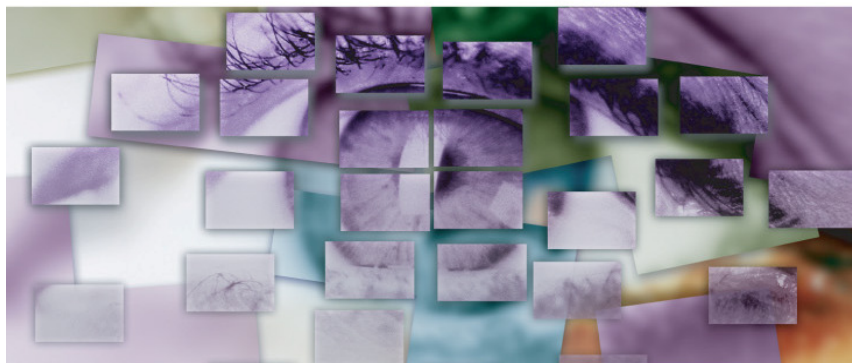


# THE LIFE SCIENCE DASHBOARD™

Key market indicators at a glance



Nucleic Acid  
Amplification  
Dashboard  
Sample Data



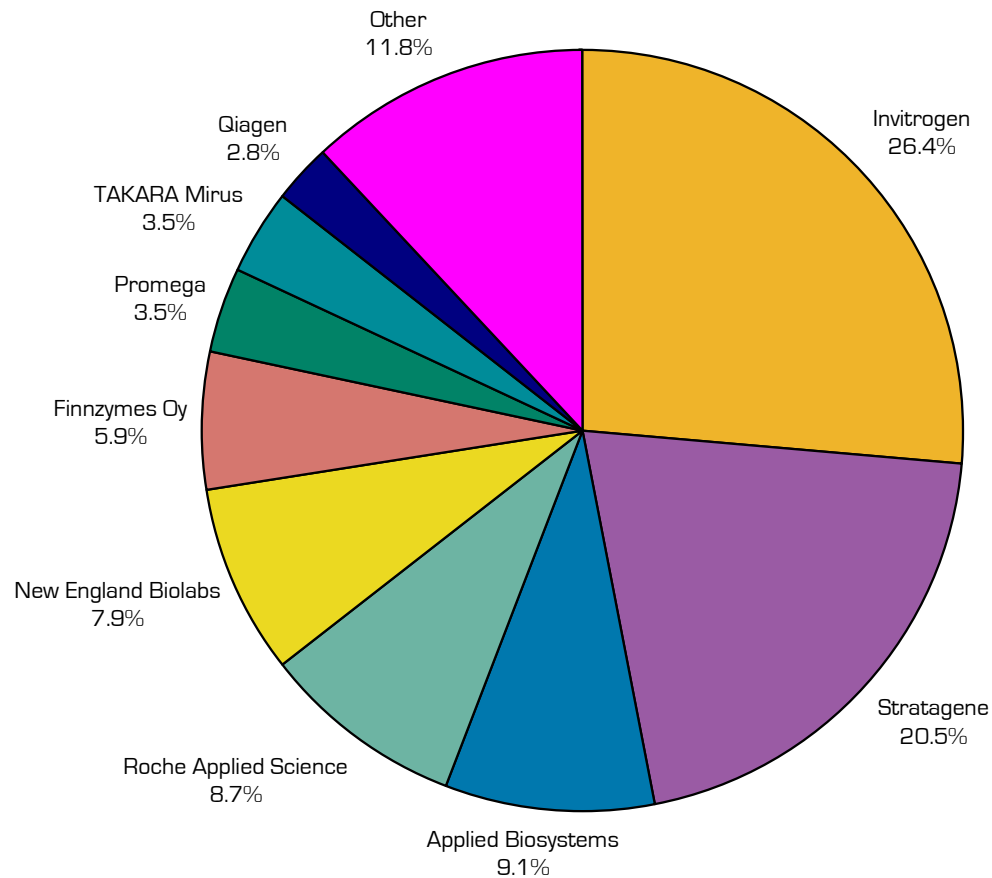
P e r c e p t a



SERIESONE  
JAN 07

