

BIO - TECH SYSTEMS, INC.

Market Research in the Health Care Field

NEWS RELEASE

4167 Pinecrest Circle West

Las Vegas, Nevada 89121

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(702) 456-7608 (702) 456-2189 FAX

E-Mail: biotechsystems@earthlink.net

Web Site: www.biotechsystems.com

FOR IMMEDIATE RELEASE

Contact: Marvin Burns

Tel: (702) 456-7608

Fax: (702) 456-2189

BIO-TECH SYSTEMS ANNOUNCES THE RELEASE OF A NEW PET REPORT:

Report 300: MARKET FOR PET RADIOPHARMACEUTICALS AND PET IMAGING

PRESENT AND EMERGING MARKETS FOR PET IMAGING, PROSPECTS FOR FDG SALES, U.S AND WORLDWIDE MARKETS FOR PET SCANNERS, NEW MOLECULAR TRACERS FOR PET, RUBIDIUM PET FOR CARDIOLOGY, CONTINUED DEMAND FOR PET INTERNATIONALLY, TECHNOLOGICAL TRENDS AND SALES FORECASTS TO 2016

Bio-Tech Systems Inc. announces the publication of a comprehensive report analyzing the markets for PET radiopharmaceuticals and PET imaging systems. This includes prospects for FDG sales and expanding markets in oncology, cardiology and neurology as well as rubidium PET for cardiology. The report provides a detailed analysis of opportunities in each area and covers the US and worldwide markets for PET scanners, indicating the dominance of high priced multi-slice PET-CT's. The proportion of international sales for PET has increased steadily as the technology becomes more readily available and the distribution of FDG improves. The report analyzes each of the market segments including mobile PET, which has been pressed recently because of reduced reimbursement. However, the larger mobile companies have survived, acquiring many of the smaller operators in the field. The report also discusses PET procedure volume by disease category with forecasts of future growth in lung cancer, lymphoma, breast cancer, colon cancer, melanoma as well as new indications that have been recently approved.

The report has a strong focus on new products and technology and emerging market opportunities. The overlap between PET and radiology, which was stimulated by the success of combined PET-CT systems, has allowed radiologists to promote the advantages of multi-modality imaging to both patients and investors in PET imaging facilities. As the availability of PET increases and its capabilities become more visible to referring physicians, it will encourage procedure growth in oncology as well as cardiology and neurology. Continued benefits of the National Oncologic PET Registry (NOPR) will help expand indications for PET and increase eligibility for reimbursement for many PET providers. New PET tracers are also in late stage development for diagnosing Alzheimer's disease and assessing myocardial perfusion in cardiology. In addition, new oncology agents will help in treatment monitoring and therapy planning for most common cancers, increasing the utilization of PET worldwide.

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GROWTH OF PET PROCEDURE VOLUME AND SALES OF FDG

The demand for PET procedures grew 7% in 2008 to about 1.8 million including rubidium studies. Procedure growth has slowed down in the past two years due to lower reimbursement. However, growth should recover to some extent in 2009 and 2010 and should reach 5.4 million procedures by 2016. Expanded applications of PET in oncology coupled with effective use of the NOPR PET Registry should help to broaden the base for PET. Although the dominant focus of PET is still in oncology, cardiology applications are increasing, including rubidium PET studies for myocardial perfusion. In addition, new PET perfusion agents are being developed for cardiology that will help expand the base for PET in this area. Several agents are also in development for diagnosing Alzheimer's disease that should be approved within the next few years. Furthermore, there are a number of novel oncology agents in development that will also stimulate procedure growth. Although reimbursement issues will have to be dealt with, it is likely that PET will eventually qualify for open coverage similar to CT and MR, which will add stimulus to the market for both PET scanners and radiopharmaceuticals.

SALES GROWTH OF PET IMAGING SYSTEMS

In 2008, U.S. sales of PET scanners declined 14% compared with 2007. Manufacturers took orders for 182 systems including refurbished units. Refurbished systems were priced at about half of the new scanners and accounted for 17% of the units ordered. Orders have been declining since 2006 as users try to adjust to reimbursement pressures. Nevertheless, technical advances have propelled the average unit price of new systems to \$1.8 million, with many systems priced at over \$2 million. These high technology scanners achieve resolution in the range of 2-3 mm, which is quite an accomplishment. Worldwide orders for PET scanners were also down but not quite as much as in the U.S. There were 271 scanners ordered internationally, with a worldwide total of 453 scanners including refurbished systems. International orders declined about 7% from the previous year, which was a smaller drop than in the U.S. Orders for PET scanners have also increased from remote parts of the world that previously lacked the technological expertise to pursue PET. Growth of the international market should help cushion the downturn in the U.S for PET manufacturers. By 2016, the market for PET scanners in the U.S. should grow to about 360 units and worldwide orders should reach about 900 units.

