AGING POPULATION PROPELS RISE in Worldwide Market for Diagnostic Imaging Products

In 2001, more than a billion medical imaging procedures were performed worldwide. Medtech Insight's report, The Worldwide Market for Diagnostic Imaging Equipment, expects the relevance of imaging to the practice of modern medicine to continue to increase in the future because of the rapid aging of the global population and subsequent rise in prevalence of many age-related diseases such as cancer, cardiovascular disease, and neurological disease.

Another factor that is expected to play a role in the expansion of diagnostic imaging is the increasing sophistication of core imaging and digital processing techniques that result in improved accuracy, tissue specificity, reduced procedure times, synergetic fusion of anatomical and functional variables, and streamlined patient-data management. In addition, a rapidly growing body of knowledge on human genomics and biomolecular signaling mechanisms and pathways is expected to open opportunities for the application of novel diagnostic-imaging techniques in the preemptive detection of functional genetic aberrations and abnormalities.

The global market for diagnostic-imaging equipment, which encompasses computed tomography, magnetic resonance imaging, nuclear medicine imaging, ultrasonography, and conventional x-ray-based systems, totaled more than $14.5 billion in 2002 and is projected to reach nearly $16.5 billion in system sales by 2006.

Technical simplicity, availability, and affordability, mean conventional x-ray and ultrasound-based systems are the imaging tests most frequently performed and these two modalities are projected to account for more than 50% of the total worldwide imaging market. Sales of diagnostic-imaging equipment in industrialized nations account for more than 80% of the worldwide diagnostic-imaging market, according to the report.

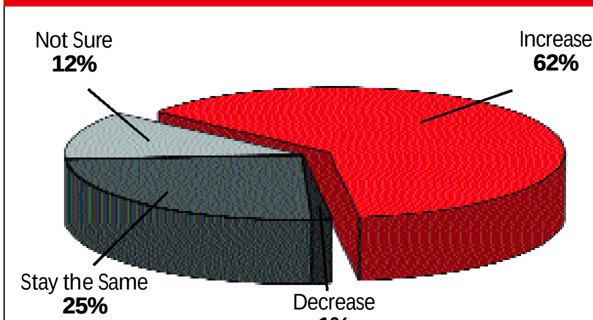
INCREASE IN RNAi RESEARCH to Propel Market for Reagents

The market for reagents and kits to support RNAi research is expected to grow, according to BioInformatics LLC's report, The Market for RNA Interference Kits and Reagents. The report details the results of a survey of 816 scientists who described their current and planned research using a technique that could revolutionize biomedical research and speed the development of new drugs.

RNA interference (RNAi) is the process whereby cells use pieces of short double-stranded RNA (dsRNA) to prevent the expression of specific genes by disrupting the process of mRNA translation to proteins. The ability of small interfering RNAs (siRNAs) to suppress gene expression and the subsequent application of this technology, not only to functional genomics but also to target validation,speak to its enormous potential as a drug-discovery tool.

According to BioInformatics, assigning gene function,creating *in vivo* knock-outs, and validating new drug targets are the three most common objectives of RNAi researchers. Scientists planning to enter the field in the next year say they will pursue the same objectives.

HOW WILL THE NUMBER OF RNAi EXPERIMENTS CONDUCTED IN THE LABORATORY CHANGE DURING THE NEXT 12 MONTHS?



Source: The Market for RNA Interference Kits & Reagent, BioInformatics LLC

Growth in the market for reagents and kits to support RNAi research will be driven not just by new scientists adopting the technology but also by the pace at which they expect to conduct their research;62% of the scientists surveyed expect their number of RNAi experiments to increase during the next year with 59% of them anticipating an increase of more than 40%.

