

Blood Flow Measurement Devices & Accessories Worldwide

A Market Strategy Report

Report Highlights

June 2006

Report Benefits

This report can help in:

- Assessing the market for Blood Flow Measurement Devices and Accessories, growth segments, and growth regions.
- Understanding market drivers and restraints.
- Business planning, strategic decision making and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

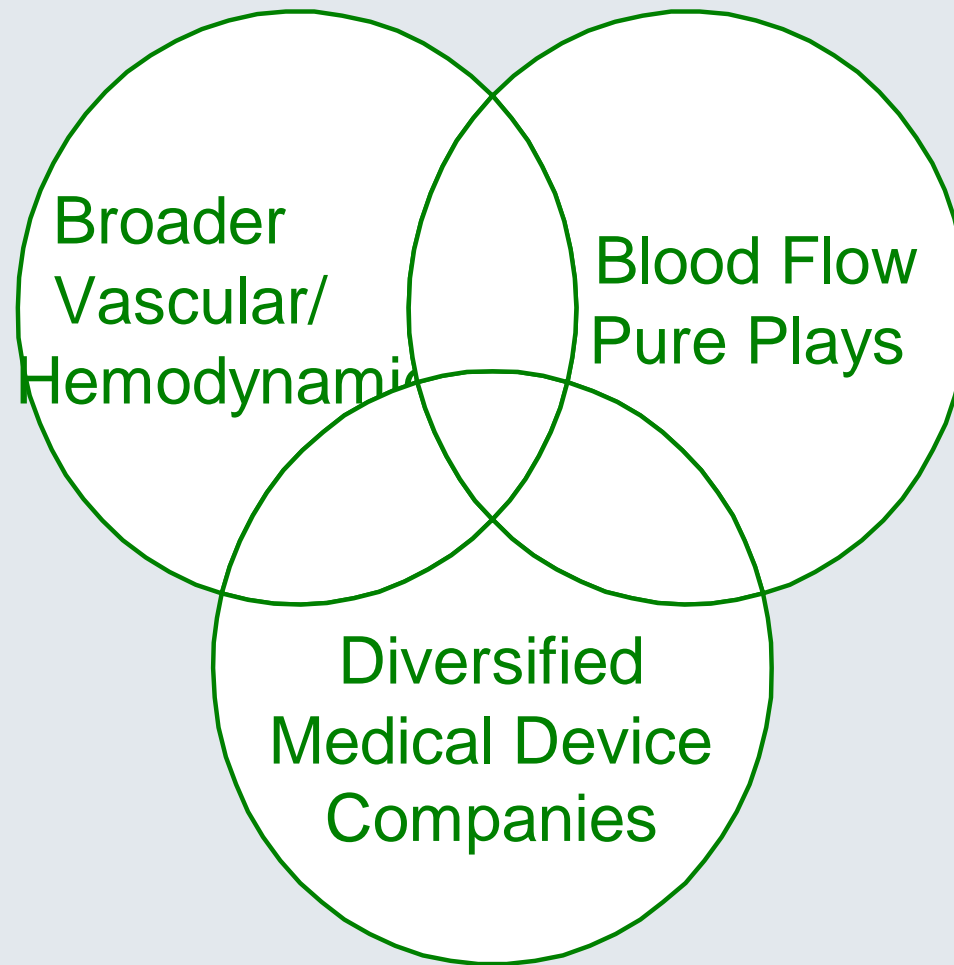
- Main applications: Intra- and post-operative monitoring, diagnosis of peripheral vascular disease, stroke detection, and others.
- There are about 30-35 companies active in this space, some of them blood flow pure-plays, others targeting the broader hemodynamic monitoring/vascular space, and few others being diversified healthcare companies.
- Barring few companies most are privately owned. Even among the publicly owned companies, Huntleigh Diagnostics and Nicolet are relatively small divisions within these corporations.
- Entry barriers are high for start-ups/new entrants, given the complexity of the technology, applications, and selling effort involved.

Growth Drivers

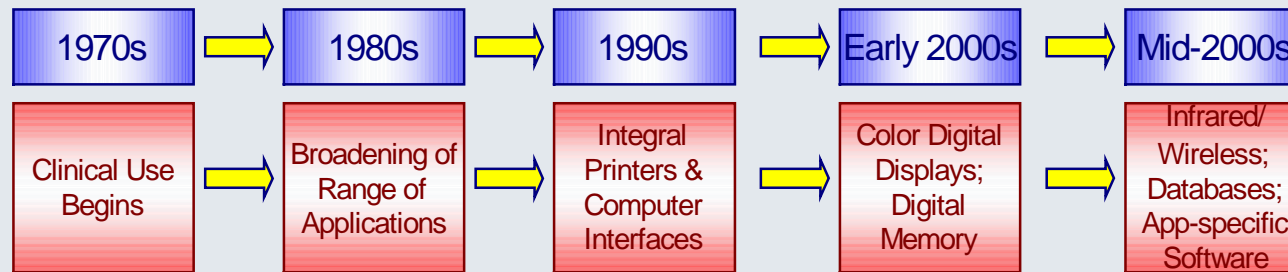
- Demographics and volume growth: Numbers of procedures in the core application areas for blood flow measurement devices are increasing: cardiac surgery (CABG), transplant surgery, post-op monitoring, vascular lab diagnostic procedures, angioplasty, office-based, and emergency evaluations.
- Continuous Quality Improvement (CQI) measures in hospitals, particularly with reference to CABG procedure outcomes.
- Need to avoid re-operations, which are expensive and not reimbursed by the patient's insurer.

