

Market Scope, LLC

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Market Scope

Ophthalmic Market Research, Analysis, and Reporting

Improve Your Resolution With The Latest Market Information

Don't strain to connect the dots with pieces of information. Our products and services can be building blocks to understanding the dynamics of the global ophthalmic market. Our information will allow you to gauge competitors, identify new market opportunities, monitor market shares, project product demand, benchmark performances and set accurate targets for annual plans.

Market Scope brings independent perspective and context to the latest industry information by using surveys of ophthalmologists, a proprietary database and extensive industry contacts. Many of our products are available in electronic formats or through on-line subscriptions to improve the benefit and accessibility of our products.

We Cover:

- Patient Trends
- Manufacturers
- Patents
- Ophthalmologists
- Regulatory Issues
- New Technologies
- Procedure Volumes
- Laser and Surgery Centers
- Market Shares and Pricing Trends

Products and Services

Monthly Newsletter:

Ophthalmic Market Perspectives

Surveys:

Annual Refractive Surgeon Survey
Annual Cataract Surgeon Survey

Reports:

The Comprehensive Report on the Refractive Market
The Comprehensive Report on the Intraocular Lens Market
The Comprehensive Report on the Cataract Surgical Equipment Market
The Ophthalmic Single-Use Device Market Report
The Retinal Surgical Device Report
The Retinal Pharmaceuticals Market Report
The Surgical and Office-Based Diagnostic Equipment Market Report
The Worldwide Glaucoma and Retinal Instruments Market Report
Report on the Global Dry Eye Market
The Comprehensive Report on the Presbyopia Market
Quarterly Update on the US Refractive Market
Quarterly Update on the US Cataract Market

Geographic Analysis:

US Ophthalmic Atlas
Target Market Assessments
Patient Survey Analysis
Sales Territory Design and Analysis

Consulting and Custom Research:

Market Opportunity Analysis
Competitive Analysis
Surgeon Interviews
Surgeon Focus Groups
Custom Surveys

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Ophthalmic Market Perspectives Newsletter

Don't strain to connect the dots with pieces of information. Our monthly newsletter will sharpen your company's perception of the eye care industry.

Ophthalmic Market Perspectives provides you with the most current business information on the ophthalmic industry. Our monthly newsletter includes news, opinions, projections, original research, color charts and graphs designed to provide perspective on products, events and market trends.

Gain access to critical information on the **refractive**,

cataract and **retinal** markets including:

- Procedure Volumes
- Average Procedure Pricing
- Surgeon Opinions from Quarterly Surveys
- FDA Regulatory Approvals
- Clinical Trial Status
- New Technological Advances
- Coverage of Major Ophthalmic Meetings

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Ophthalmic Market Perspectives

Q3-2004 Cataract Procedures Up 3.0 Percent

The number of U.S. cataract procedures climbed 3.0 percent in Q3-2004 when compared with the same quarter last year and increased by 2.0 percent when compared to Q2-2004. Approximately 697,500 U.S. cataract surgical procedures were performed during Q3-2004, as compared to 686,900 during Q2-2004 and 677,200 during Q3-2003.

Historically, more cataract surgery is performed in the third quarter of the year and Q3-2004 followed course. Better weather and preparations for the holiday season contribute to the greater surgical demand. Demand peaks in September as many seniors and cataract surgeons return from summer vacations and the growth spurt extends to early November when colder weather and the holiday season interfere with schedules.

Q3-2004 U.S. cataract procedure volumes were in line with expectations despite some minor distractions resulting from new technologies and changing market

Benefiting from stronger economic conditions and technology improvements, U.S. refractive surgical procedures grew by 15.5 percent when compared to the same quarter last year. (page 1)

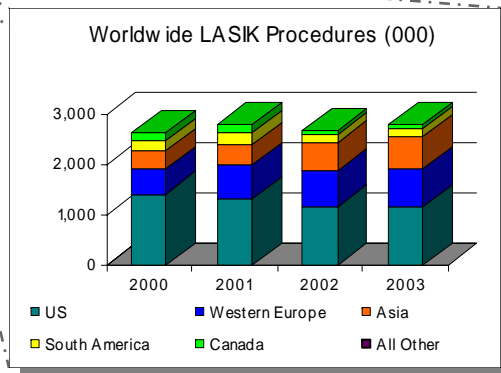
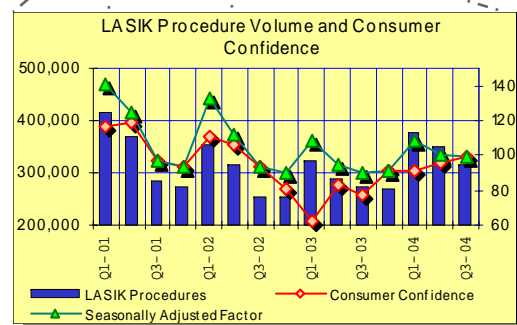
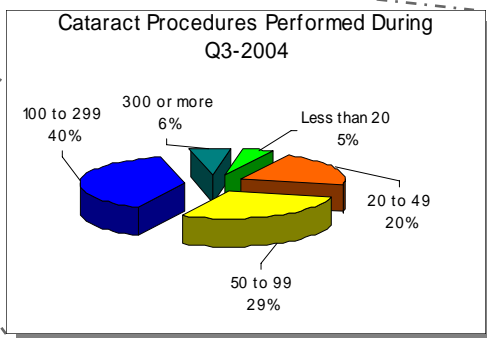
The American Academy of Ophthalmology held its annual meeting in late October. The meeting featured the latest clinical studies for treatment of AMD, new upgrades to excimer lasers and phaco machines, plus the latest on development efforts for a new generation of advanced IOLs. (page 1)