Analysis Rates ROCHE SALESFORCE AS MOST EFFECTIVE in the Pharmaceutical Industry

In a recent analysis by Health Strategies Group Inc., Roche was rated as having the most effective salesforce among 22 pharmaceutical companies

"The increasing competition for time with physicians means that pharmaceutical companies need to focus on field-force effectiveness," says Health Strategies Group principal Rayna Herman. "In our study, Roche's sales representatives had more calls result in physician contact and, more importantly, they had more effective discussions with the physician. Effec-

SALES EFFECTIVENESS BY COMPANY

2002 Rank	Company	% of Calls with Effective Approaches*
1	**Roche**	47%
2	**Novartis**	45%
3	**Bristol-Myers Squibb**	39%
4	**Aventis**	39%
5	**Lilly**	38%
6	**GlaxoSmithKline**	37%
7	**Pharmacia**	37%
8	**Forest**	36%
9	**Schering-Plough**	36%
10	**Abbott**	36%
11	**J&J (ex-Janssen)**	36%
12	**Procter & Gamble**	35%
13	**Pfizer**	35%
14	**Merck**	35%
15	**Sanofi-Synthelabo**	35%
16	**Takeda**	34%
17	**AstraZeneca**	33%
18	**TAP**	32%
19	**Janssen**	32%
20	**Wyeth**	29%
21	**Boehringer-Ingelheim**	27%
22	**Bayer**	26%
	Industry Average	**35%**

*Effectiveness measures how representatives conduct calls with physicians, including the use of dialogues, resources, and content most relevant for physicians.
Source: SFE Monitors 2.2 and 3.1, Health Strategies Group Inc., 2002.

tive discussions are more relevant for physicians; they keep physicians abreast of the latest developments in new treatment options, help physicians provide value to their patients, and ultimately encourage prescriptions and sales."

Health Strategies Group created the Sales Force Effectiveness (SFE) Monitor, a proprietary instrument, to determine the effectiveness of pharmaceutical salesforces by measuring access and the impact of their communications with physicians (discussion effectiveness). The SFE Monitor compares 22 companies vying for the attention of high-prescribing primary-care and specialty physicians. The analysis reflects more than 30,000 representative-physician interactions.

PHYSICIANS RATE PHARMA COMPANIES on Practice Needs

Six of 12 physician specialty segments surveyed rated Pfizer Inc. as the company that best supports the overall needs of their practices, according to recent information collected by Health Products Research Inc. (HPR).

HPR's Metropolitan Area Promotional Audit (MPA) — a monthly service providing insights into pharmaceutical/healthcare company promotional activities and salesforce structure — asked more than 10,000 physicians to identify the top three companies best supporting the overall needs of their practice.

COMPANIES BEST SUPPORTING THE OVERALL NEEDS OF PHYSICIAN PRACTICES, BY SPECIALTY

Specialty	1.	2.	3.
GENERAL/FAMILY	Pfizer	Merck	GlaxoSmithKline
PEDIATRICIANS	GlaxoSmithKline	Pfizer	Ross Products
CARDIOLOGISTS	Pfizer	Merck	Bristol-Myers Squibb
PULMONARY DISEASE	GlaxoSmithKline	Merck	Pfizer
HEMATOLOGY/ONCOLOGY	Amgen	Aventis	Novartis
ALLERGISTS	GlaxoSmithKline	Aventis	Schering
OB/GYNS	Ortho-McNeil Pharma	Wyeth	Pfizer
NEUROLOGISTS	Pfizer	GlaxoSmithKline	Novartis
PSYCHIATRISTS	Pfizer	Lilly	GlaxoSmithKline
INTERNISTS	Pfizer	Merck	Novartis

Source: Health Products Research Inc.

Survey Shows Consumers Interested in Self Care USE DTC ADS FOR INFORMATION

Prevention magazine's 6th National Survey on Consumer Reaction to DTC Advertising has revealed consumer attitudes toward direct-to-consumer advertisements.

Results for 2002 show that consumers prefer to self treat themselves, with 74% responding that they treated themselves with over-the-counter drugs or other remedies before calling a doctor; 62% avoid prescription medicines whenever they can; 72% feel comfortable questioning treatments their doctor recommends; 57% get regular screenings such as blood pressure and cholesterol checks; and 50% make an active effort to stay informed about health issues.

The survey also found that 19% of consumers — 38 million — use sources mentioned in broadcast ads. Of those people, 39% sought information for a prescription product they had never used before, 30% searched for information for someone else, 14% looked for information about a drug they had just started taking, and 8% looked for information for a drug they had been taking for a while. The survey additionally revealed that 33%, or 66 million consumers, talked to a doctor about a drug because of a DTC ad.

"Consumers value DTC advertising because it helps them learn about medical conditions they, or their family and friends, may have, and about new treatments for them," says Ed Slaughter, corporate director of market research for Rodale Inc., publisher of *Prevention* magazine. "And, DTC seems to be doing this at a time when consumers are interested in taking a larger role in the management of their own care."

