



Gene Expression Profiling Market Leaders Retain Share of Key Market Segments

However tier two suppliers capture share from smaller competitors in several market segments revealed in Percepta Associates' new Gene Expression Profiling Life Science Dashboard™ market research report

Carlsbad, Calif. – May 5, 2010 - [Percepta Associates](#) Inc. announces the release of Series Three of its [Gene Expression Profiling Life Science Dashboard™](#) market research report. Unique to the Percepta report, Series Three offers comparisons to the findings of Series One (February 2007), and Series Two (April 2008). Percepta's survey of active global life science researchers revealed that Life Technologies' (NYSE:LIFE) Applied Biosystems division and Affymetrix (NASDAQ: AFFX) are maintaining their leads in the quantitative real-time PCR and microarray market segments respectively. Roche Applied Sciences (VTX: ROG.VX) is reported to be capturing share in both gene specific and non-specific labeling for quantitative real-time PCR segments analyzed. The Roche share gain is coming from 3rd and 4th place suppliers. Agilent Technologies (NYSE:A) and Illumina both continue to capture market share in the microarray segment even as Affymetrix holds steady, as other niche suppliers appear to be in decline. Bio-Rad Laboratories (AMEX: BIO) remains a strong player in several relevant segments.

Product segments analyzed in Series Three of the new [Gene Expression Profiling Life Science Dashboard™](#) include:

- Differential gene expression studies using multiplex PCR
- Microarray-based gene expression studies
- qRT-PCR (cDNA template) using gene specific fluorescent probe
- qRT-PCR (cDNA template) using non-specific SYBR® Green
- Northern blot analysis
- Serial Analysis of Gene Expression (SAGE) studies
- Transcriptome studies using tiling arrays
- Transcriptome studies via short-read sequencing
- Digital gene expression/molecular barcodes (NEW in this study)

Gene expression profiling methods enable the detection and measurement of multiple expressed gene transcripts in a single RNA sample. Continually evolving methods, such as

microarray analysis, multiplex PCR and quantitative real-time PCR, are integral to deciphering the molecular mechanisms involved in gene function, biological development and disease progression, and are important tools in the discovery and development of new drug targets and diagnostic biomarkers. New tools such as transcriptome studies via short read sequencing or tiling arrays, while not yet uniformly adopted, are growing at attractive rates and may represent excellent opportunities for life science suppliers.

Satisfaction with products offered by the leading suppliers has increased markedly over the 2008 Gene Expression Profiling Dashboard, with a corresponding decline in the percentage of scientists that have switched suppliers over the past six months for several key market segments. ***“The market leaders seem to be cementing their positions in large, mature segments such as qRT-PCR and microarray analysis. These suppliers have fine-tuned their product offerings and developed savvy technical support staff – as a result, customer loyalty to these suppliers appears to have increased measurably over the last 18 months,”*** said Mike Klein, Principal at Percepta. ***“It appears that scientists are tending to choose the two or three tried and true suppliers in these more mature segments and are achieving successful results, to the detriment of the next tier of companies.”***

To view gene expression profiling market research sample data and questionnaires visit:
http://www.perceptaassociates.com/publications/10_gene_expression_overview.shtml

[Life Science Dashboards™](#) are readily accessible sources of current, segment-specific, market research. Designed and implemented by industry veterans, each dashboard provides key life science market indicators compiled from the survey responses of qualified decision-makers and researchers actively using life science research products. Unlike other market research reports, Percepta's Dashboards feature an “at-a-glance” format that provides rapid access to actionable key market indicators in an easy to understand framework, including:

- Market size
- Market share
- Market growth and sample/reaction throughput rates
- Customer satisfaction
- Propensity to switch
- Competitive intensity
- Perceived pricing
- Top suppliers
- Technique usage frequency
- Fastest growing techniques

- Primary downstream applications

About Percepta

Founded in 2005 in Carlsbad, California Percepta Associates serves a rapidly growing roster of bioscience clients globally. Percepta is a specialized consultancy providing expert market research, strategic business planning, portfolio management, product and corporate branding and marketing communications services. Percepta also publishes the [Trends & Opportunities in Early Growth Markets](#) series of reports providing perspectives on the dynamic nature of early growth markets for supply companies and investors. For more information visit: www.perceptaassociates.com

CONTACT:

Percepta Associates Inc.

Mike Klein

Principal

Phone: 760 597 9236