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[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

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Patient Monitoring Systems

US Industry Study with Forecasts for **2012 & 2017**

Study #2323 | April 2008 | \$4600 | 346 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Trends	5
Demographic Patterns	8
Health Care Trends	10
Health Insurance	11
Medical Conditions.....	13
Acute Conditions.....	13
Chronic Conditions	15
National Health Expenditures	19
Medical Providers.....	23
Outpatient Clinics	24
Skilled Nursing Homes.....	25
Acute Care Hospitals.....	25
Physicians.....	26
Patient Activity.....	27
Acute Care Hospital Admissions	28
Surgical Procedures	29
Outpatient Visits.....	29
Home Health Care	30
Medical Product Markets.....	32
Surgical Appliances & Supplies	33
Surgical & Medical Instruments	34
Electromedical Equipment	34
In Vitro Diagnostic Products	35
Analytical Instruments.....	35
Dental Supplies & Equipment	36
Ophthalmic Goods.....	36
Lab Apparatus & Furniture.....	36
Patient Monitoring Systems Overview	37
Technology.....	37
Regulation.....	40
Historical Demand Patterns	42
US Trade.....	44
International Markets	47

PRODUCTS

General	50
Patient Monitoring Equipment.....	52
Multi-Parameter Monitors.....	55
Network Multi-Parameter Monitors	57
Fixed & Transportable Network	
Multi-Parameter Monitors	59
Patient-Worn Telemetry Monitors	61
Central Patient Monitoring Stations	63
Remote Patient Monitors.....	66
Standalone Multi-Parameter	
Patient Monitors	68

Cardiac Monitors.....	71
ECG Monitors	73
Holter Monitors.....	76
Heart Rate Meters	79
Cardiac Output Monitors	82
Respiratory & Anesthesia Monitors	85
Respiratory Monitors.....	86
Peak Flow Meters	87
Spirometers	90
Capnographs	92
Pulmonary Function	
Analysis Equipment.....	96
Anesthesia Monitors	99
Blood Pressure Monitors	105
Professional Blood Pressure Monitors.....	107
Home Blood Pressure Monitors	109
Public Blood Pressure Stations	111
Blood Glucose Monitors	112
Self-Testing Blood Glucose Monitors.....	114
Professional Blood Glucose Monitors.....	117
Electronic Thermometers.....	119
Neurological Monitors	121
Electroencephalograph (EEG) Monitors...	123
Electromyography (EMG) Monitors.....	125
Other Neurological Monitors.....	126
ENG Monitors	126
Intracranial Pressure Monitors.....	127
Intraoperative Monitors (IOMs)	128
Fetal & Neonatal Monitors.....	129
Antepartum Monitoring	130
Intrapartum Monitoring.....	131
Neonatal Monitoring	132
Producers & Products	132
Pulse Oximeters.....	135
SET & RAINBOW SET Technologies	137
OXIMAX Technology	138
Licensees	139
Apnea Monitors.....	139
Blood Flowmeters	143
MRI Monitors	146
Coagulation Monitors	149
Other Patient Monitoring Equipment.....	153
Home Alert Systems.....	154
All Other Patient Monitoring Equipment.	155
Bed Occupancy Monitors	155
Body Fat Analyzers.....	156
Esophageal Monitors	156
Eye Movement Monitors	156
Home Cholesterol Monitors	157
Patient Monitoring Accessories.....	158
Blood Glucose Test Strips.....	160
Producers.....	162
Products & Innovations	162
Patient Monitoring Electrodes.....	164

Lancets & Lancing Devices	166
Lancets.....	167
Lancing Devices	169
Patient Monitoring Catheters.....	171
Patient Monitoring Sensors	173
Technologies	174
Producers & Products	175
Other Patient Monitoring Accessories.....	177
Temperature Probes & Strips	178
Cables & Wires	180
Other Monitoring Test Strips	181
Gels, Adhesives & Related Preparations..	181
All Accessories.....	182

MARKETS

General	183
Home Health Care	186
Blood Glucose Monitoring Products.....	187
Other Home Patient Monitoring Products...	189
Hospitals	191
Market Overview	193
Patient Monitoring Systems Demand	194
Outpatient Facilities.....	197
Ambulatory Surgery Centers.....	198
Urgent Care Centers & General	
Medical Clinics	200
Other Outpatient Facilities	201
Physicians' Offices.....	202
Nursing Homes	204
Other Markets.....	206

INDUSTRY STRUCTURE

General	210
Market Share	213
Competitive Strategies.....	215
Philips Healthcare	216
Johnson & Johnson	216
GE Healthcare	217
Roche	217
Medtronic.....	218
Abbott Laboratories	218
Bayer.....	219
Covidien.....	219
Becton Dickinson.....	220
Welch Allyn	220
Other Competitors.....	220
Mergers & Acquisitions.....	223
Licensing & Related Agreements.....	227
Research & Development.....	232
Marketing & Distribution	233
Manufacturing	236