The survey concludes that the population is getting older and is aware of DTC advertising. A strong self-care movement among consumers is accompanied by generally positive opinions of DTC. The study additionally concludes that while the level of prescription requests remains unchanged, there is no evidence of consumers "demanding" advertised medicines, and that there is no change in the number of people using prescription medicines or in the number of prescription medicines being used.

CONSUMER OPINION REGARDING DTC

- **84%** tell people about new treatments
- **83%** encourage people to find out more about the condition an advertised prescription treats
- **80%** alert people to symptoms of condition
- **64%** done responsibly by industry
- **61%** scares people into thinking they have conditions they don't really have
- **36%** cause tension between doctors and patients

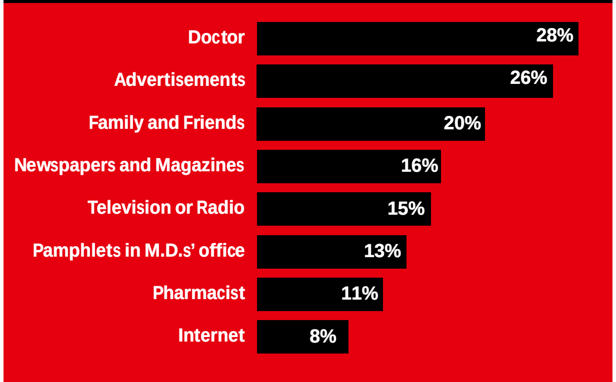
Source: Prevention magazine, 6th National Survey

DTC Ads Found to Help IMPROVE HEALTHY BEHAVIOR

The high visibility of DTC ads can help patients uncover undiagnosed conditions, according to The Public Health Impact of Direct-to-Consumer Advertising of Prescription Drugs, a study from researchers at Harvard Medical School and Harris Interactive.

The research project included a telephone survey of 3,000 U.S. adults, a mail survey of 600 physicians, and an online survey of 6,000 individuals with selected chronic conditions. The aim of the study was to gauge the impact of the ads on consumers' health. Among the 86% of respondents who saw or heard an ad in the last year, about 20% of patients received a new diagnosis as a result of their visit. More than a third of new diagnoses and half of existing conditions were considered high priority.

PERCENTAGE OF ADULTS WHO RECEIVE HEALTHCARE INFORMATION "OFTEN" FROM THE FOLLOWING SOURCES



Source: Harvard Medical School and Harris Interactive

Researchers also found that patients with previously diagnosed conditions, such as high cholesterol, high-blood pressure, diabetes, and depression were prompted by ads to discuss new treatment options. It also triggered several types of follow ups by the doctor, including a new prescription, lab tests, referrals to a specialist, and suggestions on how to improve health through lifestyle changes.

Overall, even though these ads are controversial, researchers found that there were several benefits and no drawbacks for patient health.

In fact, the study found that about four of five reported feeling better after taking the drug, and a similar proportion reported that symptoms improved and that results of lab tests showed a change for the better.

The study's authors concluded that there are positive medical and health effects of DTC ads, including motivation to engage in healthy behavior and motivation to discuss personal health problems and issues with physicians.

METABOLIC DISEASE DRUG MARKET TO GROW to $14 Billion in 2007

Decision Resources forecasts that the metabolic disease drug market will grow from $9 billion in 2001 to $14 billion in 2007.

"Eli Lilly & Co. and Bristol-Myers Squibb dominated the metabolic drug market for diseases such as diabetes (type I and type II) and obesity," says Christine Blazynski, Ph.D., director, Decision Resources. "However, there are emerging players in this market who will garner significant market share by the year 2007. Pfizer, Merck & Co., and Amylin Pharmaceuticals all have pipelines with the potential to grow the market and cut into the major players' current market share."

According to the report, the largest driver for the metabolic disease market is the growth in prevalence of overweight and obese people, as well as those with diabetes.

PRESCRIPTION DRUGS FASTEST-GROWING SEGMENT of Overall National Health Expenditures

In 2001, prescription-drug spending in the United States totaled $141 billion, or 10% of national health expenditures. Prescription drugs are the fastest-growing segment of overall national health expenditures, according to the CMS Health Care Industry Market Update, which is published at the direction of, and solely for the benefit of, the Centers for Medicare and Medicaid Services (CMS) and the U.S. Department of Health and Human Services (HHS) and interested healthcare policy makers in the Congress, the federal agencies, and state governments.

