1995 NORTH AMERICAN MARKET FOR BATCH TERMINALS CLAIMS A 50% MARKET SHARE

According to Venture Development Corporation (Natick, MA), overall, the North American market for batch data collection terminals increased only 5.5 percent from 1994 to 1995. The industrial sector share of the North American market for batch Portable Data Collection Terminals increased 8.7 percent in 1995 to reach $422.9 million - a 50.0 percent market share.

In sharp contrast to the marginal performance of the batch PDCT market, RF PDCT market revenues grew 17.0 percent from 1994 to 1995.

Inventory control, shipping and receiving continued to be the largest applications for data collection terminals and terminal systems in the overall 1995 North American market.

For more information: Venture Development Corporation, Natick, MA, PH (508) 653-9000, FX (508) 653-9836, E-mail: vdc4u@aol.com.

Growing Debate Over AIM Statistics Program Could Affect Entire ADC Industry

Most Automatic Data Capture vendors agree that accurate industry statistics are a valuable tool in marketing and a host of other business functions. What they do not agree on is the method of gathering the information needed to develop meaningful statistics. And AIM USA staff members are in the middle of the debate.

At a recent AIM meeting, a proposal was made that the AIM staff begin a program for gathering, interpreting and publishing a variety of statistics about the ADC industry. The scope of the proposal is not yet clear. In our interviews with a number of AIM members, we received mixed reactions to the proposal as well as a wide variety of suggestions about the kinds of information that should and should not be gathered.

Some members believed the statistics should be all encompassing, including everything from market growth by technology to employee wages and benefits. Others felt the information should be very basic. President/CEO for AIM USA, Larry Roberts stated, "From conversations with both our members and industry analysts, we determined two things: there is a definite lack of good ADC industry statistics and this shortage is crippling our growth, particularly with respect to investment by the financial community."

Chairman of the board for AIM USA [and the chairman/CEO of PSC Inc.,] L. Michael Hone told us, "Every professional, every manager, and every executive needs accurate and timely information for planning and decision making. Doctors rely on blood pressure, temperature and lab tests. Politicians rely on polls. By having relevant, timely information, companies in our industry can better plot their courses. We can make informed decisions, not guesses. As a result, the industry as a whole will grow, creating more opportunities for all of us."

John Paxton, chairman/CEO, Monarch Marking, added,
"We are a very fragmented industry. Because of this, there is a great need for the anonymous gathering of meaningful statistics by an independent agency. Statistics such as revenue growth, profitability, the fastest-growing industry segments [eg. industrial, transportation, POS, health care], and the European market potential would be of great value to ADC vendors.

"These statistics would answer such questions as: 'What am I doing wrong in my business?' and 'Is my product meeting customer needs?' Statistics are a great management tool and would eliminate much of the guessing that plagues ADC companies."

Two main fears of those who disagreed with the proposal were the lack of confidentiality and the loss of trade secrets [competitive advantage]. Other concerns were falsification of information and duplication in the sales growth figures.

Ann Marie Cook, electronics products manager, Weber Marking Systems, was one of the more vocal opponents of the program. Cook claimed, "Accurate industry statistics would be valuable, but I question the ability of AIM to gather meaningful information. Historically, these surveys have not been very accurate. It is the methodology I question, not the need."

Continuing, Cook stated, "The two main aspects that invalidate these surveys are duplication of data and lack of participation on an industry-wide basis. Data is often duplicated because a manufacturer lists its sales, a distributor lists its sales and a VAR lists its sales. One product can actually be sold three times before it reaches the end-user. Because of this, product sales figures are frequently invalid."

"The lack of participation by all vendors is even more damaging to the accuracy of statistics. You can't comment on the total market for a product if you haven't had total participation by all manufacturers of that product. Privately-held companies generally do not participate in these surveys and when they do, the information they provide is inaccurate."

Jud Miner, vice president of development, Data 2, and another opponent of the program, stressed, "My concern is that there will be too little or too much data [supplied to AIM]. If too little data is collected, the statistics will be meaningless. If too much information is collected, AIM may not have sufficient staff to process the data."

The Venture Development Corporation is a staff of experts who gather ADC industry statistics, so we asked them what problems an organization may incur when doing this type of survey. Christopher Rezendes and Christina Bertsch, members of the Automatic Identification/Automatic Data Collection Group at VDC, responded with the following:

"AIM USA is in the process of trying to build consensus for an association-sponsored statistical program. The proposed statistical program would address the unique requirements of the AID/ADC industry with respect to products offered, markets served, and channels maintained within the diverse
and fragmented AID/ADC supplier community. Many associations, focused on the electronics industry, have attempted similar endeavors with varying degrees of success. Based on VDC's work with and observations of these parallel efforts, we have identified some specific issues that could potentially inhibit the consensus necessary for AIM's development of a valid statistics program.