(continued on next page)

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Table of Contents

(continued from previous page)

COMPANY PROFILES

Abbott Laboratories.....	238
ARKRAY Incorporated.....	240
Aspect Medical Systems	242
Bayer AG	245
Becton, Dickinson and Company.....	249
Bio-Med Devices	251
Bionostics plc.....	252
Biotel Incorporated.....	253
Cooper Companies.....	256
Covidien Limited.....	258
Datascope Corporation.....	262
Draegerwerk AG	265
Fukuda Denshi	269
General Electric	271
Hospira Incorporated.....	276
Johnson & Johnson.....	278
Masimo Corporation	282
Medtronic Incorporated.....	285
Mennen Medical.....	291
Midmark Corporation	294
Nihon Kohden	296
OMRON Corporation	300
OSI Systems	304
Roche Holding.....	309
Royal Philips Electronics	313
Schiller AG.....	321
Transoma Medica.....	323
Welch Allyn.....	325
Other Companies Mentioned in Study	330

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Indicators	7
2 Population by Age Group	10
3 Acute Conditions by Type	15
4 Chronic Conditions by Type	18
5 National Health Expenditures by Type.....	22
6 Medical Providers by Type.....	24
7 Patient Activity by Type	28
8 Home Health Care Activity	31
9 Medical Product Demand.....	33
10 Patient Monitoring Systems Demand, 1997-2007	44
11 US Trade in Patient Monitoring Systems ...	46
12 World Patient Monitoring System Demand	49

PRODUCTS

1 Patient Monitoring Systems Demand by Product Group.....	51
2 Patient Monitoring Equipment Demand	54
Cht Patient Monitoring Equipment Demand by Type, 2007.....	55
3 Multi-Parameter Patient Monitor Demand .	56
4 Network Multi-Parameter Patient Monitor Demand	58
5 Fixed & Transportable Network Monitor Demand	61
6 Patient-Worn (P-W) Telemetry Monitor Demand	63
7 Central Patient Monitoring Station Demand.....	66
8 Remote Patient Monitor Demand.....	68
9 Standalone Multi-Parameter Patient Monitor Demand	71
10 Cardiac Monitor Demand.....	72
11 ECG Monitor Demand.....	73
12 Holter Monitor Demand	77
13 Heart Rate Meter Demand.....	80
14 Cardiac Output Monitor Demand	83
15 Respiratory & Anesthesia Monitor Demand	86
16 Respiratory Monitor Demand	87
17 Peak Flow Meter Demand	90
18 Spirometer Demand	92
19 Capnograph Demand	96
20 Pulmonary Function Analysis (PFA) Equipment Demand	99

21 Anesthesia Monitor Demand.....	100
22 Blood Pressure Monitor Demand.....	107
23 Blood Glucose Monitor Demand	114
24 Medical Electronic Thermometer Demand	121
25 Neurological Monitor Demand.....	122
26 Fetal & Neonatal Monitor Demand.....	130
27 Pulse Oximeter Demand.....	137
28 Apnea Monitor Demand	143
29 Blood Flowmeter Demand	146
30 MRI Monitor Demand	148
31 Coagulation Monitor Demand	153
32 Other Patient Monitoring Equipment Demand	154
33 Patient Monitoring Accessory Demand ...	159
Cht Patient Monitoring Accessory Demand by Type, 2007.....	160
34 Blood Glucose Test Strip Demand	161
35 Patient Monitoring Electrode Demand	166
36 Lancet & Lancing Device Demand.....	167
37 Patient Monitoring Catheter Demand	173
38 Patient Monitoring Sensor Demand.....	174
39 Other Patient Monitoring Accessory Demand	178

MARKETS

1 Patient Monitoring Systems Demand by Market	185
Cht Patient Monitoring Systems Demand by Market, 2007.....	185
2 Home Health Care - Patient Monitoring Systems Demand.....	187
3 Hospitals - Patient Monitoring Systems Demand.....	193
4 Outpatient Facilities - Patient Monitoring Systems Demand.....	198
5 Physicians' Offices - Patient Monitoring Systems Demand.....	204
6 Nursing Homes - Patient Monitoring Systems Demand.....	206
7 Other Markets - Patient Monitoring Systems Demand.....	209

INDUSTRY STRUCTURE

1 US Patient Monitoring Sales by Company, 2007.....	211
Cht Patient Monitoring Systems - US Sales by Company, 2007.....	215
2 Selected Acquisitions & Divestitures.....	224
3 Selected Cooperative Agreements.....	229

Blood glucose testing strips will claim nearly half of all accessories sales by 2012 based on a growing prevalence of diabetes and greater efforts to reduce the number of undiagnosed cases.

