



HOME MEDICAL TESTING DEVICES MARKETS *(SAMPLE COPY, NOT FOR RESALE)*

Trends, Industry Participants, Product Overviews and Market Drivers

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1. Introduction

1.1 Statement of Report

The purpose of this report is to describe the specific segment of the home medical testing devices markets, with particular emphasis on the United States market. The U.S. market for home care products, testing, devices and equipment continues to post steady gains, primarily as a result of: 1) the aging population, 2) a growing trend to out-patient care and the corresponding shift of chronic care patients from hospitals, and 3) extended care facilities to the home. In other areas of the world, the results vary depending on the economies of the country and the health sophistication of the consuming public.

This analysis presents an overview of the home medical testing devices market with the latest information regarding emerging new products, new markets for older products/technologies and industry trends. It will not only quantify but also qualify the home medical testing devices market as an area of research, product development and investment opportunities. Forecasts of the home medical testing devices market and an analysis of products in the worldwide home medical testing devices market will provide a basis for understanding the significance of past developments and future possibilities within this category.

1.2 Objectives of this Report

The principal objectives of this study are to:

- Identify viable technology drivers through a comprehensive look at various platform technologies for the home medical testing devices market.
- Obtain a complete understanding of the important home medical testing devices market targets and their therapeutic value, and understanding these elements from their basic principles to their applications.
- Discover feasible market opportunities via an identification of high-growth applications in different home medical testing devices market areas, with a focus on the biggest and expanding markets for diseases and/or therapies.
- Focus on global home medical testing devices industry development through an in-depth analysis of the major world markets for these modalities, including forecasts for growth.
- Present market figures regarding the current value of the home medical testing devices market, projections and growth rates. These are taken from the most recently available data of the global home medical testing devices industry.
- To examine in depth the use of home medical testing devices development and show specific examples of their use in development and repositioning of therapeutic agents and products.

By purchasing this review, the reader will have:

- An improved understanding of the current state and future of the most important home medical testing devices market segments.
- The latest information on the leading companies engaged in R&D and product development in the home medical testing devices pipeline, including products initially designed, cleared and/or approved for clinical applications, but which are now crossing-over to the home care markets.
- The leading perspective of exciting recent home medical testing devices market developments and revelations and how they will influence selected markets.
- Knowledge of research and investment for home medical testing devices industry.

This report will cover the following categories of home medical testing devices market segments:

- Medical testing devices markets and clinical applications in the home environment.
- Role of home medical testing and device requirements in driving market changes.
- Potential of home medical testing devices market development.
- Barriers to expanded home medical testing and device use.
- Drivers of home medical testing and device use.
- Home medical testing and device development issues.
- Business trends in the industry.
- Important technology trends in home use of medical testing devices.
- Home medical testing- and device-oriented corporate profiles.

Analysis includes the use of charts and graphs measuring product growth and trends within the marketplace. In addition, a discussion of research into various clinical conditions provides the reader with a deeper understanding of the possibilities for future treatment and avenues for possible R&D budgets. Company-specific information, including sales figures, product pipeline status, and R&D trends is provided throughout the report.

This report will provide the user with the latest information on the home medical testing devices market in the U.S. and significant or emerging world markets. It includes information on the products that comprise this industry, descriptions, cautions, and important regulatory issues. There is some general discussion of current issues, subject to additional research findings as such become available.

- Assess the market drivers and bottlenecks, from the perspective of the medical and scientific communities.
- Discuss the potential benefits the home medical testing devices market for various sectors of the medical and scientific community.
- Establish the current total market size and future growth of the home medical testing devices market and analyze the current size and growth of individual segments.
- Discuss profit and business opportunities in the home medical testing devices market segment.
- Provide strategic recommendations for near term business opportunities.
- Assess current commercial uses of the home medical testing devices market.

Examine key and niche players worldwide such as Abbott Laboratories, Apria HealthCare, Baxter Healthcare, Del Mar Reynolds, Gambro AB, Gentiva Health Services, Invacare Corporation, Lincare, Matria Healthcare, Respironics, B. Braun Medical, Fresenius Medical Care, Graham-Field Health Products, Kimberly-Clark Corporation and Sunrise Medical.

This examination will answer the following questions:

- What are the near term business opportunities in the home medical testing devices market?
- What are the current and forecasted sizes of the home medical testing devices market?
- What are the business models currently used by companies in the home medical testing devices market?
- How will manufacturers, researchers, physicians, patients and payers influence the home medical testing devices markets?
- What are the drivers and bottlenecks influencing the home medical testing devices market?
- What are the technologies used in the home medical testing devices market?
- Who holds the proprietary rights to the home medical testing devices market's technology?
- What are current applications of these technologies?
- How will new home medical testing and device technologies change treatment and payment paradigms?
- How will home medical testing and device technologies reduce adverse clinical reactions and decrease total patient care cost?
- How will home medical testing and device technologies reduce healthcare expenditures?

This report contains:

- A comprehensive overview of those categories of home medical testing and devices that are, or will be revolutionizing the treatment of cardiovascular diseases.
- Full descriptions of the technologies involved and how these differ from existing and emerging technologies.
- Analysis of the technological approaches undertaken by the various competitors and industry and end-user response to these products.
- Regulatory issues and legislation affecting use and marketing of products.
- Market forecasts for each category of product through 2013, and profiles of selected competitors in each category are included.

Since this is a dynamic industry, with new study findings published almost daily, the included discussions are subject to additional research findings as such become available.

1.3 Scope of the Report

The emphasis in this analysis is on those companies that are actively developing and marketing home medical testing and device technologies. The reader should consult other TriMark Publications reports for a detailed discussion of the important individual market segments which are related to the home medical testing and devices technologies market such as specific testing and medical device equipment, molecular diagnostic testing, clinical chemistry, cancer testing, infectious disease markers and other exciting new diagnostic methods.