Consolidation of the corporate laser center business is moving forward at a breakneck pace with the acquisition of Boots laser centers by David Moutdale's Optical Express. (page 8)

An Arizona judge reinstated the largest LASIK malpractice award in October. The \$4 million judgment was for an airline pilot with large pupils and night vision problems. (page 9)

Occulogix in Final Stages of IPO Process

Occulogix, Inc. is in the final stages of its initial public offering in which it plans to raise \$56 million to \$68 million for completion of U.S. clinical studies for its proprietary treatment for the dry form of age-related macular degeneration (AMD) and for related business development costs. In addition, shareholders plan to sell 2.8 million shares bringing the total value of the IPO from \$84.0 million to \$116 million. The Company will be formed from a combination of assets that belong to several legal entities including a 65.8 percent interest owned by TLC Vision, Inc. Elias Vamvakas, formerly Chairman and



Ophthalmic Market Perspectives is produced and distributed monthly in full color. A one-year paper and electronic subscription to the newsletter is \$500 plus \$150 for each additional user within your company.

To order **Market Scope** products, complete the following form and fax to (314)835-0606 or mail to Market Scope, 13610 Barrett Office Drive, Suite 211, Manchester, MO 63021.

Please send me the following products:

Monthly Newsletter

- One Year Subscription to **Ophthalmic Market Perspectives** \$500 (Outside the US \$525)

Refractive Reports

- **The Comprehensive Report on the Refractive Market** \$3,450
- **Quarterly Refractive Updates (Includes four Updates)** \$3,200
- **Refractive Bundle: Includes Comprehensive Refractive Report and four Refractive Quarterly Updates**
Purchase both for a discount: \$5,950
- **Comprehensive Report on the Presbyopia Market** \$ 2,500

Cataract Reports

- **Report on the Worldwide Intraocular Lens Market** \$3,450
- **Report on the Cataract Surgical Equipment Market** \$2,250
- **The Single Use Cataract Products Report** \$2,250
- **Cataract Bundle: Combination of IOL, Cataract Surgical Equipment, Ophthalmic Single-Use Devices**
Purchase all three reports for one price: \$6,100
- **Quarterly Cataract Updates (Includes four Updates)** \$3,350

Retinal Reports

- **Comprehensive Report on the Retinal Surgical Device Market** \$1,800
- **Comprehensive Report on Retinal Pharmaceutical Products** \$2,950
- **Retinal Bundle: Combination of Retinal Surgical Device Report and Retinal Pharmaceutical Products Report**
Purchase both for a discount: \$4,200

Other Reports

- **Report on the Global Dry Eye Market** \$1,900
- **Report on Surgical and Office-Based Diagnostic Equipment Market** \$2,100
- **Glaucoma and Retinal Diagnostic Equipment Market Report** \$2,500
- **Diagnostic Bundle: Combination of Surgical and Office-Based Diagnostic Equipment Report and Glaucoma and Retinal Diagnostic Equipment Report, Purchase both for a discount: \$4,000**

Surveys

- **Annual Refractive Surgeon Survey** \$4,700
- **Annual Cataract Surgeon Survey** \$4,700

Geographic Analysis

- **US Ophthalmic Atlas** \$4,000
- **Sales Territory Design and Analysis**
- **Target Market Assessment (we will contact you for more information)**

Consulting and Custom Research

- Please Contact Me to Discuss Custom Research and Consulting

Name: _____ Company: _____

Address: _____

City _____ State _____ Country _____ Zip _____ Phone: _____

Fax: _____ E-mail: _____

Billing Information

○ Visa ○ MasterCard ○ American Express

Name on Credit Card: _____

Card Number _____ Exp: _____

○ Check Enclosed ○ Company Purchase Order Attached

David Harmon

Dave Harmon has 20 plus years' experience in the ophthalmic industry and has been writing and publishing newsletters and reports on the refractive industry since 1996. One report, The Comprehensive Report on the Refractive Market, is now in its tenth edition with more than 200 copies sold. Through his extensive industry experience and his contacts in the business of refractive surgery, Harmon has become a leading expert in all business and technical aspects of the refractive industry.



In addition to his research and writing efforts on the refractive market, Harmon also serves as founder and president of Market Scope, LLC. Market Scope publishes an ophthalmic industry newsletter and reports on various markets within the ophthalmic industry including cataract surgery, retina, and dry eye. The Company also performs specialized research to assist in product development, marketing plans, etc.