ABOUT THE AUTHOR

Marvin Burns is president of Bio-Tech Systems, Inc., founded in 1980 to perform market research for companies in the healthcare field. Burns specializes in market evaluation, where technological and scientific insight is important. He has prepared numerous reports on PET that have been widely distributed. He also reports on the markets for diagnostic and therapeutic radiopharmaceuticals, brachytherapy products, contrast agents, interventional cardiology and cardiac imaging. Burns has served as a consultant to many international firms and venture groups in strategic planning and development of new business opportunities. He has also been Technology Editor of Future Oncology, a publication widely circulated in the pharmaceutical and biotechnology industry, reporting on new developments in cancer diagnosis and treatment. Burns is a graduate of MIT and Harvard Business School's advanced management program. He has over 100 publications and 15 patents and invention disclosures. Prior to forming Bio-Tech Systems, he was employed by firms in life sciences, bioinstrumentation and medical imaging fields in general management, marketing and product development. He was also a hospital administrator in charge of professional and technical services including medical imaging, clinical laboratories, therapy services, and materials management.

THE MARKETFOR PET IMAGING: REPORT CONTENTS

SECTION I: PET Market Overview

Analysis of recent sales growth, competitive challenges and future prospects for PET.
Discussion of new indications for PET and effect on market growth. The topics include:

- Growth of primary applications for PET in oncology, cardiology and neurology. Effect of expanded indications on sales of FDG and PET scanners.
- Overview of PET scanner sales and impact of new products, particularly high resolution scanners and fast, multi-slice PET-CT systems.

SECTION II: Growth of PET Procedure Volume

Driving forces affecting growth of PET procedures. Historic and forecast PET procedure volume in oncology, cardiology and neurology, by disease group.

- Distribution of PET procedures by disease group. Forecasts of procedure volume growth in lung cancer, breast cancer, lymphoma, colon cancer, melanoma and other cancers.
- Discussion of PET reimbursement and expanded indications in oncology. Prospects for continued growth of PET procedures.

SECTION III: Analysis of the FDG Market

- Historic and forecast sales growth of FDG by application and disease group.
- Analysis of FDG suppliers and challenges in producing and delivering FDG. Competitive prospects, pricing pressures and growth of companies supplying FDG.

SECTION IV: US and Worldwide Market for PET Scanners

- Distribution of PET sales by manufacturer; Siemens, GE, Philips. Discussion of marketing strategies and future outlook.
- Product mix of fixed site and mobile scanners. Pricing trends and competitive strategies of PET manufacturers.

SECTION V: US AND Worldwide PET Sales Forecasts

- US and worldwide sales forecasts for PET scanners by type of installation including fixed site and mobile PET systems.
- Analysis of the market environment for future growth of PET, both US and internationally. Discussion of new products, technological prospects and user demand.

SECTION VI: Growth of US and Worldwide Installed Base

- US and worldwide forecasts of installed base from 2006-2016. Rationale underlying the growth of installed base in all product categories.
- Changes in market environment that may affect growth of installed base.

SECTION VII: End-User Profile

- Analysis of end-user groups and comparative requirements for PET imaging.
- Procedure mix and product utilization in hospitals and clinics. Allocation of imaging procedures and equipment by hospital bed size.

LIST OF EXHIBITS—MARKET FOR PET IMAGING

HISTORIC AND FORECAST PET PROCEDURE VOLUME FOR RADIOLOGY, RADIOLOGY AND ONCOLOGY BY PROCEDURE TYPE FROM 2006-2016

HISTORIC AND FORECAST PET PROCEDURE VOLUME IN RADIOLOGY BY TYPE OF DISEASE FROM 2007-2016

HISTORIC AND FORECAST SALES OF FDG DOSES FOR RADIOLOGY, RADIOLOGY AND ONCOLOGY BY PROCEDURE TYPE FROM 2006-2016

HISTORIC AND FORECAST SALES OF FDG DOSES FOR RADIOLOGY APPLICATIONS BY DISEASE TYPE FROM 2007-2016

HISTORIC AND FORECAST SALES OF RUBIDIUM DOSES FOR RADIOLOGY PET PERFUSION STUDIES FROM 2006-2016

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WORLDWIDE UNIT ORDERS FOR NEW AND REFURBISHED PET SCANNERS, UNITS ORDERED BY MANUFACTURER AND MARKET SHARE IN 2007-2008

WORLDWIDE ORDER VOLUME OF NEW AND REFURBISHED PET SCANNERS, SALES VOLUME BY MANUFACTURER AND MARKET SHARE IN 2007-2008

U.S. ORDERS FOR MOBILE PET SCANNERS, UNITS ORDERED BY MANUFACTURER AND MARKET SHARE FROM 2005-2008

U.S. ORDER VOLUME OF MOBILE PET SCANNERS, SALES VOLUME BY MANUFACTURERS AND MARKET SHARE FROM 2005-2008

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U.S. HISTORIC AND FORECAST ORDER VOLUME FOR NEW AND REFURBISHED PET SCANNERS FROM 2006-2016

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HISTORIC AND FORECAST WORLDWIDE ORDER VOLUME FOR NEW AND REFURBISHED PET SCANNERS FROM 2006-2016

LIST OF EXHIBITS—MARKET FOR PET IMAGING

GROWTH OF U.S. AND WORLDWIDE
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HOSPITAL BED SIZE IN 2008

ORDER FORM

Report No. 300 - MARKET FOR PET RADIOPHARMACEUTICALS AND PET IMAGING

The report is priced at \$9,500 plus \$4,500 for a global license

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BIO-TECH SYSTEMS, INC.
4167 W. Pinecrest Circle
Las Vegas, Nevada 89121
Telephone: (702) 456-7608 FAX (702) 456-2189
E-Mail: biotechsystems@earthlink.net
Website: www.biotechsystems.com