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NAVIGANT CONSULTING FINDS NEW MARKET OPPORTUNITIES EMERGING FOR HIGH-THROUGHPUT SCREENING TECHNOLOGIES

Innovations spur demand for microarray technologies, detection methods and informatics

SAN MATEO, Calif., Jan. 28, 2004 – Front Line Strategic Market Reports™ analysts from Navigant Consulting, Inc. (NYSE: NCI) see higher demand for high-throughput screening (HTS) technologies used to analyze biomolecules, as data is used widely to develop improved drugs and discover new biomarkers. The analysts also found that companies are amplifying their efforts to optimize existing HTS systems in terms of accuracy, throughput and cost effectiveness, utilizing novel concepts and technologies to address this growing market.

In the report, entitled “*Novel High-Throughput Screening: A Strategic Market Outlook*,” the analysts describe the impact of innovation in three key areas: novel microarray technologies, emerging labeling and detection technologies and informatics. Primary information for the report was gathered by conducting interviews with suppliers and end-users with novel high-throughput product knowledge. Supporting information was also collected from secondary sources, including news releases, SEC filings, industry websites and scientific periodicals.

“Growth for HTS technologies will continue steadily across all sectors, but the boom will occur as diagnostic applications are introduced into the clinical segment,” said Ali Arjomand, Ph.D., Director of Technical Business Development at Combimatrix. “In the next 5-7 years, there will be a significant diagnostic market for HTS microarrays that monitor gene mutations or changes in gene expression. These systems will gather data on relatively few genes, but will do so for tens of thousands of samples at central labs. There could be large gains over several years once that market is developed.”

The global market for novel HTS technologies is poised to grow at approximately 19 percent compounded annually over the next five years, with Biacore, Quantum Dot, Vitra Bioscience, SomaLogic and other companies developing products that enable critical scientific advancements. Novel microarray technologies and emerging labeling and detection technologies are projected to account for approximately 55 percent and 42 percent

of the novel HTS market in 2009, respectively. Current market leaders offer novel products that include surface plasmon resonance sensor chips, lab-on-a-chip microfluidics and nanochip electronic microrarrays.

According to Navigant Consulting's research and analysis, the worldwide novel HTS market will reach nearly \$225M by 2004 and \$540M by 2009, driven by systems modeling, early stage ADMET testing and the increased use of microfluidics.

"Companies attempting to enter this market must position themselves for success by staying abreast of current and potential future technologies and focusing on the needs of the end-user," says Julie Watts, Associate, Front Line Strategic Market Reports Division for Navigant Consulting.

For additional details, complimentary PDF sample pages or to order "**Novel High-Throughput Screening: A Strategic Market Outlook**," please contact Chris Kammer or Anil Patel of Navigant Consulting at 650.525.1500 x145 or 650.525.1500 x135, respectively.

About Navigant Consulting

Navigant Consulting, Inc. (NYSE: NCI) is a specialized independent consulting firm providing litigation, financial, restructuring, energy, healthcare and operational consulting services to government agencies, legal counsel and large companies facing the challenges of uncertainty, risk, distress and significant change. The Company focuses on industries undergoing substantial regulatory or structural change and on the issues driving these transformations. "Navigant" is a service mark of Navigant International, Inc. Navigant Consulting, Inc. (NCI) is not affiliated, associated, or in any way connected with Navigant International, Inc. and NCI's use of "Navigant" is made under license from Navigant International, Inc. More information about Navigant Consulting can be found at www.navigantconsulting.com.

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