From 2000 to 2001, total national health expenditures grew 8.7% from $1.31 trillion to $1.42 trillion. Prescription drug spending grew 15.7%, from $122 billion to $141 billion. In contrast, hospital care grew 8.3%, physician and clinical services grew 8.6%, and nursing-home care grew 5.5%. Although drug spending has grown nearly twice as fast as all other health services since 1995, growth has moderated recently amid a deceleration in the rate of new product introductions and cost-containment driven by tiered formularies.

CMS' Office of the Actuary projects national drug spending will reach 14.2% of total national health expenditures in 2010. Analysts attribute the rising prescription drug expenditures to a variety of factors, including increased use, an aging population, development of new therapeutic agents for chronic conditions, consumer demand, and rising drug prices.

While drug spending has been the fastest growing component of national health expenditures, the increase in hospital-care spending was the largest dollar component of national health expenditure growth. In 2001, hospital spending grew 8% to $451 billion.

Pharmacogenomics to CHANGE INDUSTRY'S ROLE in Post-Genomic Era

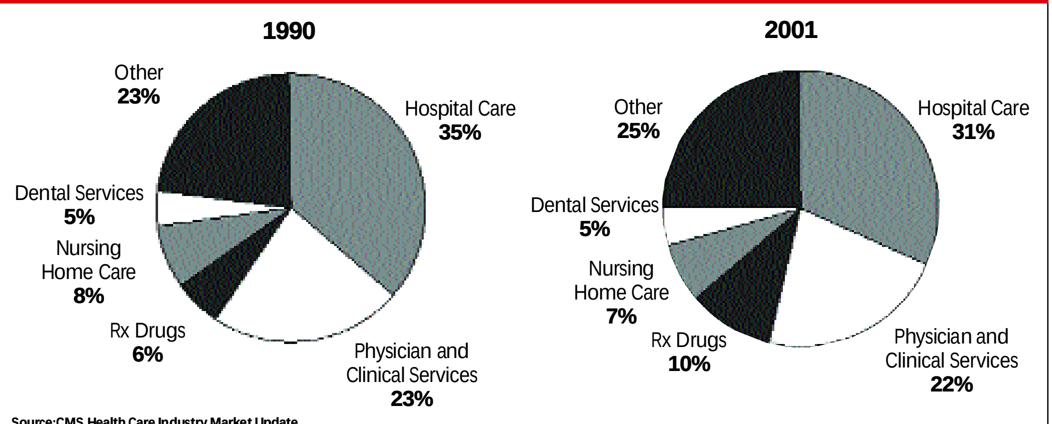
Datamonitor analysis reveals that pharmaceutical companies need to adopt a new outlook in their sales and marketing operations to optimize the uptake of pharmacogenomics-based therapies. This includes increasing contact and reach with patients to create a demand for personalized medicine; addressing the physician knowledge gap between genomics and medical practice; and convincing healthcare payers about the cost and efficiency of customized treatments.

Genotype-based medicine is predicted to increase patients' knowledge about their predisposition to disease, according to the Datamonitor report, Personalized Medicine: The Impact of Pharmacogenomics on Pharmaceutical Sales and R&D.

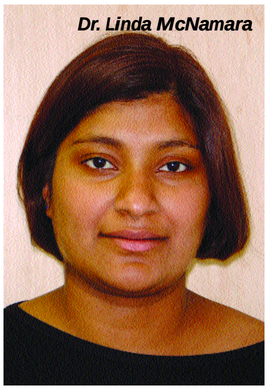
This empowerment is expected to shift some of the burden for seeking appropriate and timely treatment away from physicians and healthcare payers. However, the public's reaction and acceptance of genotyping remains unclear and any unresolved opposition is seen as a major barrier to the progress of genotyping in disease management. Despite the uncertainty, progress is expected in certain areas of genotyping such as assessing 'at-risk' conditions for diseases caused by single mutations. This includes cystic fibrosis and certain types of breast cancer, where it is currently practiced to institute preventive treatment or genetic screening.