Harmon's ophthalmology experience began in 1984 at Alcon Inc., where he served in several capacities including three years as Manager of Business Planning and Acquisitions for the Surgical Division and five years as General Manager of the Alcon Systems Division. Harmon also served as Vice President of EyeShaper Laser Centers, a company formed to organize a chain of laser centers. His educational background includes a Bachelor of Science in Business Administration with an accounting major from Texas Tech University and a Master of Science in Finance from the University of Texas at Dallas.

William Freeman

Bill Freeman has more than 30 years' experience developing, manufacturing and marketing cataract surgery products. He has held key executive positions at four firms that produce ophthalmic surgical devices.

Freeman's career in ophthalmology began in the 1970s. As president of Cavitron Surgical Systems, he worked with Dr. Charles Kelman in developing and marketing the world's first phacoemulsifier system. While highly controversial in the 1970s, phacoemulsification gradually became the preferred cataract-removal technique in the early 1980s. For many years, Cavitron was the global market leader for cataract instrumentation.



Freeman also served as a senior executive for CooperVision after its acquisition of Cavitron and later for Alcon after it acquired CooperVision. While at Alcon, Freeman served as general manager of the Irvine Technology Center, where a number of the Company's cataract devices were designed and manufactured, including the Legacy™ 20,000 phacoemulsifier and a broad line of disposable items.

Freeman remained with Alcon until 1995. He then joined Mentor Ophthalmics as president of the ophthalmology division, where he was responsible for the acquisition of ORC IOLs and the subsequent launch of the MemoryLens™ foldable IOL.

After Mentor's ophthalmology division was sold in 1999, Freeman remained in Santa Barbara, California, where Mentor was located. He has since devoted his time to industry analysis and report writing. He now serves as executive vice president in charge of cataract and retinal research for Market Scope and as senior editor of Market Scope's Ophthalmic Market Perspectives newsletter.

Refractive Surgeon Survey

Our **Refractive Surgeon Survey** is designed to increase understanding of industry dynamics and gain important insight into leading trends. We provide accurate and valuable information by profiling surgeons' opinions and use of products, techniques and procedures.

Report Highlights

- Procedure market share by laser and microkeratome
- Wavefront-driven LASIK procedures; including surgeons offering procedure, procedure pricing and equipment preferences
- Surgeon recommendations for treatment techniques by refractive error
- Capital equipment purchasing plans for the next year

The **Refractive Surgeon Survey** includes a representative sample based on region, surgical volume, laser used, and location of surgery. The survey was developed in conjunction with industry manufacturers and providers to provide the most accurate data. Our 2005 refractive survey report is 52 pages and includes 60 questions and 256 data elements per response. The report includes more than 140 color graphs and tables.

- Practice Description
- Surgery Revenues
- Revenue Change in Future
- Company Ranking by Business Practices- Products
- Professional Organizations
- Location of Surgery
- Procedure Volume
- Procedure Market Share
- Wavefront-Driven Diagnostics
- Wavefront-Guided LASIK
- Microkeratome Used
- Microkeratome Blades
- Vision Disorders
- Treatment Methods
- Enhancement Rates
- Refractive Procedures
- New Diagnostic Equipment
- Laser Replacement
- Microkeratome Used
- Microkeratome Purchase Plans
- Vision Disorders
- Preferred Treatment Method
- Conventional LASIK Recommendations
- Best Hyperopia Technology
- Presbyopic Correction
- Procedure Packs
- Marketing Strategy
- Optometric Staffing & Referral Programs
- Co-Management Programs
- Patient Referrals, Financing
- Payment Methods
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- Interest-Free Financing
- Competitive Factors
- Average Price Per Eye
- Factors Affecting Price
- Tiered Pricing
- Refractive Practice Issues
- Phakic IOL Designs
- Anti-Infectives
- Anti-Inflammatories
- Dry Eye Medications & Treatments

Cataract Surgeon Survey

Our **Cataract Surgeon Survey** is designed to increase understanding of industry dynamics and gain important insights into leading trends. We provide accurate and valuable information by profiling surgeons' opinions and use of products, techniques and procedures.

Report Highlights

- Procedure market share by IOL, phaco and viscoelastic
- Market share by surgeon, hospital, and corporate-owned surgical facilities
- Products purchased under cross-merchandising plans
- Surgical techniques and new technologies
- New IOL technologies

The **Cataract Surgeon Survey** includes a representative sample based on region, surgical volume, and location of surgery. The survey was developed in conjunction with industry manufacturers and providers. Our report is 53 pages and includes 55 questions and 252 data elements per response as well as over 130 color graphs and tables.

