 5.0\%$.

In our experience, 95% confidence levels are appropriate primarily for scientific experiments. Most business people making decisions are content to be right more often than they are wrong. In this case, a 65% confidence level, (in which you would be right twice as often as you would be wrong) is appropriate. Conveniently, 65% confidence levels are nearly exactly one half the size of the 95% level, thus our 65% levels would be $\pm 2.4\%$ for all respondents and $\pm 3.2\%$ for all ready-made gel users, and $\pm 2.5\%$ for researchers pouring their own gels.





According to the binomial distribution theory, these values are valid when the measured event has about a 50% probability. When the measured event is considerably more rare than this, the corresponding confidence intervals get smaller. On the other hand, these confidence intervals are valid for answers based upon the complete pool of respondents. When analyzing data for a group that includes only a small segment of respondents, the answers are less certain and confidence intervals are correspondingly larger.

In this report, we will calculate more exact individual confidence intervals when appropriate. In our comments, we will note whether given differences are significant at either the 65% or 95% level. To aid our clients in determining the appropriate confidence interval for various combinations of sample size and measurements, we have created the following table. Just read the closest percentage on the left and find the closest sample size column. The intersection will show the confidence interval for that combination. For example, a measured 35% value with a sample size of 200 has a 95% confidence interval of $\pm 6.6\%$.

95% Confidence Intervals for Various Percentages & Sample Sizes

Percent	n=10	n=20	n=50	n=100	n=200	n=500	n=1000
5%	$\pm 13.5\%$	$\pm 9.6\%$	$\pm 6.0\%$	$\pm 4.3\%$	$\pm 3.0\%$	$\pm 1.9\%$	$\pm 1.4\%$
10%	$\pm 18.6\%$	$\pm 13.1\%$	$\pm 8.3\%$	$\pm 5.9\%$	$\pm 4.2\%$	$\pm 2.6\%$	$\pm 1.9\%$
20%	$\pm 24.8\%$	$\pm 17.5\%$	$\pm 11.1\%$	$\pm 7.8\%$	$\pm 5.5\%$	$\pm 3.5\%$	$\pm 2.5\%$
35%	$\pm 29.6\%$	$\pm 20.9\%$	$\pm 13.2\%$	$\pm 9.3\%$	$\pm 6.6\%$	$\pm 4.2\%$	$\pm 3.0\%$
50%	$\pm 31.0\%$	$\pm 21.9\%$	$\pm 13.9\%$	$\pm 9.8\%$	$\pm 6.9\%$	$\pm 4.4\%$	$\pm 3.1\%$
65%	$\pm 29.6\%$	$\pm 20.9\%$	$\pm 13.2\%$	$\pm 9.3\%$	$\pm 6.6\%$	$\pm 4.2\%$	$\pm 3.0\%$
80%	$\pm 24.8\%$	$\pm 17.5\%$	$\pm 11.1\%$	$\pm 7.8\%$	$\pm 5.5\%$	$\pm 3.5\%$	$\pm 2.5\%$
90%	$\pm 18.6\%$	$\pm 13.1\%$	$\pm 8.3\%$	$\pm 5.9\%$	$\pm 4.2\%$	$\pm 2.6\%$	$\pm 1.9\%$
95%	$\pm 13.5\%$	$\pm 9.6\%$	$\pm 6.0\%$	$\pm 4.3\%$	$\pm 3.0\%$	$\pm 1.9\%$	$\pm 1.4\%$



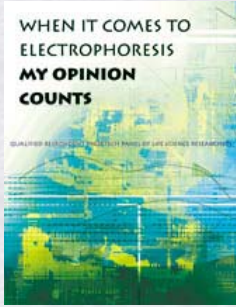


VII. THE QUESTIONNAIRE





2004 Electrophoretic Equipment & Media Survey



Thank you for taking time to answer our survey questionnaire. This survey is for researchers currently using electrophoresis in their work. We estimate that completing this survey will take you 11 minutes or less.

We will be pleased to send your choice of a nice selection of *free* gifts as a thank you for taking part in the survey. You can choose between a new limited edition tee shirt with the message "When it comes to electrophoresis, my opinion counts" (in XL only). The specially commissioned graphic is shown at left.

You can also select a gift card good for a full pound of Starbucks coffee (House Blend), our quality laser pointer (a great gift item), a AAA mini Maglite flashlight (new designer color), a brilliant LED Inova keychain microlight, a nice digital stopwatch (great for measuring the elapsed time of experiments), a stainless steel executive pocket knife, or a \$5 gift card to Barnes & Noble, good towards a book, CD, or cup of coffee on us. Please be sure to select your choice of free gift near the end of the survey. Thank you for participating.

0. To begin, please enter the validation code from your invitation letter here.

1. Do you currently analyse protein or nucleic acid samples by electrophoresis?

- Yes
- No (*Sorry. Please stop now by hitting your browser's BACK button*)

2. Which electrophoretic techniques do you presently use? (*Please check ALL that apply*)

- SDS PAGE
- Native PAGE
- Urea PAGE
- Electrofocusing
- 2-D electrophoresis
- Electro blotting
- Submarine
- Manual DNA sequencing
- Mutational analysis
- Preparative
- Pulsed field
- Other:

The next series of questions deals with the electrophoresis chambers you use. Please take your time and fill in the tables carefully and completely.

3. Please list the brands and models together with quantity and year acquired for all protein electrophoresis chambers you have purchased in the past 5 years, beginning with the most recent. Select the best product category.

Chambers for Protein Electrophoresis (*Please list most recent first*).