The report additionally finds that governments and healthcare insurers are only interested if genotype-based medicine reduces overall healthcare costs. Because of this, pharmaceutical companies need to effectively position their pharmacogenomics-derived products to healthcare payers by emphasizing the advantages of offering tailored healthcare interventions to their customers. Personal-

PRESCRIPTION DRUGS ACCOUNT FOR 10% OF TOTAL HEALTHCARE SPENDING. CMS PREDICTS THAT BY 2010, PRESCRIPTION DRUGS WILL ACCOUNT FOR 14.2% OF TOTAL HEALTHCARE SPENDING.



Source: CMS Health Care Industry Market Update



According to Dr. Linda McNamara, Pharmacogenomics-based screening provides valuable predisposition information that could be used to increase the customer base for a particular therapy.

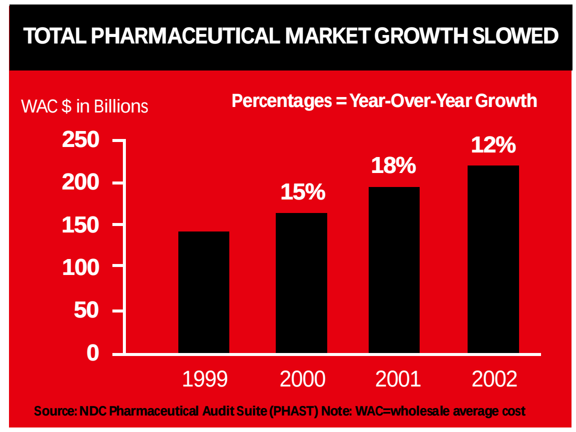
ized medicine enables diseases to be prevented or the severity lessened through early diagnosis and the use of innovative therapies with high efficacy and significantly improved side-effect profiles. However, the true value of genotyping to healthcare payers will not be apparent until its cost-effectiveness is determined through a long-term assessment of health outcomes and health economic studies. This uncertainty is expected to delay returns on investment and place greater pressure on pharmaceutical companies to fund initial population testing.

Patient empowerment is expected to significantly affect healthcare professionals' decision-making processes, the report says. This is expected to place greater pressure on the need to re-educate physicians, which Datamonitor believes is the largest single issue facing pharmaceutical marketers and will have the greatest bearing on the success of sales and marketing strategies.

The study also reveals that the reluctance of the pharmaceutical industry to invest in pharmacogenomics is leading to missed revenue opportunities. Companies may be forced to re-evaluate their research and development planning because of the availability of pharmacogenomics-based diagnostics. The profit opportunity from smaller markets could increase dramatically as clinical development costs and promotional expenses are reduced.

"Pharmacogenomics-based screening provides valuable predisposition information that could be used to increase the customer base for a particular therapy," says Dr. Linda McNamara, healthcare strategy analyst at Datamonitor. "Pharmacia is using this strategy through its pharmacogenomics alliance with deCode Genetics to identify genetic markers that are indicators for patients most likely to progress from an early to a more advanced form of heart disease. This predictive information will be vital to the development of a diagnostic/therapeutic tandem approach for the management of diseases such as heart failure and is intended to open up new market opportunities for its investigational hypertension and heart-failure drug eplerenone (selective aldosterone blocker)."

NDCHealth Presents **PHARMATRENDS 2002** Year-in-Review



NDCHealth Corp.'s PharmaTrends 2002, a comprehensive analysis of pharmaceutical sales and purchasing trends, has found that growth of the total pharmaceutical market slowed in 2002 to 12% from 18% in 2001 and 15% in 2000. In addition, new product sales in 2002 decreased to $156 million versus sales of $1.2 billion.

The analysis also revealed that selective serotonin reuptake inhibitors and serotonin/norepinephrine reuptake inhibitors made up the top therapeutic class in terms of retail sales in 2002. However, the top product in 2002 was Pfizer's cholesterol-lowering Lipitor, with sales of $5.58 billion.

In terms of market segment, retail accounted for 67%, the hospital market 15%, mail order 8%, clinics 7%, and the long-term market 3%.

Meanwhile, the top 10 pharmaceutical companies in the U.S. market accounted for 53.3% of the total market segment.

Alerts To Pharmacists **PREVENTED 3 MILLION POTENTIAL ADVERSE DRUG INTERACTIONS** in One Year

A study of patient safety by AdvancePCS has documented that its information systems help avoid nearly 3 million adverse drug interactions annually by instantly alerting pharmacists to potentially harmful or deadly prescribing situations.