- Practice Description
- Revenue Sources
- Revenue Change in Future
- Patient Referrals
- Medicare Coverage
- Professional Organization
- Company Ranking by Business Practices, Products and Services
- Location of Surgery
- Procedure Volume
- Incision Location
- Technique for Cataract Extraction
- Treating Astigmatism
- IOL Market Share
- IOL Share, Hospitals and Hospital ASCs
- IOL Share, Surgeon-Owned ASCs
- Cost of IOL
- Cross-Merchandised IOL
- IOL Features & Importance Rating
- Phakic IOLs
- Multifocal IOLs
- Accommodating IOLs
- Blue-Light Filtering IOLs
- Future IOL Trends
- Refractive Lens Exchange
- Phaco Machine Market Share
- Phaco Machine and Surgery Location
- Phaco Features
- Phaco Problems
- New Phaco Machine Plans
- Phaco Pack Costs
- Phaco Cross-Merchandising
- Bimanual Phaco
- Viscoelastic Model
- Location of Surgery
- Viscoelastic Used
- Viscoelastic Features and Importance Rating
- Viscoelastic Cost
- Procedure Pack Usage
- Disposable Device Use
- Anti-Infective Use
- Anti-Inflammatory Use

The **Refractive** and **Cataract Surgeon Survey Reports** consist of a spiral bound, color report as well as a CD-Rom that contains both the report in .PDF format and a PowerPoint presentation. The survey report price is \$4,700 each. Additional copies are available for use within your company for \$250 each.

The Comprehensive Report on the Refractive Market

Author: David Harmon
October 2005

Now in its tenth edition, our report on the refractive market is the leading industry source for accurate and relevant information on all aspects of the refractive industry, including procedure pricing, market shares and projections.

The data included in our reports is based on quarterly surveys of refractive surgeons, annual surveys of patients, interviews with company executives, and analysis of financial data.

Our Report is Organized Into Key Areas and Includes:

- A summary of primary vision care and options for vision correction.
- An overview of patient demographic data collected from surveys of LASIK patients with information on age, income and education levels, etc.
- Data on refractive surgeons including the number of surgeons, type of practice, average procedure volumes, where surgery is performed, surgical techniques used and economics.
- Analysis of the laser center business including business models, market segments, economics of laser center operation, international laser centers and forecasts for procedures and pricing over the next five years.
- A review of laser manufacturers, laser features, regulatory status, market shares, installed base and forecasts for laser demand over the next five years.
- Overview of alternative technologies including phakic IOLs, refractive IOLs, conductive keratoplasty, etc.
- Descriptions and analysis of associated technologies including wavefront diagnostic instruments, punctum plugs, dry eye medications and disposable products used in refractive technology.
- An analysis of the microkeratome market including a description of products available, installed base of equipment, market share for disposables and projected market demand for the next five years.

The **Comprehensive Report on the Refractive Market** was published in October 2005. Reports are printed in color and spiral bound for ease of reading. The price of the report is \$3,250 and additional copies are available for use within your company for \$250 each.

To keep the report current, we provide quarterly updates of key tables such as procedure volumes, market share, LASIK prices, etc.

Quarterly Updates are available approximately 45 days after the end of each calendar quarter and continue for a year, or four updates. The updates sell for \$3,200 for all four quarterly updates, or they are available separately for \$850 each.

Custom Consulting and Research

Competitive Analysis:

- Analyzed disposable cataract surgical knife market for an international instrument company. The project included identification of competitors, market share, pricing and cost structure, evaluation of distribution techniques and potential partners.
- Analyzed the microkeratome market including demand for instruments, disposable blades and service by country for a start-up microkeratome manufacturer.
- Identified and ranked high potential LASIK markets for opening of new laser centers for an expanding laser center company.
- Surveyed and reported on market share of laser centers for 50 large metro areas for a leading laser center company.
- Assisted a large international pharmaceutical company with plans for introduction of products into the US market.
- Evaluated the relationship between cataract devices and pharmaceuticals for a leading ophthalmic company.

Pricing Surveys:

- Surveyed over 450 laser centers in regard to LASIK pricing and analyzed the results to support marketing claims for a leading laser manufacturer.
- Surveyed 100 laser centers each quarter over a two-year period to identify pricing trends on a geographic level for leading laser manufacturers.

Surgeon Interviews and Focus Groups:

- Conducted interviews with surgeons in order to measure perceptions of a new marketing plan for ophthalmic devices. This project included design of the interview and a summary report.
- Conducted interviews with ophthalmologists to identify the key design points for a new diagnostic instrument.
- Organized and conducted several focus group meetings to review surgeons' perceptions of products and services for a laser manufacturer.
- Surveyed 120 pediatric ophthalmologists to identify standard treatment plans for amblyopia and to measure demand for a new treatment technique.