US demand to grow 5.9% annually through 2012

US demand for patient monitoring systems will increase 5.9 percent annually to \$12 billion in 2012. Advances in wireless and sensor technologies will bolster growth by leading to the introduction of new equipment and accessories with enhanced performance capabilities. Patient monitoring procedures will increase throughout the primary health care sector based on contributions to improved therapeutic outcomes and efficiencies. The market for self-monitoring activities will also expand as chronic care patients, especially persons with diabetes, heart disorders and asthma, are encouraged by medical groups to focus more on preventive care.

Blood glucose test strips to drive accessories market

Demand for patient monitoring accessories will increase 7.1 percent annually to \$6.6 billion in 2012. Blood glucose testing strips will account for close to half of all sales based on upward trends in the prevalence of diabetes and enhanced efforts by the health care sector to reduce the number of undiagnosed cases. The expansion of diabetes education programs will encourage diabetic patients to follow established guidelines for self-testing and periodic professional examinations. As a result, demand for diabetes monitoring supplies is projected to increase at a strong pace and reach \$4 billion in 2012. The best



opportunities will emerge in electrochemical blood glucose test strips, which require less blood and yield faster and more accurate results than older photometer reflectance test strips. The expansion of ECG and other vital signs monitoring activities in hospitals and outpatient centers, coupled with the development of advanced generation products based on microchips, will boost sales of patient monitoring catheters, electrodes and sensors.

Equipment market to grow 4.5% annually

The market for patient monitoring equipment will increase 4.5 percent annually to \$5.4 billion in 2012. Based

on contributions to health care quality, productivity and cost efficiency, wireless multi-parameter network monitors will remain the top-selling product group. Remote monitors that transmit data via the Internet or telephone will see the fastest growth as they hold promising potential to save health care costs by reducing the need for hospitalizations and outpatient episodes. Blood pressure monitors will provide mixed growth prospects. Devices for home use will post strong gains as consumers assume more personal responsibility for their own health care. By contrast, cost containment pressures and relatively saturated markets will keep sales of professional blood pressure monitors growing slowly at best.

Sample Text, Table & Chart

PRODUCTS

Network Multi-Parameter Monitors -- Network multi-parameter monitors include all devices and equipment linked together in integrated monitoring systems that extend to all or most patient care areas in hospitals. Included in this product group are bedside monitors; portable and stationary monitors and modules; centralized monitoring stations; and patient-worn telemetry devices. Additionally, recorders that transmit patient vital signs information to medical professionals via the Internet and cell phones are classified as network multi-parameter monitors. In total, this product group is forecast to realize demand of \$5.7 billion in 2007, an increase of 10.5 percent annually from 2007.

SAMPLE TEXT

and the extent of growth opportunities for network multi-parameter monitors are determined primarily by new and existing hospital capacity. Over the next several years, the industry is expected to upgrade patient monitoring capabilities with advanced technologies that improve patient outcomes and enhance operating efficiencies. This trend will especially benefit demand for wireless telemetry devices and systems. Less favorably, cost containment pressures will continue to limit overall hospital demand for network multi-parameter monitors. Only devices and systems that contribute to faster patient recovery, shorter institutional stays and reduced inpatient mortality will command strong growth in this market segment.

Based on cost-saving and convenience advantages, multi-parameter remote network monitors are well-positioned for growth in the medical community. These devices enable physicians to assess the general health status of chronic care patients regularly without the need for in-office or in-clinic visits. Multi-parameter remote network monitors will also build up sizeable demand in hospitals as institutions seek to minimize the length of inpatient stays by expanding post-release patient follow-up capabilities.

57

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TABLE III-4

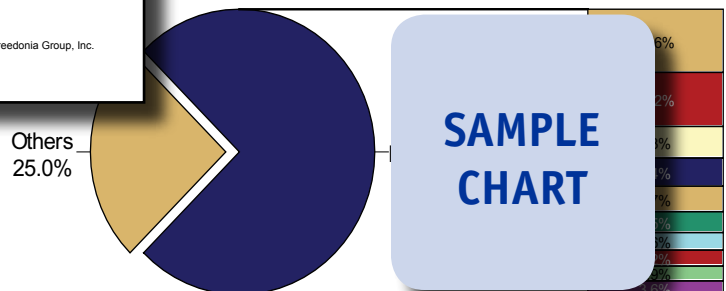
NETWORK MULTI-PARAMETER PATIENT MONITOR DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Acute Care Hospitals	57	65	75	85	100
1000\$ network m-p monitors/hospital					50
Network M-P Monitor Demand					100
Fixed & Transportable Monitors					30
Patient-Worn Telemetry Monitors					35
Central Monitoring Stations					40
Remote Monitors					45
% network monitors					9
Multi-Parameter Patient Monitors					40