The study results show that AdvancePCS' proprietary, online system, connected to virtually every pharmacy in the United States and serving one in every four Americans, issued safety-related alerts for more than 32 million prescriptions in a year. Of that number, 2.9 million prescriptions, or 9%, were "reversed," meaning the pharmacist dispensed a safer alternative or cancelled the prescription after consulting with the patient and prescribing physician.

"Out-of-chain" alerts — meaning alerts based on potential drug use interactions involving prescriptions filled at different pharmacy chains — accounted for 1.1 million of these reversals, including 23% of all reversals in the drug-drug interaction category, 22% of reversals in the overuse category, and 25% of reversals in the ingredient duplication category. These numbers are significant because they represent therapeutic changes that would not have occurred without AdvancePCS' review of a patient's active prescriptions filled at all provider pharmacies.

"Our point-of-service system plays a crucial, but often overlooked, role in improving pharmaceutical care safety," says Dr. Joseph Aita, AdvancePCS senior VP and chief medical officer. "Not only are adverse drug events the fourth leading cause of death in the United States, they also are estimated to cost as much as $136 billion annually, more than the country's total expense for cardiovascular or diabetic care. This capability saves countless of our plan members from very serious, and even fatal, complications."

AdvancePCS' drug use review system conducts safety checks for all prescriptions dispensed to members of health plans, employers, and other organizations that are clients of the company. The drug use review process starts with a pharmacist entering a prescription into the pharmacy's computer system, which is then relayed to the AdvancePCS adjudication system. The system identifies the patient and verifies the price, eligibility, and payment terms. It also reviews the patient's active prescription history, including every drug the patient has filled at any pharmacy through his or her AdvancePCS membership coverage.

Alerts are sent to the pharmacist when the AdvancePCS system detects any of a number of potential therapeutic conflicts, such as drug-age, drug-allergy, drug-disease, drug-drug, drug-gender, drug-pregnancy, excessive controlled substance, excessive duration/overuse, high dose, ingredient duplication, and therapeutic duplication.

Women's Health and Pain Markets to **EXPERIENCE DOUBLE-DIGIT GROWTH**

The worldwide market for prescription drugs for women's health will nearly double by 2007, according to a study released by Kalorama Information. Manufacturers' revenue for 2002 approached $36 billion, according to the study, and will reach $64 billion in 2007.

The study, Women's Health: Worldwide Prescription Drug Markets, reveals that the market has been growing at nearly 17% during the past five years and predicts that growth will continue to be in the double digits for the foreseeable future. Growth will be supported by the aging of women around the world, particularly in the United States, and an increase in product demand spurred by a still-growing women's health awareness movement.

"The importance and potential in this market can be seen in the dynamism of the competitive landscape," says Steven Heffner, acquisitions editor at Kalorama Information. "Pharmacia's strong No. 2 position in women's health certainly was a factor in Pfizer's decision to move in, and generic companies are aggressively attacking the patent positions of top companies like No. 1 Merck. The opportunity is too large to ignore."

The study covers the products and markets for prescription drugs in all sectors of women's health such as autoimmune diseases, cancer, gynecological infection and sexually transmitted disease, hormone-related indications (including menopause, contraception, and sexual dysfunction), osteoporosis, and urinary bladder disorders.

A separate Kalorama report finds that the U.S. pain management market will surpass $25 billion this year and continue to see double-digit growth for the near future. Increasing rates of cancer and various surgical procedures, along with a patient-driven political movement to address the unmet needs of chronic pain sufferers, are creating great opportunities across the spectrum of pain management.

The study, The U.S. Market for Pain Management Drugs and Devices, found the particularly fast-growing segments in the market to be spinal cord stimulator devices and certain prescription narcotic analgesics, while revenue from over-the-counter analgesics and transcutaneous electrical nerve stimulation devices are slowing somewhat.

"The prescription narcotic segment is in an especially good position to capitalize on several intersecting trends," Mr. Heffner says. "New clinical guidelines are urging doctors to ignore the myth that opioids are excessively dangerous at the same time that patient advocacy groups are bringing more and more patients to the physicians' doorsteps. It's really a marketer's dream scenario."