To get more information on consulting and research projects that **Market Scope** has completed or to discuss custom consulting and research for your company please contact us at (314) 835-0600 or email at daveharmon@market-scope.com

Custom Target Market Assessments

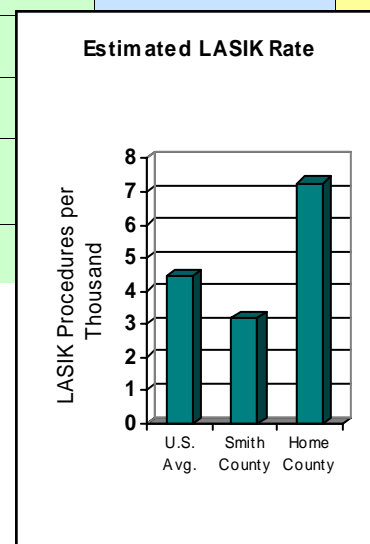
How Target Market Assessments Can Help You:

Effective marketing campaigns begin with a clear understanding of your potential market and the competitive landscape in your market area. Market potential is a function of the population of your market area and demographic characteristics such as age, income levels, education levels, and buying patterns. Retailers, service providers, and manufacturers have used market cluster technology for decades to target customers and Market Scope has brought this analysis tool to the refractive surgery market. Our Target Market Assessment also includes a competitive analysis and comparisons to national averages.



- Target Market Assessments:**
- Estimates of Annual Market Procedures and Penetration Levels
 - Demographic Breakdown by Age and Income Level
 - Market Cluster Breakdown
 - Description of High Potential Market Clusters for Your Area
 - Lists of Refractive Surgeons and Laser Centers in Your Area
 - Area Map with Population Density and Laser Centers Identified

Quick Facts	Smith County	Home County	US Average
Population	454,250	1,312,500	295,325,000
Median Household Income	\$45,950	\$62,300	\$46,365
Laser Centers	2	5	1,233
Refractive Surgeons			3,900
Total Population per Laser Center			237,969
Estimated Refractive Procedures-2005 Market Cluster Analysis			1,366,000
Estimated Cumulative Market Penetration			1.88%



Please contact us to discuss a Target Market Assessment for your market at (314) 835-0500 or at info@market-scope.com. Prices range from \$500 to \$1,500 depending on the complexity and breakdown of the market area.

PRIMARY EYE CARE
 US Primary Eye Care
 International Primary Eye Care
 Refractive Disorders

REFRACTIVE SURGERY TECHNOLOGIES
 History of Refractive Surgery
 Radial Keratotomy
 Photorefractive Keratectomy
 LASIK
 LASEK
 Wavefront-Guided LASIK

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COMPANIES
 20/10 Perfect Vision
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 Advanced Medical Optics, Inc.
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 Allergan, Inc.
 Anamed, Inc.

Bausch & Lomb
 Becton Dickinson & Co. /BD Ophthalmic Systems
 Carl Zeiss Meditec AG
 CustomVis, Inc.
 Eyeonics, Inc.
 IntraLase Corporation
 Katana, Inc.
 Laser Eye Center
 LASIK Vision Institute
 LaserSight Technologies, Inc.
 Moria, Inc.
 Nidek, Inc.
 Paradigm Medical Industries, Inc.
 Q-Vis, Limited
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 2005 Microkeratome Market Share
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The 2005 Worldwide IOL Market Report

Author: William Freeman
August 2005

Now in its fifth edition, our report on the IOL market is a leading industry source for accurate and relevant information regarding all aspects of the IOL market, including market share, average pricing, and market projections.

The data included in our reports is based on quarterly surveys of ophthalmic surgeons, interviews with company executives and analysis of financial data.

Our Report is Organized into Key Areas and Includes:

- An overview of incidence and causes of cataracts as well as the treatment methods of cataracts worldwide.
- An analysis of surgeons, ambulatory surgery centers, hospitals and other providers of cataract surgery with a description of decision processes and buying patterns.
- A description of intraocular lenses in use today with a detailed analysis of market share by units and dollars, plus projections for the next five years.
- An analysis of phakic IOLs with a description of designs, regulatory status, clinical results, and projected market demand for the next five years.
- An overview of lens designs for the treatment of presbyopia including multifocal IOLs, accommodating IOLs, and other implantable devices.
- Descriptions of technologies and development programs for other novel implantable devices.

The report also profiles 49 companies involved in the development and manufacturing of IOLs. A complete table of contents and list of the companies profiled in the report is available on the following page.

The **2005 Worldwide IOL Market Report** was published in August of 2005 and is in its fifth edition. Reports are printed in color and are spiral bound for ease of reading. The price of the report is \$3,450 and additional copies are available for use within your company for \$250 each. We also offer a Cataract Bundle including the **Worldwide IOL Market Report**, the **Cataract Surgical Device Report** and the **Ophthalmic Single-Use Device Report** for a discounted price of \$6,100.

To keep the report current, we provide quarterly updates of key tables such as procedure volumes, market share, prices, etc. **Quarterly Updates** are available approximately 45 days after the end of each calendar quarter and continue for a year, or four updates. The updates sell for \$3,350 for all four quarterly updates, or they are available separately for \$850 each.

The United States Ophthalmic Atlas

The **US Ophthalmic Atlas** is a geographic organization of the US ophthalmic surgeons and laser centers. It is designed to keep you up to date with important market information.