**Figure 22: Respondent's Primary Supplier for Standard PCR with a Proofreading (High Fidelity) Polymerase**

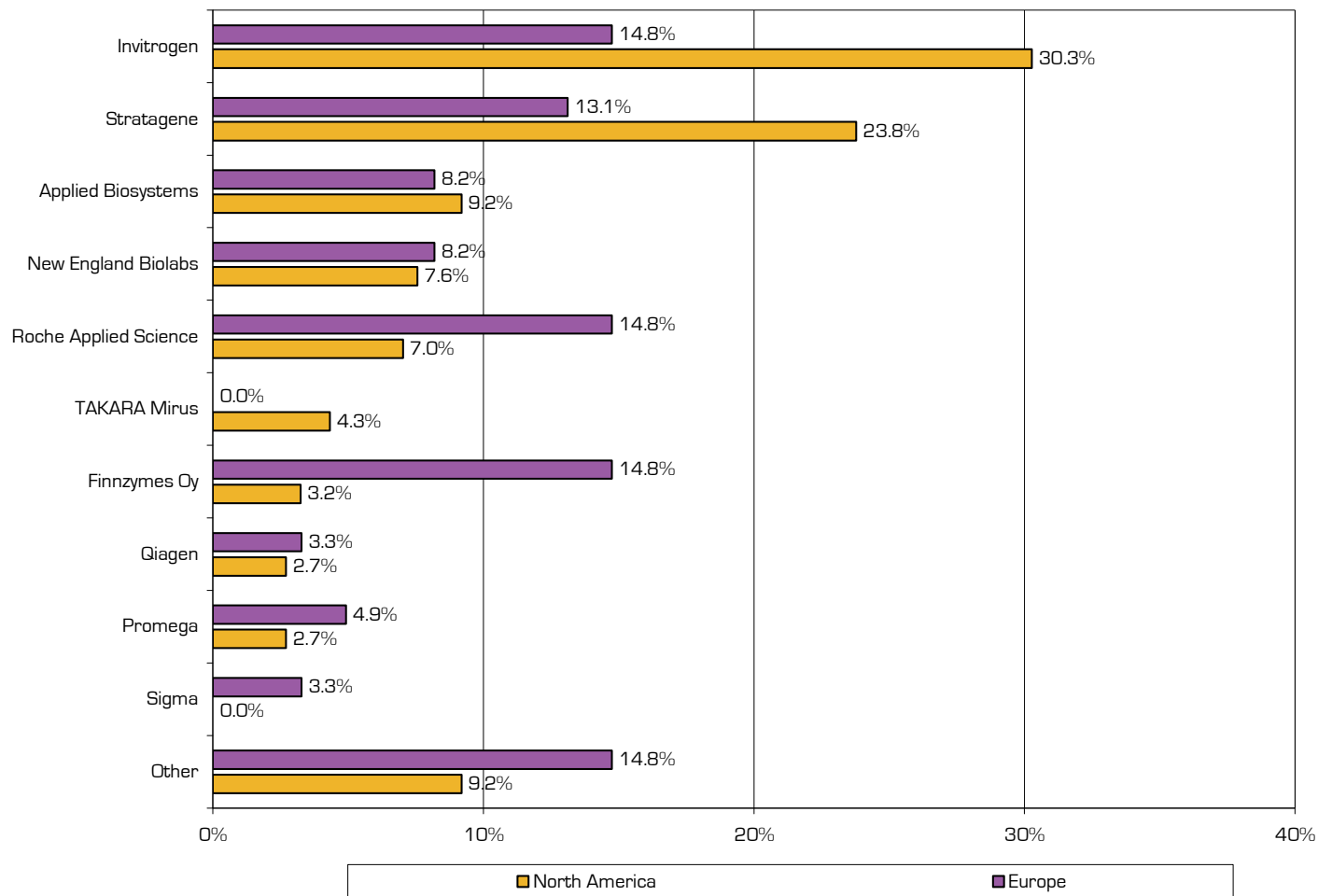
Q23. For those techniques that you currently perform, please select your primary supplier. If you do not perform a particular technique, ignore that row.



