

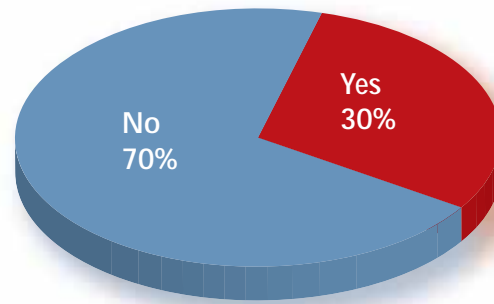
Carousel and Robot Storage & Retrieval Systems

This area has seen little change over last year as adoption rates have grown from 29% to 30%. However, a strong commitment to systems currently in place is evidenced as respondents report moving toward purchasing systems rather than continuing to lease them, along with reporting a second year in a row of very high satisfaction ratings. Carousels and robots rank third among all pharmacy automation solutions in user satisfaction. Notably, a majority of those currently without automated storage and retrieval systems (52%) plan to purchase them in the near future.

3rd Place in User Satisfaction

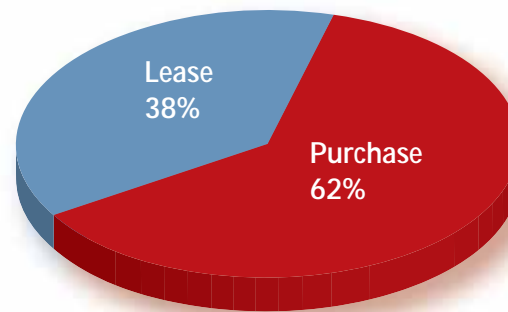
For more information on carousel and robot vendors, circle number 908 on the reader service card, or visit www.findit.pppmag.com.

System Adoption



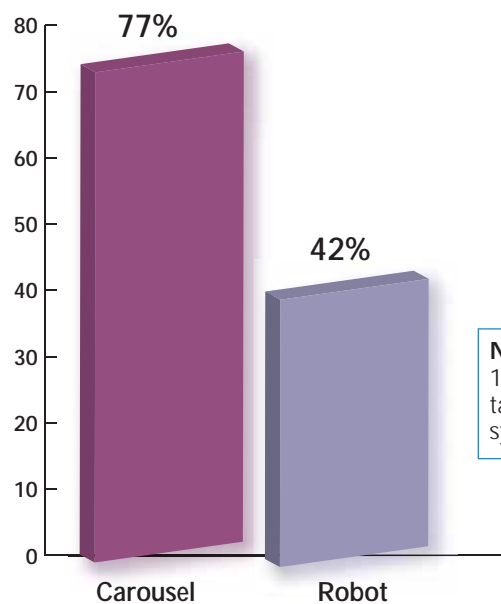
◀ **The automation solutions** for drug storage and retrieval — carousels and robots — are currently implemented in a minority of hospitals. However, with 30% of all hospitals using carousels and robots, there are a significant number of hospitals benefiting from this automation.

Purchase vs. Lease



▲ **A majority of hospitals** (62%) report owning their systems versus leasing them. This is a significant change over last year's ownership of 46%, perhaps reflecting the general satisfaction respondents report with their systems and their commitment to keep their current systems in place.