Metropolitan Areas Included in the Atlas:

- Atlanta
- Austin-San Antonio
- Boston Area
- Buffalo
- Charlotte-Raleigh-Durham-Greensboro
- Chicago
- Cincinnati-Columbus-Dayton
- Cleveland-Akron
- Dallas-Ft. Worth
- Denver-Boulder
- Detroit
- Grand Rapids
- Hartford
- Houston-Galveston
- Indianapolis-Bloomington-Muncie
- Jacksonville
- Kansas City
- Las Vegas
- Los Angeles-Orange County
- Louisville
- Memphis
- Miami-Ft. Lauderdale
- Middlesex
- Milwaukee
- Minneapolis-St. Paul
- Monmouth
- Nashville
- New Haven
- New York-Nassau-Suffolk
- Newark-Bergen
- Norfolk-Richmond
- Oklahoma City
- Orlando
- Philadelphia
- Phoenix-Tucson
- Pittsburgh
- Portland
- Riverside
- Rochester
- Sacramento
- Salt Lake City-Ogden-Provo
- San Diego
- San Francisco-San Jose-Oakland
- Seattle-Tacoma
- St. Louis
- Tampa-St. Petersburg
- Washington-Baltimore
- West Palm Beach

Over 45 of the largest metropolitan markets are presented in color maps with all laser centers and surgeons identified and contain analysis of LASIK patient potential, laser market share, average income levels, population density and much more.

Reports are run from *Market Scope's* databases of US laser centers and ophthalmic surgeons. Our databases are constantly being updated with the latest, most accurate information

Our **United States Ophthalmic Atlas** consists of two color reports spiral bound for ease of reading for the price of \$4,000. The atlas includes a listing of all laser centers and surgeons organized by market area and alphabetically with detailed addresses, web sites, phone and fax numbers.

Quarterly Refractive Updates

Our Quarterly Updates on the US Refractive Market are designed to keep you up to date on important market information throughout the year with information on:

- Procedure volumes by market segment
- LASIK prices and pricing trends
- Procedure market share by laser, microkeratome and price.

Our **Quarterly Refractive Updates** address these and other important issues with data from surveys of hundreds of refractive surgeons conducted each quarter. Comparisons with previous surveys for trend analysis are included. All information is presented in color charts and tables with concise narratives explaining each trend.

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Quarterly Refractive Updates are published approximately 45 days after the end of each calendar quarter. Each update can be purchased separately for \$850, or an annual subscription is available for \$3,200.

Quarterly Cataract Updates

Our Quarterly Updates on the US Cataract Market are designed to improve your decision-making process with the most accurate assessment of what is happening in the cataract surgical marketplace with information on:

- Procedure volumes by market segment
- IOL, phaco, and viscoelastic market share
- Cataract procedures by surgical location.

Our **Quarterly Cataract Updates** address these and other important issues with data from hundreds of surveys from cataract surgeons conducted each quarter. Comparisons with previous surveys for trend analysis are included. All information is presented in color charts and tables with concise narratives explaining each trend.

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Quarterly Cataract Updates are published approximately 45 days after the end of each calendar quarter. Each update can be purchased separately for \$850, or an annual subscription is available for \$3,350.

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Alcon AcrySof Natural "Blue Blocker"
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Proteus
Acri.Tec Postoperative Adjustable IOL

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Santen/AVS
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Alcon ReStor
AMO Array Multifocal
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AMO Tecnis ZM001

Carl Zeiss/IOL Tech MF4 Multifocal
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Alcon, Inc.
Advanced Medical Optics, Inc.
AmSurg Corp.
Appasamy Associates
ARC Laser Corporation
Bausch & Lomb
BD Ophthalmic
Carl Ziess Meditec AG
Corneal Labs
Dutch Ophthalmic Research (DORC)
Geuder GmbH
HCA— The Healthcare Company
HealthSouth, Inc.
IOLTech
Katena Products, Inc.
Kirwan Surgical Products, Inc.
Ellex Laser Systems
Lumenis
Mastel Precision
MicroSurgical Technologies
Nidek Co., Ltd.
NovaMed
Oertli Instruments, AG
Ophthalmed, Inc.
Optikon Oftalmologia S.P.A.
Paradigm Medical
Rhein Medical, Inc.
Staar Surgical
Surgical Design Corporation
Surgin, Inc.
TLC Vision
Zevex International

The Cataract Surgical Equipment Market Report

Author: William Freeman
September 2005

Our report on the cataract surgical equipment market is a leading industry source for accurate and relevant information on all aspects of the cataract surgical equipment market, including phaco machine market share, average pricing, and market projections.

The data included in our reports is based on quarterly surveys of cataract surgeons, interviews with company executives and analysis of financial data.

Our Report is Organized into Key Areas and Includes:

- An overview of incidence and causes of cataracts as well as the treatment methods of cataracts worldwide.
- A description of surgeons, ambulatory surgery centers, hospitals and other providers of cataract surgery with a description of decision processes and buying patterns.
- An analysis of cataract surgical equipment in use today with a detailed analysis of market share by units and dollars, plus projections for the next five years.
- A comparison of the new phaco machines introduced in 2005 and new enhancements in the development process.
- An analysis of the phaco machine-pack business including details on market share, average pricing, and projection for the next five years.
- A description of the phaco handpiece market along with an analysis of market share, average pricing, and projections for the next five years.
- Descriptions of new technologies on the horizon with details on development programs and regulatory status.