• Agreement on the need for an AIM-sponsored statistics program. The AID/ADC supplier community - including AIM members - is a diverse, fragmented group of companies with unique requirements and opinions of industry research.

• Definition of proposed industry research scope.

• Accurate estimates of the time and financial resources required of each program participant.

• Universally-acceptable terms of disclosure - How much information will each program participant need to disclose to meet the goals and objectives of the programs?

• Universally-accepted terms of dissemination - Who will receive what information, when, and for how much?

• Enforcement policies for program participation, disclosure and dissemination.

• Procedures for maintaining and updating the resulting information base.

"The successful development and implementation of an AIM-sponsored statistics program will depend strictly on the identification, definition and remediation of these key issues. Consensus on these issues will be necessary for AIM USA's development of a reliable and cost-effective, statistical program for the AID/ADC community."

AIM's Roberts placed great importance on providing the financial community with the statistics it is requesting. Because of this, we contacted Paul Mathans, vice president, The Robinson-Humphrey Company, an analyst who follows the ADC industry. Mathans told us the investment community wants the big picture, not minute specifics. Its number one question is, "What is the market [for a particular product]?” Mathans also stated that the ADC industry has done a poor job of answering this question.

Another important question he cited is, "Who's going to use this product?" "You can gain valuable insight into the chance of success [in sales] for a product by knowing who will use it," said Mathans. "For instance, if the product is used in retail, large warehouses or the government, there is a good chance for success because of market size."

A public company must work hard to earn stock market attention, according to the analyst. "We're not interested in price points and product features," Mathans explained. "We want to know what market the product will address and the size of that particular market. It is also important to know if the market is going up or down with respect to growth."

"A good example is the radio frequency market," Mathans continued. "We do not concern ourselves with what frequency the radios run on. We want to know if the new spread-spectrum radios are going to do well in the global market."

According to Mathans, vendors think analysts expect them to give up their competitive advantage. "Not so," said Mathans. "We merely want accurate figures provided on an anonymous basis. However, your competitors already know your sales volume and what markets you're targeting, or their marketing director isn't doing his job."

Mathans is scheduled to speak at an AIM-sponsored breakfast/meeting during the upcoming SCAN-TECH trade show in Chicago. The breakfast will be held on November 6, from 8:00 a.m. to 9:00 a.m. at McCormick Place. In addition to Mathans, Donald R. Leavens, vice president and chief economist for the National Electrical Manufacturers Association, will speak on the value of meaningful, industry statistics. This breakfast meeting will formally launch the statistics program, according to Hone, who will also address attending members. Invitations to member presidents and CEOs will be mailed soon.

(Comment: There is no question that meaningful statistics on industry size and forecasted, sales growth are a valuable asset to marketing managers, presidents, CEOs, and industry analysts. Accurate statistics are crucial to the growth of any industry and
as Paul Mathans stated, "necessary to attract the interest of the investment community."

From our conversations with ADC industry members, we are reminded of the childrens' story about the "Little Red Hen." No one wanted to help the Little Red Hen bake her bread, but all were willing to help eat the bread. Although it is not quite that bad in the case of the statistics program [many are willing to offer support], many companies are willing to use the information [if it is available], but are not willing to provide the necessary data to give meaning to the numbers.

Public companies are more willing to participate because the law requires them to publicly disclose much of the information needed for the survey. Private companies seem hesitant to release any information about niche markets or profit centers that are working well for them. But without the input from the private sector, no industry or market size statistics can be valid.

We hope that as AIM undertakes this program, it does not bite off more than it can chew. The program should start out small and grow with time. We suggest beginning with a thorough study of one technology. Then build on what is learned from the experience and gradually develop a more comprehensive package. In our opinion, AIM has neither the staff nor the money to undertake a program of the magnitude some members are proposing.)

For more information: AIM USA, Pittsburgh, PA, PH (412) 963-8588, FX (412) 963-8753; Data 2, St. Peters, MO, PH (314) 278-8888, FX (314) 278-2180, E-mail: jud@data2.com; Monarch Marking, Miamisburg, OH, PH (513) 865-2142, (513) 865-6690; PSC, Inc., Webster, NY, PH (716) 265-1600, FX (716) 265-5453; The Robinson-Humphrey Company, Inc., Atlanta, GA, PH (404) 264-4201, FX (404) 266-6440; Weber Marking Systems, Arlington Heights, IL, PH (847) 364-8534, FX (847) 364-8575; Venture Development Corp., Natick, MA, PH (508) 653-9000, FX (508) 653-9836, E-mail: vdc4u@aol.com.

