

MARKETSTRAT®

Applied Market Strategy

Erectile Dysfunction (ED) Treatment Devices Markets Worldwide

A Market Strategy Report

September 2010

ERECTILE DYSFUNCTION (ED) TREATMENT DEVICES MARKET WORLDWIDE**TABLE OF CONTENTS**

SECTION 1 - EXECUTIVE SUMMARY	6
1.1 Key Takeaways	6
1.2. Erectile Dysfunction (ED) Treatment Devices - Key Market Parameters (KeyMAP Grid)	7
1.3. Market Data Segmentation	8
1.4. Market Estimates, Assumptions and Data Reliability	8
1.4.1. Revenue Estimates and Forecasts	8
1.4.2. Market Share Rankings and Global Competitive Position Maps	9
1.5. Erectile Dysfunction (ED) Treatment Devices Ecosystem	10
1.6. Segmentation by Business Focus	11
1.7. Market Overview	11
1.7.1. Market Trends	11
1.7.2. Market Distribution by Type of Device (2009)	13
1.7.3. Market Drivers	13
1.7.4. Market Restraints	14
1.8. Key Players	15
1.8.1. Market Segment Matrix	15
1.8.2. Ranking of Leading Competitors Worldwide	15
1.8.3. Competitive Strategies	16
1.9. Overview of Leaders and Innovators	16
1.9.1. American Medical Systems	16
1.9.2. Andromedical SL	17
1.9.3. Bonro Medical Inc.	17
1.9.4. Coloplast	17
1.9.5. Owen Mumford	17
1.9.6. Pos-T-Vac Medical	18
1.9.7. Timm Medical Technologies Inc.	18
1.10. Total World Market – Revenues and Forecasts for ED Treatment Devices	19
1.11. World Market – Revenues and Forecasts for Inflatable Penile Prosthesis	21
1.12. World Market – Revenues and Forecasts for Malleable Penile Prosthesis	23

1.13. World Market – Revenues and Forecasts for Vacuum Pumps ----- 25

SECTION 2 – PRODUCTS AND MARKETS ----- 26

2.1 Clinical Overview ----- 26

2.2. Epidemiology ----- 28

2.3. Market Segment Analysis – Inflatable Implants ----- 29

2.3.1. Key Product Segment Parameters (KeyProdSeg Grid) ----- 29

2.3.2. Product and Procedure Overview ----- 29

2.3.3. Supplier-Model Matrix for Inflatable Implants ----- 31

2.3.4. Recent Technologies ----- 31

2.3.5. Leading Competitors for Inflatable Implants – Global Market Rank ----- 32

2.3.6. Purchase Considerations ----- 32

2.3.7. World Inflatable Implants Market: Market Forecasts by Country/Region (2009-2017, \$US) ----- 33

2.4. Market Segment Analysis – Malleable Implants ----- 35

2.4.1. Key Product Segment Parameters (KeyProdSeg Grid) ----- 35

2.4.2. Product and Procedure Overview ----- 36

2.4.3. Supplier-Model Matrix for Malleable Implants ----- 36

2.4.4. Recent Technologies ----- 37

2.4.5. Leading Competitors for Malleable Implants – Global Market Rank ----- 37

2.4.6. Global Competitive Position Map – Malleable Implants ----- 37

2.4.7. World Malleable Implants Market: Market Forecasts by Country/Region (2009-2017, \$US) - 38

2.5. Market Segment Analysis – Vacuum Pumps ----- 40

2.5.1. Key Product Segment Parameters (KeyProdSeg Grid) ----- 40

2.5.2. Product and Procedure Overview ----- 40

2.5.3. Supplier-Model Matrix for Vacuum Pumps ----- 42

2.5.4. Leading Competitors for Vacuum Pumps – Global Market Rank ----- 42

2.5.5. Global Competitive Position Map – Vacuum Pumps ----- 43

2.5.6. Purchase Considerations ----- 43

2.5.7. World Vacuum Pumps Market: Market Forecasts by Country/Region (2009-2017, \$US) ----- 44

SECTION 3 – US MARKET ----- 46

3.1. US Market for ED Treatment Devices ----- 46

3.2. US Market for Inflatable Pumps ----- 47

3.3. US Market for Malleable Pumps ----- 48

3.4. US Market for Vacuum Pumps ----- 49

SECTION 4 – EUROPEAN MARKET ----- 50

4.1. European Market for Erectile Dysfunction (ED) Treatment Devices	50
4.2. European Market for Inflatable Penile Pumps	51
4.3. European Market for Malleable Penile Pumps	52
4.4. European Market for Vacuum Pumps	53
SECTION 5 – JAPANESE MARKET	54
5.1. Japanese Market for Erectile Dysfunction (ED) Treatment Devices	54
5.2. Japanese Market for Inflatable Pumps	55
5.3. Japanese Market for Malleable Pumps	56
5.4. Japanese Market for Vacuum Pumps	57
SECTION 6– REST OF THE WORLD (ROW) MARKET	58
6.1. ROW Market for Erectile Dysfunction (ED) Treatment Devices	58
6.2. ROW Market for Inflatable Pumps	59
6.3. ROW Market for Malleable Pumps	60
6.4. ROW Market for Vacuum Pumps	61
SECTION 7 - COMPANY REVIEWS	62
American Medical Systems (AMS)	62
Overview	62
Management Team	62
Product Matrix	62
Financial Summary	63
Andromedical S.L	65
Overview	65
Management Team	66
Augusta Medical Systems LLC	66
Overview	66
Management Team	66
Product Matrix	66
Bard Medical Division	67