- Reduced liability insurance rates for doctors and reduced exposure to lawsuits. There is increasing clinical evidence pointing to post-op perfusion deficiencies and resulting deaths. By documenting vascular patency at the end of surgery, surgeons will have reasonable proof of a surgery that went well.
- Competition for patients among hospitals, and their ability to publish data around best clinical practices at their facility.
- CABG procedures and PVD/PAD testing are two key drivers, in addition to monitoring or testing for cerebral flow (transcranial doppler – TCD)

Competitor Segmentation

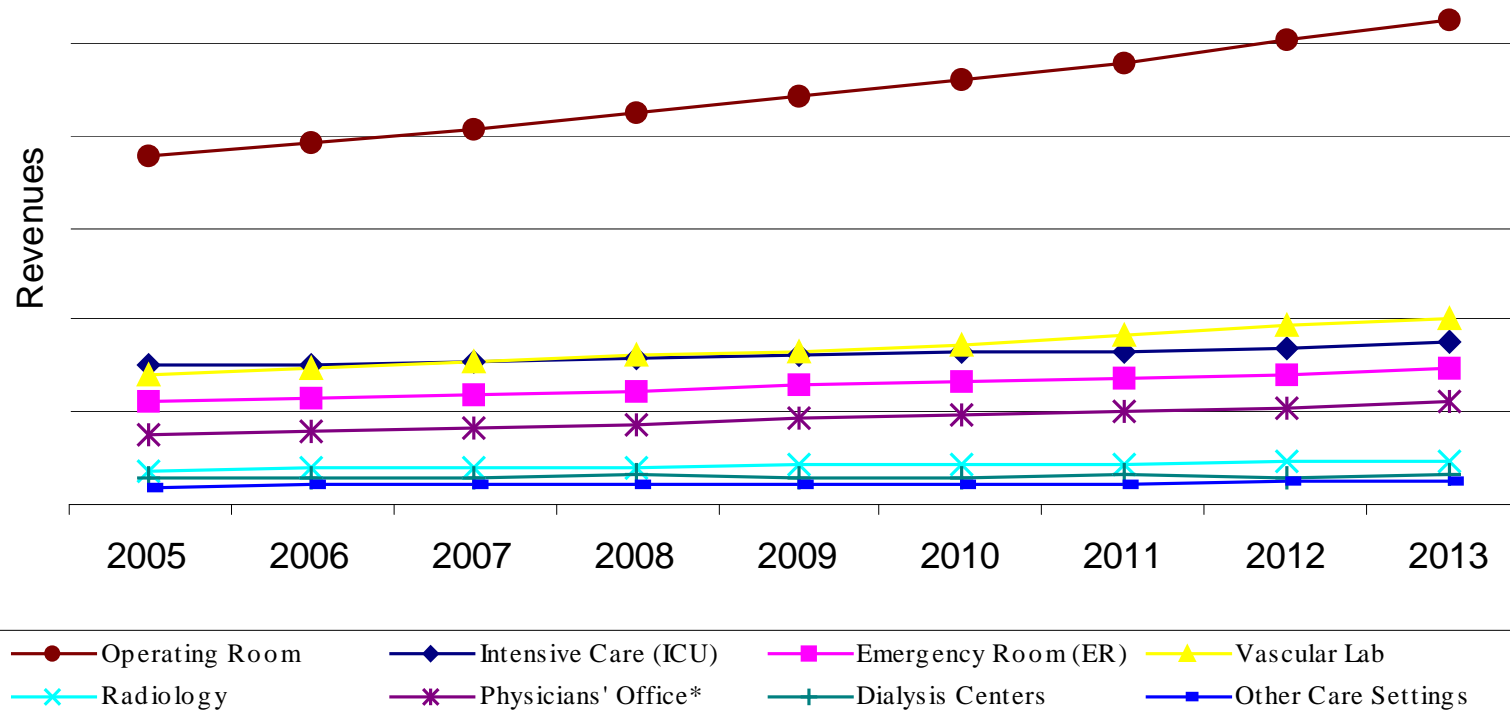


Doppler Segment Evolution



Market By Care Location

Market By Care Location - USA (2005-2013)



Sample Data Table

Blood Flow Measurement Devices Market By Application - USA (2005-2013)

Segment	2005	2006	2007	2008	2009	2010	2011	2012	2013	CAGR
Surgery										
Revenues (\$ Million)										
Revenue Growth										
Post-Op/Intensive Care										
Revenues (\$ Million)										
Revenue Growth										
Emergency Investigations										
Revenues (\$ Million)										
Revenue Growth										
Non-Emergency Investigations										
Revenues (\$ Million)										
Revenue Growth										
Hemodialysis										
Revenues (\$ Million)										
Revenue Growth										
Research										
Revenues (\$ Million)										
Revenue Growth										
Total Market										
Revenues (\$ Million)										
Revenue Growth										

Source: Marketstrat®

Regions Covered	USA, Europe, Japan, Rest of the World
Product/Market Segments	<ul style="list-style-type: none">•Market by Technology•Market by Application•Market by Device Form•Market by Revenue Category•Market by Care Site/Location
Companies Profiled	95+ worldwide
Market Estimates/ Forecasts	Estimates/Forecasts for 2004-2012 in Units &US dollars, separately by Device Type and by Region.
MARKETSTRAT Analytical Framework	Drivers and Restraints; KPPI Grid (Key Product Performance Indicators); Competitive Framework; SRCE Framework; Key Market Parameters (KeyMAP Grid)
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