OTC Treatments Rank as MOST MEMORABLE DTC ADS

Intermedia Advertising Group's Top Ten Most Effective Medicines/Supplements Ads report focuses exclusively on new campaigns between Jan. 1, 2003, and Feb. 20, 2003. The results rank TV ads based upon a viewers' ability to recall the new ads and their associated products/brands. The ranking is derived from an ad's individual recall score and recall index.

According to the survey, TV ads for Stacker-2 weight-loss supplements, Alka-Seltzer heartburn and cold relief products, and Breathe Right nasal strips rank as the most recalled advertisements during the period studied.

The recall score is the percentage of television viewers who can recall within 24 hours the brand of an ad that they have been exposed to during the normal course of viewing television. These scores are then indexed against the mean score for all new ads in the prescription, over-the-counter, and supplements categories during the time period (recall index). A score of 100 equals average.

TOP 10 MOST EFFECTIVE MEDICATIONS & SUPPLEMENTS ADS
JANUARY THROUGH FEBRUARY 2003

Rank	Brand	Ad Description	Recall Recall Index
1	Stacker 2 Lite	Mob boss introduces Trish Stratus, pills in violin case	267
2	Alka-Seltzer Plus	Man turns to block of ice at surprise party, nose and throat tag	230
3	Breathe Right Nasal Strips	Boy on bed, head flattens	197
4	Excedrin QuickTabs	Man complains about traffic and headaches	184
5	Excedrin QuickTabs	Man, fit in pocket better than glass of water	184
6	Tums Ultra	Man in diner asks waitress, compares with Pepcid AC	160
7	NicoDerm CQ	Woman in suit, graph compares NicoDerm CQ vs. Nicotrol	150
8	One-A-Day Weight Smart	Woman recalls when she could eat anything and not gain weight	137
9	Abreva	Woman checks cold sore in window, mirror, spoon	134
10	Pepto-Bismol	Woman by Vegas billboard, talks about family eating out	117

Source: Intermedia Advertising Group Inc.'s Ad Performance Data Series

BIOPHARMACEUTICAL PRODUCT APPROVAL TIMES DROP 21% Since the 1980s

Biopharmaceutical products are taking less time to win FDA approval, but longer to complete required premarket studies, according to a recent analysis released by the Tufts Center for the Study of Drug Development.

According to the Tufts Center, mean approval time for new biopharmaceuticals dropped by 21% — from 24.9 months to 19.7 months — between 1982 and 1989 and 2000 and 2002.

During the same time, the average length of clinical times for new biopharmaceuticals increased by 137% — from 31.2 months to 74 months.

"The net result is that the average combined clinical and approval time for biopharmaceutical products that received FDA approval from 2000 to 2002 was three years longer than it was in the 1980s," says Tufts Center Director Kenneth I. Kaitin.

On average, combined clinical and approval time for recently approved new biopharmaceuticals took 7.8 years, compared with 4.7 years in the 1980s.

Lengthening development times for biopharmaceutical products are attributed in part to the fact that development programs have become more complicated and challenging, Mr. Kaitin says.

Two decades ago, the biotechnology industry focused on the development of products thought most likely to succeed. According to Janice M. Reichert, lead investigator on the study, more complex and innovative substances are being developed and tested today.

"The majority of biopharmaceuticals approved during the 1980s were biological proteins with well-understood functions, such as Factor VIII, or recombinant versions, such as insulin and human growth hormone," she says.

Longer development times have translated into more expensive drug development programs. According to the Tufts Center, the average drug costs $802 million to develop and bring to market.

Key findings from the Tufts Center analysis:

• Recombinant proteins comprised 70% of new biopharmaceuticals approved from 2000 to 2002.

• Mean clinical phase time for recombinant DNA (rDNA) products was 19% shorter than for monoclonal antibodies (mAbs), but 13% longer than for biologics.

• Mean approval phase time for rDNA products was 72% longer than for mAbs, but 75% of mAbs were priority reviewed, whereas only 12% of rDNA products had a priority rating.

Integrated and Customized Solutions to DRIVE PROTEOMICS SAMPLE PREPARATIONS

Integrated, customized, and validated research solutions for proteomics analyses and drug discoveries will fuel growth in the sample preparations market, according to research by Frost & Sullivan. Increased number of runs and samples prepared are spurring demand for reliable and specific separation tools.

Analysis from Frost & Sullivan's World Proteomics Sample Preparation Market report reveals that this market had revenue of $57.8 million in 2000 and is poised to expand to $367.7 million by 2009.