This study reviews the market for home medical testing and devices market. It defines the dollar volume of sales in the U.S. of the market and analyzes the factors that influence the size and the growth of the market segments. The report discusses activity and trends in the home medical testing devices market. The report goes on to discuss in detail the trends that have developed which have stimulated this market.

The review surveys all of the companies known to be marketing, manufacturing or developing home medical testing and devices technologies in the U.S for the selected segments identified. Leading companies are discussed in depth with a section on the history of the company, the product line, business and marketing analysis, and a subjective commentary of the position of the company in its market.

1.4 Methodology

This study is based upon interviews with sales and marketing professionals of companies in the home medical testing devices market. They were queried, some several times, about their companies' products and marketing strategies as well as their overall thoughts about their industry segment. Information was also obtained from interviews with CEOs and vice presidents of some of the companies discussed in the report.

Sources of information for the study were trade association publications and meetings, product brochures, and catalogs and company literature. Where the companies under discussion were publicly held, an examination of the annual reports, 10k filings and financial reports were used as the basis of the data reported. Important data sources include the Health for All Database of the World Health Organization (WHO), data published by the statistical office of the European Communities (Eurostat), as well as various health data from the United Nations (UN) and the Organization for Economic Cooperation and Development (OECD). Where possible and practicable, the most recent data available have been used. Some e-information was obtained from national government institutions, while economic forecasts are based on the latest predictions published by the International Monetary Fund's (IMF) economic analysis unit.

The author of this report is a PhD with decades of experience in science writing and as a medical industry analyst. The senior editor has many years of experience in clinical science, as well as extensive experience in senior-level positions in biotech, pharma and medical service companies. Some of the statistical information was taken from Biotechnology Associates' databases (a global information and consulting company specializing in analysis of biotech and medical information) and from TriMark's private data stores. The information set forth in this study was

obtained from sources that we believe to be reliable, but we do not guarantee the accuracy, adequacy or completeness of any information, omission or for the results obtained by the use of such information.

Primary Sources: TriMark collects information from hundreds of Database Tables and many comprehensive multi-client research projects and Sector Snapshots that we publish annually. We extract relevant data and analytics from TriMark's research of the past three years as part of this data collection. We also extract qualified data feeds from questionnaire responses and primary research responses for this compilation.

Secondary Sources: TriMark uses research publications, journals, magazines, newspapers, newsletters, industry reports, investment research reports, trade and industry association reports, government-affiliated trade releases, and other published information as part of our secondary research materials.

The information is then analyzed and translated by the Industry Research Group into a TriMark study. The Editorial Group reviews the complete package with product and market forecasts, critical industry trends, threats and opportunities, competitive strategies and market share determinations. The report conclusions are verified through intensive interviewing of top-ranking companies in the industry.

TriMark Publications Report Research and Data Acquisition Structure

The general sequence of research and analysis activity prior to the publication of every report includes the following items:

- Completing an extensive secondary research effort on an important market sector, including gathering all relevant information from corporate reporting, publicly available databases, proprietary databases, direct meetings and personal interviews with key personnel.
- Formulating a study outline with the assigned writer, including important items:
 - Market and product segment grouping and evaluating its relative significance.
 - Key competitors' evaluations including its relative positions in the business and other relevant facts to prioritize diligence levels and assist in designing a primary research strategy.
 - End-user research to evaluate analytical significance in market estimation.
 - Supply chain research and analysis to identify any factors affecting the market.
 - New technology platforms and cutting-edge applications.
- Identifying the key technology and market trends that drive or affect these markets. Assessing the regional significance for each product and market segment for proper emphasis of further regional/national primary and secondary research.
- Launching a combination of primary research activities including two levels of questionnaires, executive-direct focused, company-specific and region-specific communications to qualified and experienced senior executives worldwide.
- Completing a confirmatory primary research assessment of the report's findings with the assistance of expert panel partners from the industry being analyzed.

1.5 Executive Summary

This home medical testing devices market report provides a study of this growing industry, consisting primarily of home testing devices, but also including related products and devices. This product category serves a broad cross-section of the U.S. population and, in particular, baby boomers that have become senior citizens and are taking an active role in monitoring their own health.

This high-tech field is becoming a booming consumer product sector. There are devices designed to address numerous specific, usually chronic, health problems. They are designed to be used even while traveling. All these

devices eliminate the need for busy people to make many trips to the doctor. The demand for more and improved devices continues to grow. These points will be addressed in greater detail in this report.

Market Drivers

- Aging population, especially the “baby boom” generation reaching active retirement.
- Acceptance of “self-medication,” “wellness,” and “healthy lifestyle” among individuals and companies for their employees and, with some, their retirees.
- Growing healthcare costs.
- Media publicity has made consumers, primarily in the U.S. market, aware that healthcare in the U.S. lags far behind the rest of the developed countries of the world, while leading the world in costs.
- Paradigm shift in personal health. Americans are taking more responsibility for their personal health, embracing the concept of health maintenance and wellness.
- Dissatisfaction with Western healthcare for the reasons mentioned above, coupled with rising healthcare costs in the U.S.
- Increasing acceptance of alternative healthcare practices, making the medical consuming public more inclined to be personally involved in traditional healthcare, but in the home environment.
- Increased understanding and awareness of diet-disease relationships, with many of these diseases already have a home management component, as discussed later in this report.
- A major factor, the “graying” of many countries.

Market Restraints

- Cost factors where many home medical products are viewed as commodities.
- Limited brand loyalty, re: generic products.
- Fear of technology or of the improper use of home health testing and medical device tools causing improper diagnosis, readings and/or a negating of potential therapeutic benefits.
- Home medical products slow to spread globally.