Telxon Alleges False And Misleading Advertising By Symbol Technologies

Telxon officials could not be reached at press time but we received word that the Akron, OH, corporation has filed a complaint in the U.S. District Court for the Northern District of Ohio against Symbol Technologies Inc. of Holtsville, NY, alleging violations of Section 43(a) of the Lanham Act.

In the complaint, Telxon claimed that Symbol made false and misleading representations about its own and Telxon's radio products regarding the issues of standards compliance, upgradability and availability.

Telxon stated in the release, "This activity is harmful to the industry as a whole and our action is intended to assist customers and others from being needlessly and injuriously confused in the process of making purchasing and planning decisions regarding the use of wireless networks in their own businesses."

Telxon's claim seeks a preliminary and permanent injunction ordering Symbol to "discontinue its false and misleading statements." The injunction also would require Symbol to issue a public retraction.

Simultaneously, Symbol issued a press release announcing it had learned of the impending suit "through the media." "We have not yet seen the actual complaint, but based on the information currently available, we think the suit is totally without merit," said Dr. Jerome Swartz, chairman and CEO of Symbol.

In SCAN/DCR (8/9/96), we reported that some of the stock market analysts we had spoken with said they had heard rumors about Telxon and its products. However, the analysts declined to say where they heard the rumors. We will update our readers as more news becomes available.

For more information: Symbol Technologies, Holtsville, NY, PH (516) 738-4069, FX (516) 738-4164; Telxon Corporation, Akron, OH, PH (330) 873-3700, FX (330) 873-2889, E-mail: cload@telxon.com.

ScanSource Sales Soar ...
President Mike Baur Explains Why

With an across-the-board increase in sales by product lines, as well as continued market penetration, ScanSource Inc. recently announced record financial results for its fiscal year ended June 30, 1996. Net sales for the year increased 63% to $55.7 million compared to $34.2 million for the year ended June 30, 1995. Net sales for the fourth quarter increased 80% to $18.04 million, compared to $10.05 million for the same quarter 1995.

In the last issue of SCAN/DCR (8/23/96), we noted that Peak Technologies' sales are nearing $250 million, making it the fourth largest company in the ADC industry. ScanSource's sales surpassed industry analysts' predictions of $50 million for its fiscal year just ended. Now, analysts predict sales of 737 to $85 million for the distributor's next fiscal year. ADC vendors developing distribution channels.
increasingly turn to organizations like ScanSource and Peak Technologies as a more economical method of marketing their products.

However, the question arises, "How will the industry change as VARs and distributors outgrow their vendors?" Peak is Symbol Technologies' largest customer. If Peak accounted for 50% of all Symbol's sales [not an actual figure], could it dictate company policy to Symbol?

In four short years, Mike Baur and Steve Owens [ScanSource's founders] have built a strong organization marketing ADC products. Before going into business, the two men surveyed VARs to find what concerns resellers had and if there was support for the proposed ScanSource business plan. The main difference between ScanSource and Peak Technologies is that a majority of Peak's sales are to end-users and all of ScanSource's sales are to VARs.

"Peak Technologies really led the way in this market," said Baur, ScanSource president. "Nic Toms [Peak's chairman & CEO] exhibited a very intelligent business strategy. Every time Toms acquired another Symbol [Technology] reseller, he immediately improved Peak's profits because it increased the company's buying power. Everybody knows that bigger volumes offer bigger discounts with respect to purchasing product."

ScanSource's success in the ADC market should not be considered a duplication of Peak Technologies' story. Unlike Peak, ScanSource will not pursue the European market. Although ScanSource does some business in Canada, it does not focus on the Mexican market because of a lack of reseller demand.

Baur intends to expand ScanSource's market. Although he has and will continue to consider acquisitions, he has no specific plans. Because ScanSource has limited its acquisitions, Baur can use business profits to grow his market. These profits fund magazine ads, trade shows and direct mail to enhance future sales.

Baur also created his own quarterly trade show called, "Solutions USA", to attract new business. Four shows have been held so far in various U.S. cities. The next show is slated for October 16 in Dallas, Texas.