The report also profiles 45 companies involved in the development and manufacturing of cataract equipment. A complete table of contents and list of companies profiled can be found on the following page.

The **2005 Cataract Surgical Equipment Market Report** was published in September of 2005. Reports are printed in color and are spiral bound for ease of reading. The price of the report is \$2,250 and additional copies are available for use within your company for \$250 each. We also offer the Cataract Bundle including the **Cataract Surgical Equipment Market Report**, the **IOL Market Report** and the **Ophthalmic Single-Use Device Report** for a discounted price of \$6,100.

To keep the report current, we provide quarterly updates of key tables such as procedure volumes, market share, prices, etc. **Quarterly Updates** are available approximately 45 days after the end of each calendar quarter and continue for a year, or four updates. The updates sell for \$3,350 for all four quarterly updates, or they are available separately for \$850 each.

Comprehensive Report on the Presbyopia Market

Author: David Harmon
October 2005

Our Comprehensive Report on the Presbyopia Market is a leading industry source for accurate and relevant information on all aspects of the market, including market shares, average prices and market projections .

The data included in our reports is based on quarterly surveys of ophthalmic surgeons, interviews with company executives and analysis of financial data.

Our Report is Organized into Key Areas and Includes:

EXECUTIVE OVERVIEW
PRESBYOPIA OVERVIEW
Epidemiology of Presbyopia
Refractive Errors
NON-SURGICAL PRESBYOPIA CORRECTION
Multifocal Glasses
Reading Glasses
Contact Lenses
SURGICAL PRESBYOPIA CORRECTION
MONOVISION
Monovision LASIK
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Multiple Ablation Zones
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Alcon, Inc. LADARVision
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Restoration of Accommodation
Scleral Relaxation Techniques
Refocus PresView (scleral expansion bands)
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Lenstec Kellan TetraFlex
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Acuity Ltd.
Advanced Medical Optics, Inc.
Alcon, Inc.
Allergan, Inc.
IntraLens, Inc.
Bausch & Lomb
Biolase, Inc.
Carl Zeiss Meditec AG
CustomVis, Inc.
Eyeonics, Inc.
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LaserSight Technologies, Inc.
LCA-Vision, Inc.
Medennium, Inc.
Moria, Inc.
Nidek, Inc.
NovaMed Eyecare, Inc.
NuLens Ltd.
Power Vision, Inc.
Refocus Group, Inc.
Refractec, Inc.
RestorVision
Schwind, Eye-Tech Solutions
SurgilLight, Inc.
TLC Vision, Inc.
Visiogen
WaveLight, AG

The Comprehensive Report on the Presbyopia Market was published in October 2005 and is printed in color and spiral bound for ease of reading. The price of the report is \$2,500. Additional copies and/or an Acrobat (.pdf) file are available for use within your company for \$250 each.

The Global Dry Eye Market Report

Author: David Harmon
April 2004

Our Global Dry Eye Market Report includes a detailed review of the epidemiology of dry eye, diagnostic tests, and treatment methods. Our report includes market size for lubricating drops and punctal plugs, average prices and market share by manufacturer.

The data included in our reports is based on quarterly surveys of ophthalmic surgeons, interviews with company executives and analysis of financial data.

Our Report is Organized into Key Areas and Includes:

INTRODUCTION

Scope of the Study
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Sjogren's Syndrome Foundation
Tear Film and Ocular Surface Society

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The Global Dry Eye Market Report was published in April 2004 and is printed in color and spiral bound for ease of reading. The price of the report is \$1,900. Additional copies and/or an Acrobat (.pdf) file are available for use within your company for \$250 each.

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Bausch & Lomb Millennium
Optikon Antares & Pulsar Minimal Stress Models
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COMPANIES PROFILED

Alcon, Inc.
Advanced Medical Optics, Inc.
AmSurg Corp.
Appasamy Associates
ARC Laser Corporation
Bausch & Lomb
BD Ophthalmic
Carl Zeiss Meditec AG
Corneal Labs
Dutch Ophthalmic Research (DORC)
Geuder GmbH
HCA- The Healthcare Company
HealthSouth, Inc.
IOLTech
Katena Products, Inc.
Kirwan Surgical Products, Inc.
Ellex Laser Systems
Lumenis
Mastel Precision
MicroSurgical Technologies
Nidek Co., Ltd.
NovaMed
Oertli Instruments, AG
Ophthalmed, Inc.
Optikon Oftalmologia S.P.A.
Paradigm Medical
Rhein Medical, Inc.
Staar Surgical
Surgical Design Corporation
Surgin, Inc.
TLC Vision
Zevex International

The Ophthalmic Single-Use Device Report

Author: William Freeman
September 2005

Our report on the ophthalmic single-use device market is a leading industry source for accurate and relevant information on all aspects of the ophthalmic single-use device market, including viscoelastics, balanced salt solutions, single-use instruments, and disposable products.