Top three suppliers account for 56.0% of the total market

Figure 23: Respondent's Primary Supplier for Standard PCR with a Proofreading (High Fidelity) Polymerase by Region

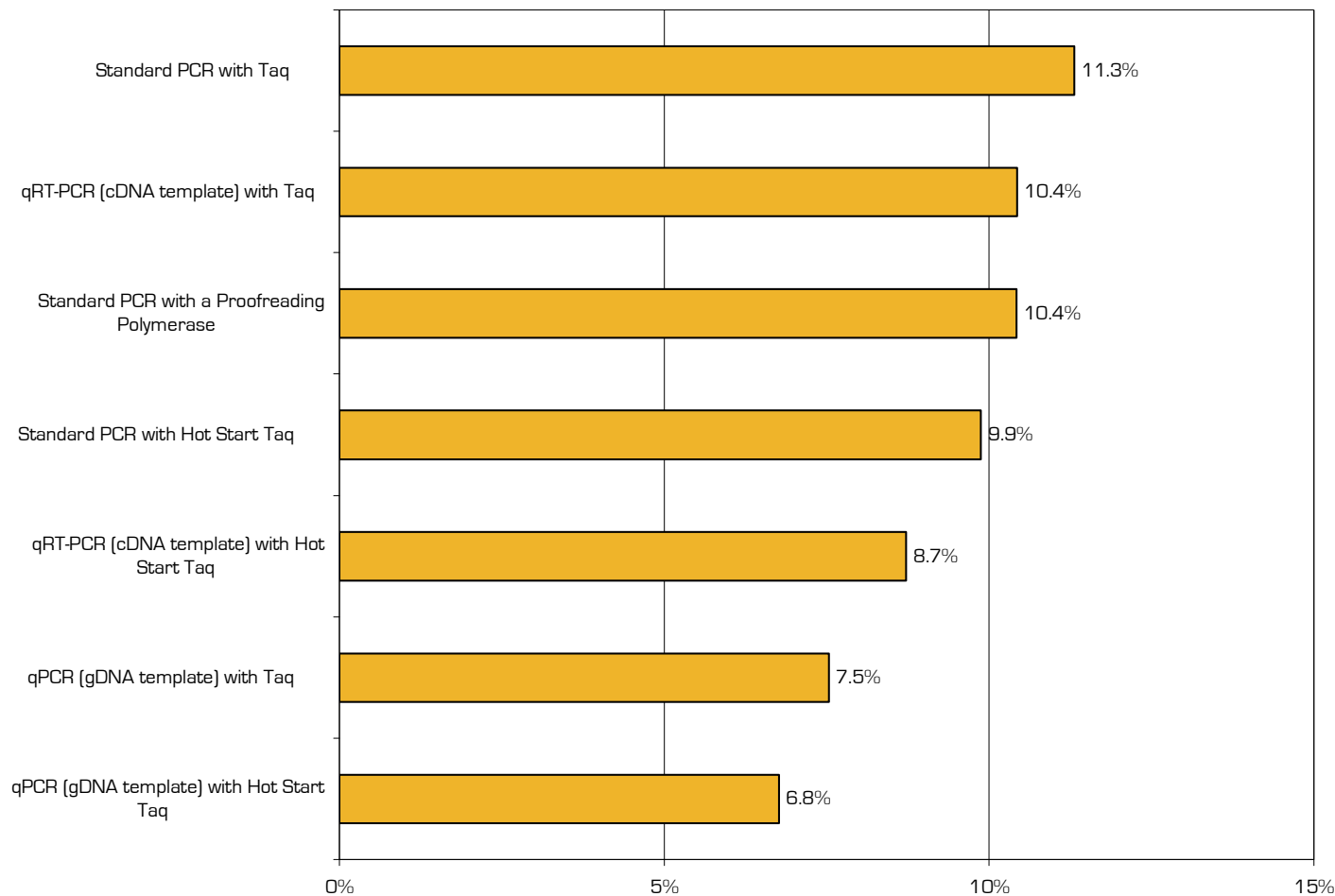
Q23. For those techniques that you currently perform, please select your primary supplier. If you do not perform a particular technique, ignore that row.



Invitrogen & Stratagene share of mention greater in North America; Roche & Finnzymes greater in Europe

**Figure 43: Percentage of Respondents That Have Switched Suppliers in the Last Six Months**

Q32. Have you switched suppliers in the last 6 months? Please select yes or no. If you do not use a particular product, ignore that row or select Not Applicable.



Switching rates greatest for standard PCR, lowest for qPCR with a hot start Taq polymerase