Shows last one day and normally draw 500 to 600 attendees, mostly computer resellers looking to expand their product offerings by becoming ADC VARs. Baur considers these shows and his company's sales activities as great ADC industry promoters.

ScanSource handles all support functions for its VARs including inventory financing. Baur has a technical support team which not only answers questions, but also assists in showing VARs how to install the systems his company sells. This emphasis on providing total solutions is the company's closest parallel to Peak.

ScanSource offers multiple lines of bar code hardware and is always looking for more "channel-friendly" products. Like Peak, the distributor uses mainly Symbol Technologies' products in its radio frequency [RF] solutions. It also offers the Hand Held Products line in its RF systems. Recently, Baur added a new support group of almost 60 engineers to assist VARs in setting up RF systems.

Baur claims to be a firm supporter of industry standards and feels the recently passed IEEE 802.11 D4 radio frequency interoperability specification will do a great deal to increase sales for ADC VARs. Baur stated, "The more we get away from proprietary systems, the better our business will be. New standards will definitely increase [ADC] industry sales."

Baur believes more and more manufacturers will be selling their products through distributors and resellers. "Open systems mean lower profit margins for manufacturers," explained Baur. "Because of this, ADC vendors need less expensive ways to sell their products. A well-organized distributor/VAR channel will be an easy way to meet this challenge."

For more information: ScanSource, Inc., Greenville, SC, PH (864) 288-2432, FX (864) 288-1165, E-mail: scansource.com.

AIM And ISO At Odds Over Small Pet RFID Standards

In recent months, we have monitored the debate over interoperability of radio frequency LAN [local area network] system components and associated industry standards. But some may not realize that a similar argument has been going on for more than five years over radio frequency pet identification.

Radio frequency identification [RFID] of pets is the process of surgically implanting a radio frequency "transponder" [or microchip] into an animal for identification purposes. A veterinarian performs the procedure which is harmless to the animal. If a lost animal [with an implanted transponder] is found
and taken to an animal shelter, the animal is scanned by a radio frequency “reader” to determine its owner.

Pet owners pay an average of $20 to $35 to have transponders implanted in their animals and for registration. The fee is paid to the veterinarian and some manufacturers offer discounts for multiple-pet registration. Information about the pet’s ownership is generally stored in a national, database located at the manufacturer’s facility. A scan of the tag informs the shelter to call the manufacturer to obtain this information.

Unfortunately, there are three systems [in the U.S.] on the market which are, for the most part, incompatible. As a result, participating shelters might have to scan an animal with three different readers to obtain an ID. The debate concerns the development of a universal standard for small pet ID.

To familiarize our readers about the ongoing debate, SCAN/IDCR spoke with Dan Mullen, AIM USA and Keith Myhre, vp of business development for Infopet ID Systems. This will not be an easy problem to resolve.

The three major companies marketing small pet RFID systems in the U.S. are Destron/Fearing Corp., Infopet ID Systems, and AVID (American Veterinary Identification Device). Most of these companies began in the eighties. Destron Fearing was the first company to develop a transponder for small pet ID commercial use. At the time, Infopet ID marketed Destron/Fearing’s products. In 1990, Infopet switched to an RF system developed by Trovan, Ltd.

AVID developed a proprietary encryption and a product which reads both its own product and that of Destron Fearing. Destron Fearing’s product will not read AVID’s transponders and Infopet’s product reads only its own transponders. All three companies offer free readers to animal shelters. Transponders are sold by the veterinarians who physically implant them in the animals.

In 1991, ISO [the International Organization for Standardization] formed a working group [ISO TC23/SC19/WG3] to develop standards for animal identification. Specifically, the working group was to address electronic ID of “livestock” and only later decided to include pet ID. It has since offered two standards [ISO Standards 11784 and 11785] which pertain to animal RFID. These standards were developed mainly from a proposal offered by Texas Instruments, AEG, Datamars, Nedap and Trovan. The standards are transponder-based, which means they call for standardization of the transponders.

One problem with these proposals is they seem to discount patent infringement problems. The major players in small pet ID all have patents on their products. ISO has agreed to list all patents [to be cautious of] in its standards, but does not really solve or prevent disputes between manufacturers.

Another problem is that these standards were developed around livestock ID requirements which are not as stringent as pet ID. As Myhre stated, “Nobody really cares if two cows have the same ID. But if you have a registered champion cocker spaniel worth thousands of dollars, it is very important not to confuse it with a mongrel puppy.”