Carousels vs. Robots

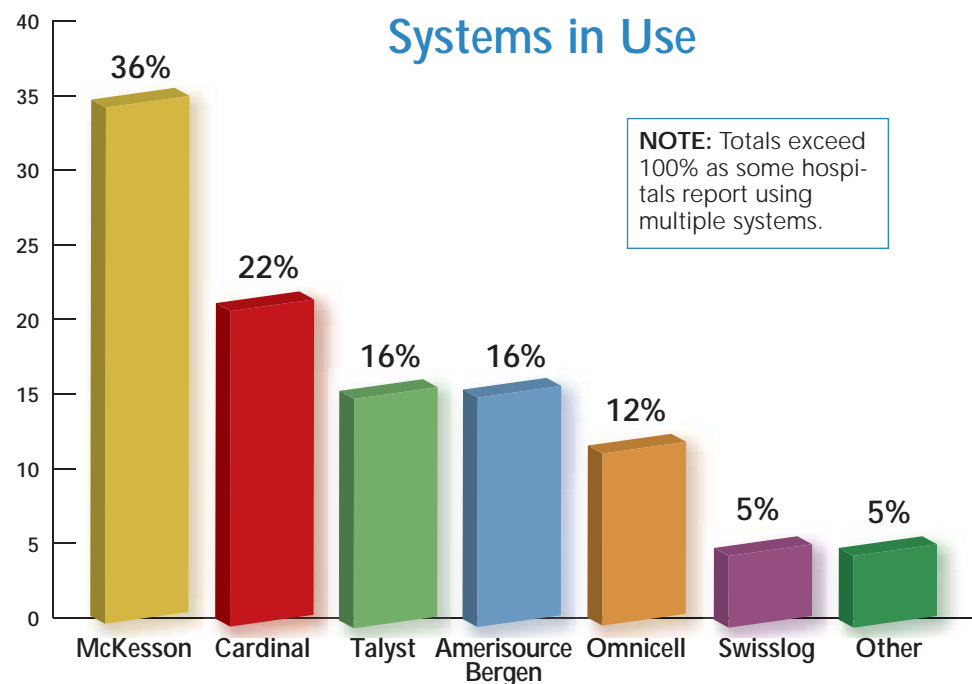


NOTE: Totals exceed 100% as some hospitals report using both systems.

▲ **Of those facilities** with automated drug storage and retrieval processes, carousels are the more commonly implemented solution.

▶ **McKesson has continued** their market share growth for the second year in a row, now holding the first place spot. Talyst has experienced heady growth this year, moving to 16% market share from 5.4% in 2007. Amerisource Bergen and Swisslog have also seen increases in their market share.

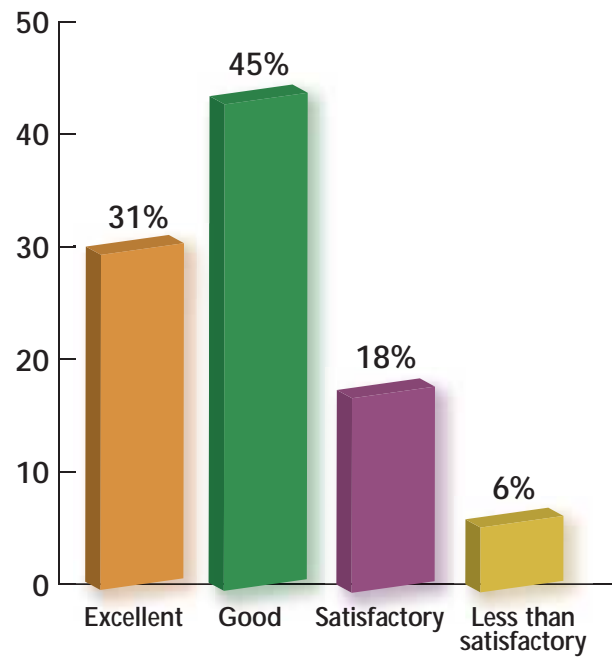
Systems in Use



NOTE: Totals exceed 100% as some hospitals report using multiple systems.

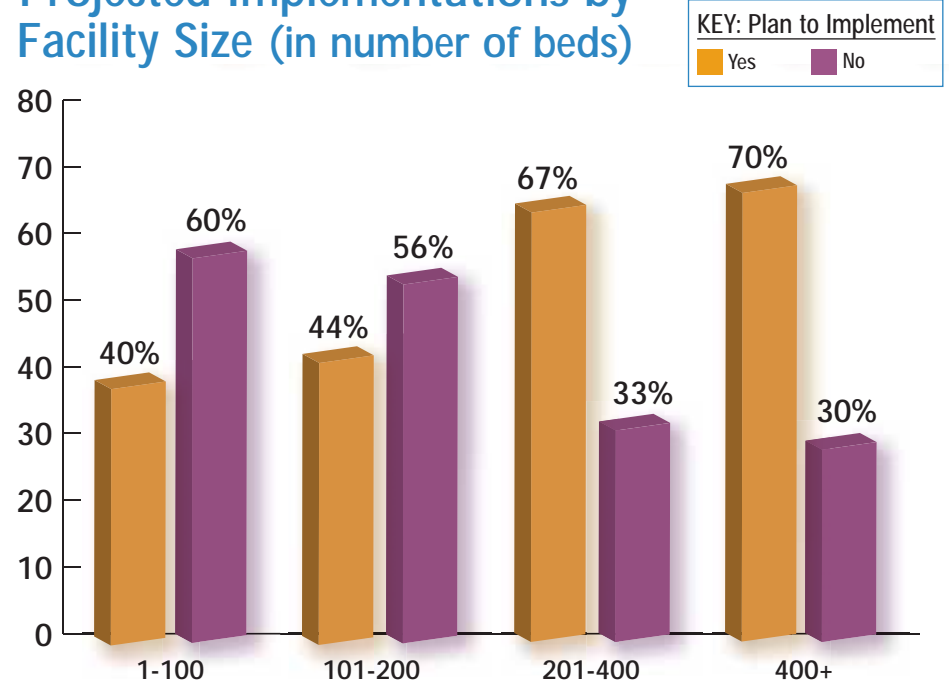
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User Satisfaction



