

THE INFECTIOUS DISEASE MARKET MONITOR™



a marketing information development company

The Infectious Disease MARKET MONITOR™ is a tracking study designed to support the marketing decision maker focused on the infectious disease testing market. It focuses on both manual kit and automated testing.

Primary issues addressed in this report include:

1. The size of the market
2. The performance of manufacturers providing the products used to conduct these tests.

Published annually, the Infectious Disease MARKET MONITOR™ addresses testing for selected analytes in four primary market segments:

1. Hospitals
2. Commercial Laboratories
3. Public Health Laboratories
4. Blood Donor Centers

Data Collection

One of every five clinical laboratories in the domestic market currently participate in this tracking study. More than 1,400 laboratories return completed questionnaires via the mail each year. A mail survey technique is employed as this approach facilitates the need to look up test volume data or consult with colleagues regarding systems in use. The mail survey method also permits the study respondent to complete the questionnaire at a convenient time thus ensuring as thoughtful a response as possible.

A stabilized sample, with 90 percent of the same facilities reporting from cycle to cycle, provides a highly sensitive measure of change from year to year. It is possible to accurately estimate changes in demand for each test from year to year or shifts in market share between periods for manufacturers serving this market sector.

Test Groups Included In The Study

- Hepatitis
- Retrovirus
- Sexually Transmitted Diseases
- Other Infectious Disease Tests

*See the reverse side of this sheet for specific analytes.

Contents

Market Size

Account Potential:	Number of accounts performing tests within each discipline
In-House Menu:	Number of accounts performing each analyte in-house
Demand:	Number of results reported per year by analyte
Growth Rates:	Year to year comparison of result volume (subsequent cycle)

Competitive Performance

Client Base:	Number of accounts using each manufacturer's analyzers/reagents
Volume Share:	Number of test results reported using each manufacturer's testing products
Share Change:	Volume share position compared with previous year

Segmentation

Hospital:	Reported by four bed size categories
Commercial Lab:	Reported by three volume categories
Blood Donor Center:	Reported by Red Cross and community donor centers
Public Health Lab:	Large state centers represented



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Analytes Included In The Study

Hepatitis	HBsAg • HBsAg Confirmatory • HBeAb • HAV Ab • HBsAb • HBeAg • HAV IgM • HBcAb • HBcIgM • HBV Qualitative (NAT) • HCV • HCV Qualitative (NAT) • HCV Quantitative (NAT) • HBV Quantitative (NAT)
Retrovirus	HIV Ag/Ab Combo • HIV I Ab • HIV II Ab • HTLV II Ab • HIV I Ab Rapid • HIV I/II Ab • HTLV I/II Ab • HIV I Ag • HTLV I Ab • HIV I Qualitative (NAT) • HIV I Quantitative (NAT)
Sexually Transmitted Diseases	Chlamydia • Gonorrhea • HPV • HSV • Syphilis • Trichomoniasis
Other Tests	C. Difficile • EBV • Giardia Antigen • H. Pylori • Chagas (T. Cruzi) • Legionella • Lyme • RSV • Rotavirus • West Nile Virus • Group A Strep • Group B Strep • MRSA • CMV IgG Ab • CMV IgM Ab • CMV Total Ab • Rubella IgG Ab • Rubella IgM Ab • Toxoplasmosis IgG Ab • Toxoplasmosis IgM Ab

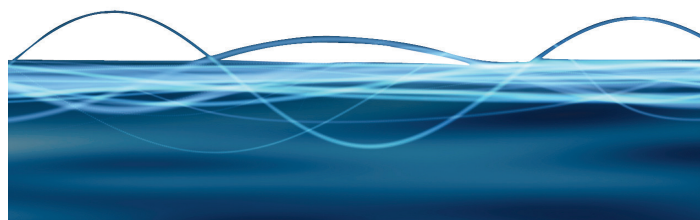
Approximate Sample Composition

Market Segment	Number In Universe	Number In Sample	Sample As Percent Of Universe
Hospitals	5,122	1,064	20.8
Commercial Laboratories	732	299	40.8
Blood Donor Centers	64	27	42.2
Public Health Laboratories	200	73	36.5
Total	6,118	1,463	23.9

2010 Pricing Report (18th Cycle)

Hepatitis Section	\$16,200
Retrovirus Section	\$16,200
Sexually Transmitted Diseases Section	\$13,450
Other Tests Section	\$28,275
Total Report (All Sections Included)	\$74,100

Data for the 2010 Infectious Disease MARKET MONITOR™ is collected in December, 2010 and reflects the market as of the fourth quarter of 2010.



Tests in the Other Tests Section (only) may be purchased separately at a cost of \$2,415 per test.