

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 concentrated 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 participates 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

Test Groups Included In The Study

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

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

Contents

Market Size

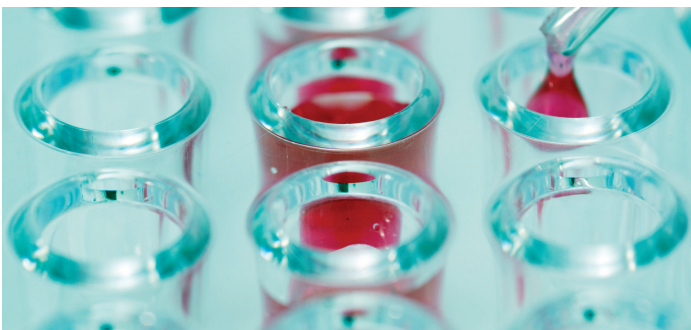
Account Potential:	Number of accounts performing tests within each discipline
In-House Menu:	Number of accounts performing each analyte in-house
Demand:	Number of results reported per year by analyte
Growth Rates:	Year to year comparison of result volume (subsequent cycle)

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 • HCV Ab • HCV Ag • HCV Ag/Ab Combo • HBcAb IgG • HBcAb IgM • HBcAb Total • HBsAb • HBcIgM • HAV Ab IgG • HAV Ab IgM • HAV Ab Total • HBe Ab • HBeAg • HBV Qualitative (NAT) • HBV Quantitative (NAT) • HCV Qualitative (NAT) • HCV Quantitative (NAT)
Retrovirus	HIV I Ab • HIV I Ag (EIA) • HIV II Ab • HIV I/II Ab (Combo) • HIV Ag/Ab Combo • HTLV I/II Combo • HIV I Ab Rapid • HIV I Qualitative (NAT) • HIV I Quantitative (NAT) • HIV-1 Genotype
Sexually Transmitted Diseases	Chlamydia • Gonorrhea • HSV 1/2 • HPV • Syphilis • Trichomoniasis
Other Tests	Chagas (T. Cruzi) • C. Difficile • Giardia Antigen • H. Pylori • Norovirus • CMV Ab IgG • CMV Ab IgM • CMV Total • Ebola Zaire Virus • EBV Ab IgG • EBV Ab IgM • Group A Strep • Group B Strep • Influenza A,B • Legionella • Lyme • Malaria • Measles Ab IgG • Measles Ab IgM • MRSA • Mumps Ab IgG • Mumps Ab IgM • Rotavirus • RSV • Rubella Ab IgG • Rubella Ab IgM • Toxoplasmosis Ab IgG • Toxoplasmosis Ab IgM • Varicella Zoster Ab IgG • Varicella Zoster Ab IgM • West Nile Virus • Zika IgM

Approximate Sample Composition

Market Segment	Number In Universe	Number In Sample	Sample As Percent Of Universe
Hospitals	5,055	1,202	23.8
Commercial Laboratories	442	130	29.4
Blood Donor Centers	37	19	51.4
Public Health Laboratories	200	44	22.0
Total	5,734	1,395	24.3

2018 Pricing Report (26th Cycle)

Hepatitis Section	\$18,570
Retrovirus Section	\$18,570
Sexually Transmitted Diseases Section	\$15,430
Other Tests Section	\$35,155
Total Report (All Sections Included)	\$85,000

Data for the 2018 Infectious Disease MARKET MONITOR™ is collected in December, 2018 and reflects the market as of the fourth quarter of 2018.