Overview-----	67
Management Team-----	67
Bonro Medical, Inc. -----	67
Overview-----	67
Management Team-----	67
Products-----	67
Coloplast -----	68
Overview-----	68
Management Team-----	68
Product Matrix-----	68
Financial Summary-----	69
Encore, Inc. -----	71
Overview-----	71
Management Team-----	71
Product Matrix-----	71
Endocare, Inc. -----	71
Overview-----	71
Product Matrix-----	71
Owen Mumford Ltd -----	72
Overview-----	72
Product Matrix-----	72
Pos-T-Vac Medical -----	73
Overview-----	73
Product-----	73
Promedon -----	73
Overview-----	73
Product Matrix-----	74
Timm Medical Technologies -----	74
Overview-----	74
Product-----	74
SECTION 7 - RESEARCH METHODOLOGY -----	75
7.1. Data Collection - Primary Research-----	75
7.2. Data Collection - Secondary Research-----	75
7.3. Analysis and Interpretation-----	76
7.4. Data Presentation-----	76
7.5. Data Reliability and Limitations-----	76
7.6. Marketstrat® Analytical Framework-----	76

7.7. Industry Trends----- 77
 7.8. Company Reviews ----- 77
 7.9. Project Approach ----- 78

List of Tables

TABLE 1: MARKET RANK OF LEADING COMPETITORS FOR ED TREATMENT DEVICES WORLDWIDE..... 15
 TABLE 2: WORLD - ED TREATMENT DEVICES REVENUE FORECASTS (2009-2017, \$ MILL) 19
 TABLE 3: WORLD - INFLATABLE PENILE PROSTHESES REVENUE FORECASTS (2009-2017, \$ MILL) 21
 TABLE 4: WORLD - MALLEABLE PENILE PROSTHESES REVENUE FORECASTS (2009-2017, \$ MILL) 23
 TABLE 5: WORLD - VACUUM PUMPS REVENUE FORECASTS (2009-2017, \$ MILL)..... 25
 TABLE 6: GLOBAL MARKET RANK OF LEADING COMPETITORS FOR INFLATABLE IMPLANTS 32
 TABLE: 7 WORLD INFLATABLE IMPLANTS REVENUE FORECASTS BY COUNTRY/REGION - 2009-2017 (\$ MILL)
 33
 TABLE 8: GLOBAL MARKET RANK OF LEADING COMPETITORS FOR MALLEABLE IMPLANTS 37
 TABLE 9: WORLD MALLEABLE IMPLANTS REVENUE FORECASTS BY COUNTRY/REGION - 2009-2017 (\$ MILL)
 38
 TABLE 10: WORLD VACUUM PUMPS DEVICES REVENUE FORECASTS BY COUNTRY/REGION - 2009-2017 (\$
 MILL) 44
 TABLE 11: USA - ED TREATMENT DEVICES REVENUE FORECASTS (2009-2017, \$ MILL)..... 46
 TABLE 12: USA - INFLATABLE PUMPS REVENUE FORECASTS (2009-2017, \$ MILL) 47
 TABLE 13: USA - MALLEABLE PUMPS REVENUE FORECASTS (2009-2017, \$ MILL)..... 48
 TABLE 14: USA - VACUUM PUMPS REVENUE FORECASTS (2009-2017, \$ MILL)..... 49

List of Figures

FIGURE 1: MARKET DISTRIBUTION BY TYPE OF DEVICE ----- 13
 FIGURE 2: WORLD - ED TREATMENT DEVICES REVENUE FORECASTS (2009-2017, \$ MILL) ----- 20
 FIGURE 3: WORLD - INFLATABLE PENILE PROSTHESES REVENUE FORECASTS (2009-2017, \$ MILL) ----- 22
 FIGURE 4: WORLD - MALLEABLE PENILE PROSTHESES REVENUE FORECASTS (2009-2017, \$ MILL) ----- 24
 FIGURE 5: WORLD - VACUUM PUMPS REVENUE FORECASTS (2009-2017, \$ MILL) ----- 25
 FIGURE 6: WORLD INFLATABLE IMPLANTS REVENUE FORECASTS BY COUNTRY/REGION - 2009-2017 (\$
 MILL) ----- 34
 FIGURE 7: WORLD MALLEABLE IMPLANTS REVENUE FORECASTS BY COUNTRY/REGION - 2009-2017 (\$
 MILL) ----- 39
 FIGURE 8: WORLD VACUUM PUMPS REVENUE FORECASTS BY COUNTRY/REGION - 2009-2017 (\$ MILL)-- 45
 FIGURE 9: USA - ED TREATMENT DEVICES REVENUE FORECASTS (2009-2017, \$ MILL) ----- 46
 FIGURE 10: USA - INFLATABLE PUMPS REVENUE FORECASTS (2009-2017, \$ MILL) ----- 47
 FIGURE 11: USA - MALLEABLE PUMPS REVENUE FORECASTS (2009-2017, \$ MILL) ----- 48
 FIGURE 12: USA - VACUUM PUMPS REVENUE FORECASTS (2009-2017, \$ MILL) ----- 49