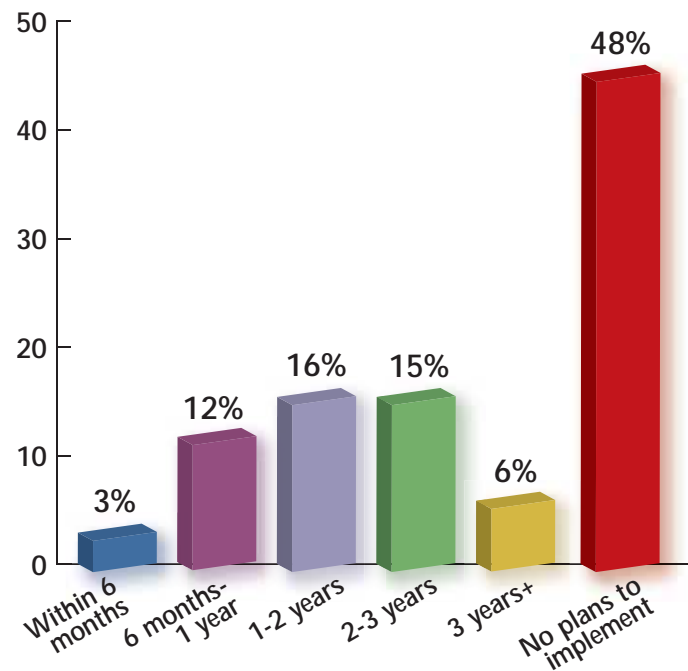
▲ **For two years in a row**, robot and carousel users have reported very high satisfaction with their systems. 94% rate their systems satisfactory or better.

Projected Implementations by Facility Size (in number of beds)



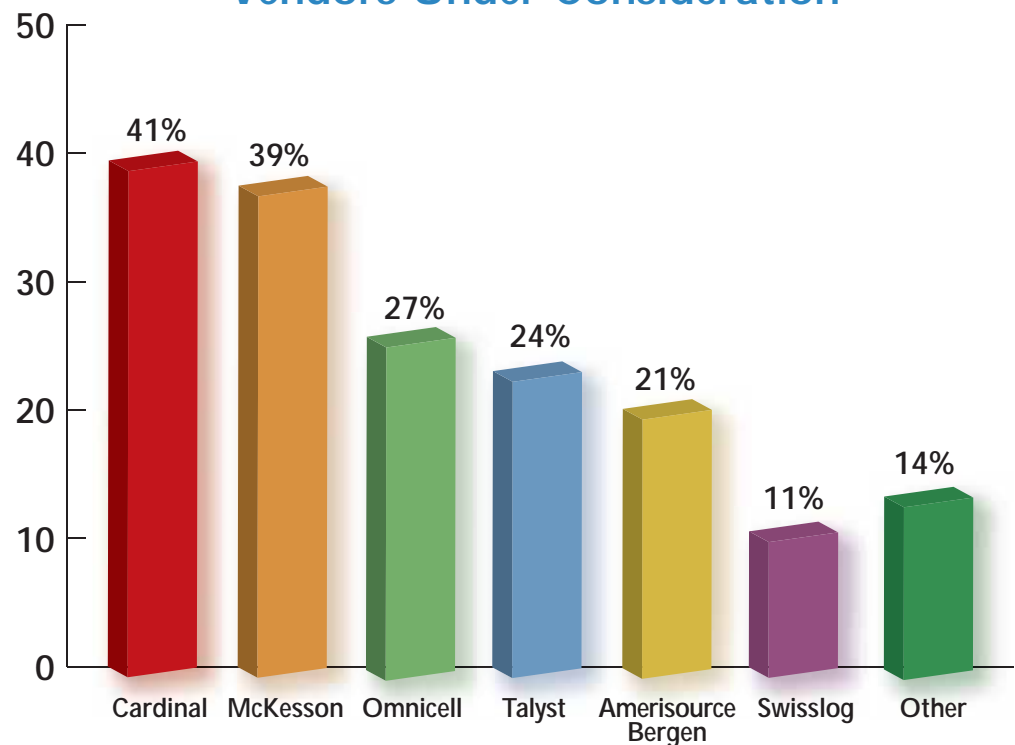
▲ **A strong majority** of the larger facilities (200+ beds) plan to implement an automated solution for drug storage and retrieval. Smaller hospitals are also looking at these solutions, with 40% of the smallest hospitals (less than 100 beds) planning to implement a robot or carousel in the near future.

Projected Timeframes to Adoption



▲ **A majority** (52%) of those who have not yet implemented an automated system for drug storage and retrieval plan to do so.

Vendors Under Consideration



▲ **A cross section of vendors** are under consideration for the purchasing process.