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NON-ARRAY TRANSCRIPTOMICS: A STRATEGIC MARKET OUTLOOK AND ANALYSIS

With maturing market status, focus is shifting from innovation in gene expression to utilization in clinical diagnostics and drug discovery.

July 16, 2003, San Mateo, Calif. — The non-array transcriptomics market is maturing quickly with a number of advanced and refined technologies such as Applied Biosystems' TaqMan and Roche Diagnostics' LightCycler. According to Front Line Strategic Consulting, Inc.'s report, *Non-Array Transcriptomics: A Strategic Market Outlook and Analysis*, the most current leading technologies are real-time PCR and SAGE, which serve the research communities with high-throughput capacity and convenience. With the inevitable completion of the transcriptome, applications for novel gene discovery will decrease as emphasis will shift toward clinical diagnostics and drug discovery.

Front Line's report includes an in-depth analysis of current transcriptomics technologies and their applications in academic research and drug discovery. The report also notes that non-array transcriptomics technology is a relatively mature field with potential for growth in clinical diagnostic applications. The estimated market size of non-array transcriptomics technologies is \$245M in 2003, and is expected to reach \$475M in 2008, according to Front Line's market model. The growth of the market will be moderate and steady as the rate of introduction of novel products is likely to slow in the next five years.

“The future growth of the non-array transcriptomics market will be driven by applications in the molecular diagnostics and drug discovery sectors. However, a

decrease in the rate of innovation will be the greatest challenge suppliers of the technology will face in coming years,” says Eric Manning, Ph.D., analyst, strategic market reports for Front Line.

About Front Line

Headquartered in San Mateo, Calif., Front Line is a leader in strategic consulting and market analysis for the Life Sciences industries, offering strategic business intelligence through exclusive consulting engagements and comprehensive strategic market reports of key therapeutic and technology areas. Front Line was founded in 1992 and specializes in combining diligent research methodology with intelligent strategic planning for their pharmaceutical and biotechnology customers. www.frontlinesmc.com

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