SAMPLE TABLE

CHART V-1

MONITORING SYSTEMS - US SALES BY COMPANY, 2007 (\$9 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Masimo Corporation

40 Parker
 Irvine, CA 92618
 949-297-7000
<http://www.r>

Revenues: \$
 US Revenue
 Research and
 Employment

**SAMPLE
PROFILE**

Key Product (2007)
 wired and wireless multiple patient floor monitoring systems, and
 related software

Masimo is a developer, manufacturer and marketer of noninvasive blood constituent patient monitoring products. The Company held an initial public offering in August 2007.

Masimo's products are available through three main lines: Patient Monitoring Solutions, Remote Alarm and Monitoring Solutions, and Software. Products include pulse oximeters, oximeter sensors, network-linked wired and wireless multiple patient floor monitoring systems, and related software.

Products -- In 2007, the Patient Monitoring Solutions line generated revenues of \$199 million. Products from this line consist of pulse oximeters and oximeter sensors. Masimo's pulse oximeters employ the Company's MASIMO SIGNAL EXTRACTION TECHNOLOGY (MASIMO SET) software platform, which utilizes five signal processing algorithms to deliver high precision, sensitivity and specificity in

TABLE IV-4

OUTPATIENT FACILITIES - PATIENT MONITORING SYSTEMS DEMAND (million dollars)

Item	1997	2002	2007	2012	2017
Outpatient Clinics (000)	550	621	688	746	796
000\$ patient monitoring sys/facility					
Outpatient Facility Demand					
Patient Monitoring Equipment:					
Multi-Parameter Monitors					
Cardiac Monitors					
Respiratory & Anesthesia Monitors					
Blood Pressure Monitors					
Blood Glucose Monitors					
Electronic Thermometers					
Other Equipment					
Patient Monitoring Accessories:					
Blood Glucose Testing Supplies					
Electrodes, Sensors & Catheters					
Other Accessories					
% outpatient					
Patient Monitoring Systems Markets	4760	6380	9010	12000	15900

**SAMPLE
TABLE**

"Outpatient facilities will continue to comprise a large, diverse market for patient monitoring systems, with total product demand advancing 4.7 percent annually to \$1.6 billion in 2012. Growth will reflect increasing activities in same-day surgery, ambulatory cardiac testing, general and urgent care services, and diagnostic imaging. Similar to hospitals, outpatient facilities will provide sales opportunities for a wide variety of patient monitoring equipment and accessories. Among the products expected to fare well in the ambulatory sector are ..."
 --Section IV, pg. 197

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OTHER STUDIES

Dental Products & Materials

US demand for dental products will rise 4.5% per year through 2012, aided by favorable population trends and continued interest in cosmetic dentistry. More concern about overall good health will provide added opportunities for mouthwash/dental rinses, sealants, fluoride treatments and other products. This study analyzes the US dental product and material industry, with forecasts for 2012 and 2017 by product and raw material. It also evaluates company market share and profiles leading industry competitors.

#2313 03/2008..... \$4500

Drug Delivery Systems

US demand for drug delivery systems will grow 10% annually through 2012. Oral types will remain the largest drug delivery category while parenteral, inhalation and implantable systems grow the fastest. Parenteral formulations will eventually surpass oral dosages as the largest product group. This study analyzes the \$80.2 billion US drug delivery system industry, with forecasts for 2012 and 2017 by material, type and application. It also evaluates company market share and profiles leading industry players.

#2294 03/2008..... \$4500

Implantable Medical Devices

US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and defibrillators. Bone cement, tissue and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the \$27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

#2255 10/2007..... \$4500

Infection Prevention Products & Services

US demand for infection prevention products and services will grow 4% annually through 2011, driven by efforts to combat healthcare-acquired infections. Services will outpace supplies and equipment. Among products, surgical drapes and gowns will remain dominant while waste disposal and sterilization supplies will lead gains. This study analyzes the \$13.8 billion US infection prevention industry, with forecasts for 2011 and 2016 by type and market. It also evaluates market share and profiles major players.

#2234 08/2007..... \$4400

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products will grow 5.1% annually through 2011. Clinical chemistry and immunoassay methods will remain the top two IVD sciences, while nucleic acid testing products will continue to generate the fastest gains. Hospital labs will stay the largest market while home health care will grow the fastest. This study analyzes the \$15.2 billion US IVD industry to 2011 and 2016 by product, application and market. It also evaluates company market share and profiles major players.

#2175 04/2007..... \$4500

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