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WallStreet Research: Pressure BioSciences, Inc. (OTCQB:PBIO)

Big Turnaround May Lead to Big Returns

Obtaining market share is key to a company's success in a competitive industry, and the Boston-based laboratory tools company Pressure BioSciences, Inc. just launched a vastly improved second generation product that can potentially take over a significant chunk of the biological sample preparation market, where it already commands an impressive 150 clients, many of whom are key opinion leaders.

The Market and PBIO's Role in It

The sample preparation market, which consists of tens of thousands of laboratories, currently relies on technology that apply mechanical or chemical manipulation to prepare the sample for study. These methods often lead to unwanted contamination and breakdown of the samples. Unlike other sample preparation companies, PBIO utilizes a patented technology known as Pressure Cycling Technology (PCT) which applies calculated amounts of pressure toward the sample to carefully break down cellular structures and release biomarkers. PCT allows for far more control and accuracy in sample preparation than other methods and has numerous practical applications in fields such as drug, vaccine, and cancer studies.

Products and the Situation

Pressure BioSciences owns a line of PCT-based products (instruments and related consumables) such as the Barocycler instrument series that range in price (\$25,000 - \$65,000) based on features available and pressure limits. While widely adopted by prestigious research facilities and even used by prominent scientific figures like Dr. Wayne Hubbell (UCLA) and Dr. Jennifer Van Eyk (Cedars-Sinai), the technology has not yet caught commercial success due to the products' inability to accept standard disposable microwell strips, the most commonly used processing containers for sample preparation worldwide. PBIO, however, has recently developed a breakthrough product that will allow the company to expand into that market.



The Turnaround

In June 2014, Pressure BioSciences launched the High Throughput Barocycler, a PCT-based sample preparation instrument system that applies pressure to disposable microwell strips. With this instrument, PBIO will be able to market their PCT platform as not only more efficient and controllable than the techniques of competitors, but also readily adaptable for quicker commercial applications. We here at WallStreet Research believe the development of the new Barozyme HT48 system will help PBIO potentially sell far more units and consumables than previous years.

Going Forward

As of the recent earnings report, Pressure BioSciences reported significant increases in the sale of products and services year-over-year, up +29% to \$1,350,150 in 2014 versus \$1,046,678 in 2013. While the recent year shows continuing and promising revenue growth, those sales numbers mostly represent sales of PBIO's older PCT instruments. Thus, the 29% year-over-year growth in 2014 has not even factored in the massive sales potential the High Throughput Barozyme HT48 and other recently developed products can bring to the table in the future. Still, achieving the anticipated growth is dependent on the company's ability to continue to obtain financing. As a result, PBIO may be able to reach previous highs in the \$1.60-\$2.00 range. At the current price of \$0.33, we rate PBIO shares a speculative BUY.

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