The data included in our reports is based on quarterly surveys of cataract surgeons, interviews with company executives and analysis of financial data.

Our Report is Organized into Key Areas and Includes:

- An overview of incidence and causes of cataracts and practices for treatment of cataracts worldwide.
- A description of surgeons, ambulatory surgery centers, hospitals and other providers of cataract surgery with a description of decision processes and buying patterns.
- An analysis of viscoelastics in use today with a detailed analysis of market share by units and dollars, plus projections for the next five years.
- A comparison of all viscoelastic products available along with properties and the use of each.
- An analysis of the market for balanced salt solution (BSS) including pricing, unit volumes and the trends that drive demand. Demand projections for the next five years are included.
- A description of the other disposable products used in cataract surgery including: sutures, disposable instruments, hemostatic devices, eye drapes, corneal shields, eye spears, and procedure packs. Current market share, units, prices and projected demand for the next five years are also included.

The report also profiles 32 companies involved in the development and manufacturing of ophthalmic single-use devices.

The **Report on Ophthalmic Single-Use Devices** was published in September of 2005. Reports are printed in color and spiral bound for ease of reading. The price of the report is \$2,250 and additional copies are available for use within your company for \$250 each. We also offer the Cataract Bundle including **The Ophthalmic Single-Use Device Report**, **The Worldwide IOL Market Report** and the **Cataract Surgical Equipment Market Report** for a discounted price of \$6,100.

To keep the report current, we provide quarterly updates of key tables such as procedure volumes, market share, prices, etc. **Quarterly Updates** are available approximately 45 days after the end of each calendar quarter and continue for a year, or four updates. The updates sell for \$3,350 for all four quarterly updates, or they are available separately for \$850 each.

The Surgical and Office-Based Diagnostic Equipment Market Report

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Surgical and Office-Based Diagnostic Equipment Market Glaucoma and Retinal Instruments Market Report

Our Reports are Organized into Key Areas and Include:

Author: William Freeman
March 2004

Surgical and Office-Based Diagnostic Equipment Market Report:

- Corneal Topography
- Wavefront Analyzers
- A-Scan Biometers
- Specular Microscopes
- Refractors
- Pachymeters
- Retinoscopes
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Glaucoma and Retinal Instruments Market Report:

- International Markets
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- Scanning Laser Ophthalmoscopes
- Ultrasound
- Fundus Cameras and Imaging Systems
- Electrophysiological Testing
- Indirect Ophthalmoscopes
- Diagnostic Lenses
- Company Profiles

The **Surgical and Office-Based Diagnostic Equipment Market Report** and the **Glaucoma and Retinal Instruments Market Report** were published in March of 2004. Reports are printed in color and spiral bound for ease of reading. **Surgical and Office-Based Diagnostic Equipment Market Report** is \$2,100 and the price for the **Glaucoma and Retinal Instruments Market Report** is \$2,500. A discounted price of \$4,000 is available for the purchase of both reports. Additional copies and/or an Acrobat (.pdf) file are available for use within your company for \$250 each.

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The Retinal Surgical Device Market Report

The Retinal Pharmaceutical Market Report

Author: William Freeman
March 2005

Our reports on the retinal surgical device market and the retinal pharmaceutical market are leading industry sources for accurate and relevant information on all aspects of the retinal market, including retinal market shares, average prices and market projections.

The data included in our reports is based on quarterly surveys of ophthalmic surgeons, interviews with company executives and analysis of financial data.

Our Reports are Organized into Key Areas and Include:

Retinal Surgical Device Market Report:

- Review of Retinal Diseases and Treatments
- Retinal Surgical Procedures
- Retinal Specialists and Societies
- Vitrectomy Machines and Machine Packs
- Hemostatic Devices
- Cryosurgical Systems
- Light-Source Consoles and Illuminator Probes
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- Ophthalmic Single-use items
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- 60 Color Tables and 65 Color Figures

Retinal Pharmaceutical Market Report:

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- Steroids
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- Cytomegalovirus (CMV) Retinitis Treatment
- Other Unique Treatments
- Vitamins
- Emerging Technology
- Company Profiles
- More than 80 Color Tables and over 90 Color Figures

The **Retinal Surgical Device Market Report** and the **Retinal Pharmaceutical Market Reports** were published in March of 2005. Reports are printed in color and spiral bound for ease of reading. The **Retinal Surgical Device Report** is \$1,800 and the price for the **Retinal Pharmaceutical Market Report** is \$2,950. A discounted price of \$4,200 is available for the purchase of both reports. Additional copies and/or an Acrobat (.pdf) file are available for use within your company for \$250 each.

Retinal Surgical Device Market Report Retinal Pharmaceutical Market Report

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 Erbe GmbH
 Eli Lilly
 Entremed
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 Genaera Corporation
 Genentech
 GenVec
 Gilead Sciences
 Geuder GmbH
 Grieshaber & Co. AG
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