Brand	Model	Quantity	Year	Category
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="button" value="v"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="button" value="v"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="button" value="v"/>

4. Please list the brands and models together with quantity and year acquired for all nucleic acid electrophoresis chambers you have purchased in the past 5 years, beginning with the most recent. Select the best product category.

Chambers for Nucleic Acid Electrophoresis (*Please list most recent first*).

Brand	Model	Quantity	Year	Category
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="button" value="v"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="button" value="v"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="button" value="v"/>

The next series of questions deals with the power supplies you use. Please take your time and fill in the table carefully and completely.

5. Please list the brands and models together with quantity and year acquired for all power supplies you have purchased in the past 5 years, beginning with the most recent acquisition. Please list the maximum voltage each can deliver and whether the power supply is used for protein and/or nucleic acid electrophoresis.

Electrophoresis Power Supplies (*Please list most recent first*).

Brand	Model	Quan	Year	Max V	Used for:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Nucleic Acids <input type="checkbox"/> Proteins
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Nucleic Acids <input type="checkbox"/> Proteins
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> Nucleic Acids <input type="checkbox"/> Proteins

The next series of questions concerns electrophoresis instrumentation in general.

6. Are you planning to purchase any new electrophoresis instrumentation over the coming 12 months?

Yes No

If yes, please describe the brand(s) and model(s) under consideration.

Brand(s): Model(s):

7. Are there brands of electrophoresis instrumentation you wouldn't buy?

Yes No

If yes, which brand(s) and why?

Brand(s): Because:

8. From the alphabetic list of electrophoresis instrumentation manufacturers, please mark the one you would rank highest in each area. (You may choose a manufacturer more than once).

Criteria	Manufacturer
a. Easiest to use	Select one: <input type="text"/>
b. Most reliable quality	Select one: <input type="text"/>
c. Best value for money	Select one: <input type="text"/>
d. Highest versatility	Select one: <input type="text"/>
e. Best service/support	Select one: <input type="text"/>

The next series of questions concerns precast, or ready-made gels for electrophoresis.

9. Do you currently use precast (ready-made) gels for electrophoresis?

Yes, exclusively.
 Yes, for % of my work
 No, I do not use ready-made gels. (Proceed to question 12)

10. Which brand and type of ready-made gels do you usually purchase? What percent monomer are they? How many gels do you use per month and what is the average price per gel?

Precast Gels (Please begin with your most frequently-run gels).

Brand and Type	% Monomer	Gels/mo	Price/gel	Technique
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Select one: <input type="text"/>

11. What percent change do you foresee in your use of ready-made gels over the coming 12 months? (Please enter an estimate, indicate if positive or negative, and explain)

% Increase Decrease No change

Reason:

12. If you have not used ready-made gels up to now, please explain the reason(s) why.

Reason(s):

Do you expect to begin using ready-made gels within the next 12 months?

Yes No

The next series of questions concerns your use of handcast gels for electrophoresis.

13. Which of the following types of hand-cast gel media do you usually purchase?(Please check all that apply)

- Powdered Acrylamide
 Liquid Acrylamide
 Premixed Powdered Acrylamide-bis
 Premixed Liquid Acrylamide-bis
 Powdered Agarose

14. How much do you estimate you spend on handcast gel media, including liquid and powdered acrylamide and agarose, in a typical year?

\$ per year on average, for all handcast gel media.

15. What percent change do you foresee in your use of handcast gel media over the coming 12 months? (Enter estimate as a percentage and note whether it is an increase or decrease).

% increase decrease no change

16. For each handcast gel media you use, identify the supplier, and indicate the percent of your total handcast gel media budget you spend with that supplier. (Please begin with your major suppliers).

Medium	Supplier	% Total Gel Media Budget
a. <input type="text" value="Select one:"/> ▼	<input type="text"/>	<input type="text"/>
b. <input type="text" value="Select one:"/> ▼	<input type="text"/>	<input type="text"/>
c. <input type="text" value="Select one:"/> ▼	<input type="text"/>	<input type="text"/>
d. <input type="text" value="Select one:"/> ▼	<input type="text"/>	<input type="text"/>

The next two questions concerns electrophoresis gels and media suppliers in general.

17. Are there brands of electrophoresis gels and media that you wouldn't buy?

Yes No

If yes, which brands and why?

Brand:

Reason:

18. From the alphabetic list of electrophoretic gel and media suppliers, please mark the one you would rank highest in each area. (You may choose a supplier more than once)

Criteria	Manufacturer
a. Best value for money	<input type="text" value="Select one:"/> ▼
b. Most consistent quality	<input type="text" value="Select one:"/> ▼
c. Fastest Delivery	<input type="text" value="Select one:"/> ▼
d. Best application support	<input type="text" value="Select one:"/> ▼

Finally, a few questions about yourself and the laboratory in which you work.

19. How would you best describe your organization?

▼

20. If you are located in industry, please specify the type of industry you are working in.

▼

21. Do you work in a core facility or centralized lab that analyzes samples for others to interpret?

yes no

22. What is your professional position?

▼

23. How many years of experience have you had with electrophoresis techniques?

years

24. How are you involved (either personally or as a member of a group) in the purchase of electrophoresis products for your organization? (Please check ALL that apply).

- initiate/determine need
- specify/set standards
- evaluate/select suppliers
- approve/authorize purchase
- other:
- no involvement

OK, now, please choose your free gift:

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Department:	<input type="text"/>
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Note. Invite your qualified colleagues in other laboratories to respond. Just have them enter their initials as their validation code. But remember, you *must* clear the form and start over. Near duplicate (or largely unanswered) entries are automatically deleted by the system.