Because U.S. manufacturers of small pet ID systems did not believe ISO would address their interests, they approached AIM USA with a proposal to develop their own standards. In 1993, AIM USA formed the Small Animal RFID Task Force (RF-TF-SA/96-006). The task force is made up of interested RFID pet system manufacturers, the American Kennel Club, the National Animal Control Association, the American Humane Association, the American Veterinary Medical Association, the AIM USA Technology Group and other interested parties.

In contrast to ISO, the AIM task force standard proposal surrounds the reader device, not the transponder. It proposes that companies be allowed to continue producing proprietary transponders. The emphasis is on developing a standard reader which will accept information from all transponders. Fearing ISO would publish its standards this year before the AIM task force could finish its proposal, AVID filed an objection with ISO claiming its standards do not globally address: 1.) Uniqueness of code [ISO has not guaranteed it will even address codes and numbering systems at this point] and 2.) The incompatibility problems surrounding some manufacturers’ transponders/readers.

One serious aspect of animal ID that both organizations need to resolve is a unique numbering system to avoid duplication. Some foreign countries have organizations that control the numbering systems and some have only one supplier of pet ID systems, so it is not as problematic for them. In the U.S., there is no agency governing pet identification...
Executive Turmoil At Advanstar

by George Goldberg

A scorecard may be needed to keep track of the changes in the executive lineup at Advanstar.

Advanstar Holdings was created when Hellman & Friedman Capital Partners bought the company last May. Actually, its only current "holding" is Advanstar Communications — which has three operating divisions involved in business publishing, exhibition management and marketing services.

In July, the new owners brought in Robert Krakoff as chairman/CEO and Jim Alic as vice chairman of the newly-formed Advanstar Holdings. Both Krakoff and Alic had been senior executives at Reed Elsevier (the giant publishing/show management competitor of Advanstar).

Last month (SCAN/DCR 8/9/96), we reported the July 31 resignation of Bill Windsor as president of Advanstar Expositions. Windsor left Advanstar to start his own company devoted to trade magazines and expositions. That move was of particular interest to ADC vendors since the Expositions Division owns and operates the ID Expo and ID Info trade shows in the US; as well as the SCAN/TECH Europe and SCAN/TECH UK shows in Europe. To fill the gap left by Windsor's departure, Alic stepped in as "acting" president of the Expositions Division.

Just three weeks later, on August 20, Advanstar announced the retirement (for medical reasons) of Gary Ingersoll, president/CEO of Advanstar Communications. Ingersoll had joined Advanstar in January 1995 and was credited with leading the financial turnaround of the company before its sale to Hellman & Friedman.

Concurrent with the announcement of Ingersoll's retirement, Advanstar also revealed that Brian Nair, president of the company's publishing division, had resigned to take a position at Cahners Publishing Company (a division of Advanstar's chief rival, Reed Elsevier). Nair had previously served as president of Advanstar's Exposition Division until 1994 when Windsor took over.

With the sudden departure of these three top operating officers, Krakoff and Alic have stepped into the breach. Krakoff, who was formerly chairman and CEO of Cahners Publishing, will serve as chief executive officer of Advanstar Communications (replacing Ingersoll) and will directly oversee Advanstar Publishing (Nair's old job). Advanstar Publishing's properties include Automatic ID News and its three international editions.

We recently questioned Jim Alic about the company's dramatic loss of executive talent. "It's a 'good news/bad news' situation," he told SCAN/DCR. "The bad news, of course, is that we lost three valuable executives. The good news, however, is that Bob [Krakoff] and I are much more involved in the actual details of running this business. We will learn quickly about the properties in publishing and trade shows."

Alic insisted that the departures of the three officials in just a few short weeks were a result of "unfortunate coincidences" unrelated to the new owners and new management. He stated that it may be months before the company comes up with a new plan to accommodate these sudden and unexpected changes. In the meantime, he said that they are pleased with their involvement in automatic data capture and plan to remain active in this industry. "Bob and I are both familiar with the marketplace," he pointed out, "because we did the SCAN-TECH deal while we were at Reed" (Reed bought the SCAN-TECH show from AIM/US in 1994).

[Advanstar is currently one of three bidders for UK-based Blenham Expositions. (Reed and United Expositions are the other bidders.) Blenham — whose annual sales of $324 million are almost three times that of Advanstar — owns and manages show properties in France, U.S., UK and Germany. From our conversation with Alic, it is apparent that Hellman and Friedman are intent on becoming major worldwide players in the publishing/exposition industry and that they have the resources to back it up.]
SCAN/DCR Market Watch
For September 4, 1996

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