To build brand equity and a loyal customer base in this market, analysts say companies must develop reliable products and provide researchers with the tools and technical support needed for their research.

The primary challenge faced by researchers is the divergent nature of proteomics. This hampers the development of a standard sample preparation solution. As samples have to be specific to the area of research, different characteristics are important for samples meant for distinct areas of research.

Tool providers that address this challenge through custom-made solutions for proteomics researchers can reap great profits. Solutions that are geared toward specific research needs will enable better focus on experimental design and derive meaningful information from data.

Consumers Seeking Online Information DOUBLES

ePharma Consumer v2.0, a study of 3,000 online consumers seeking pharmaceutical information online, has found that there were 26.3 million online consumers seeking pharmaceutical information in the last quarter of 2002. The Manhattan Research study found that the number has more than doubled from 11 million 18 months earlier.

TV continues to be responsible for the vast majority of pharmaceutical DTC product awareness among ePharma consumers; however, online awareness/advertising rivaled print among the ePharma consumer population in this latest research. The top five conditions researched online were allergies, depression, obesity/weight loss, diabetes, and acid reflux. The next five were high cholesterol, pain management, anxiety/social phobia, hypertension, and migraine headache.

Follow up

ADVANCEPCS, Irving, Texas, is one of the nation's largest independent providers of health improvement services, touching the lives of more than 75 million health plan members and managing about $28 billion in annual prescription drug spending. For more information, visit advancepcs.com.

BIOINFORMATICS LLC, Arlington, Va., is a market research firm that supports marketing, sales, and R&D executives in the life-science, medical-device, and pharmaceutical industries through published research reports, custom research, and consulting. For more information, visit gene2drug.com.

THE CENTERS FOR MEDICARE AND MEDICAID SERVICES, Baltimore, is a federal agency within the U.S. Department of Health and Human Services, which runs the Medicare and Medicaid programs — two national healthcare programs that benefit about 75 million Americans. For more information, visit cms.hhs.gov.

DATAMONITOR PLC., London, is a premium business information company specializing in industry analysis for six industry sectors: automotive, consumer markets, energy, financial services, healthcare, and technology. For more information, visit datamonitor.com.

DECISION RESOURCES INC., Waltham, Mass., is a leader in research publications, advisory services, and consulting. The company provides strategic information services and assesses international pharmaceutical and healthcare industry trends. For more information, visit decision-resources.com.

FROST & SULLIVAN, San Antonio, is a global leader in strategic growth consulting and also offers custom growth consulting to a variety of national and international companies. For more information, visit frost.com.

HARRIS INTERACTIVE, Rochester, N.Y., is a worldwide market research and consulting firm that combines the power of unique methodologies and technology with international expertise in predictive, custom, and strategic research. For more information, visit harrisinteractive.com.

HARVARD MEDICAL SCHOOL, Boston, is one of the world's preeminent institutions in medical education and research. For more information, visit hms.harvard.edu.

HEALTH PRODUCTS RESEARCH INC., Whitehouse, N.J., a division of Ventiv Health Inc., provides the pharmaceutical industry with sophisticated consulting services, including market research, promotion analyses, market segmentation, strategic planning, salesforce deployment, and call planning. For more information, visit hprmrd.com.

HEALTH STRATEGIES GROUP INC., Palo Alto, Calif., is a research and consulting organization serving the strategic and information needs of the pharmaceutical industry. For more information, visit healthstrategies.com.

INTERMEDIA ADVERTISING GROUP, New York, is the ad ratings service that monitors the effectiveness of television ads on a daily basis. IAG employs a sophisticated methodology and reporting system that furnishes key ad performance data on every commercial running in prime-time network television. For more information, visit iagr.net.

KALORAMA INFORMATION, New York, an imprint of MarketResearch.com, supplies the latest in independent market research for the life sciences. For more information, visit kaloramainformation.com.

MANHATTAN RESEARCH LLC, New York, is a marketing information and services firm that helps healthcare and life-science organizations adapt, prosper, and exploit opportunities in the networked economy. For more information, visit manhattanresearch.com.

MEDTECH INSIGHT, Newport Beach, Calif., provides intelligence and insight into the medical technology developments and the small and large companies shaping a wide range of surgical procedures. For more information, visit medtechinsight.com.

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