

Noninvasive Glucose Monitors

Technologies, Devices and Commercialization
Potential

June 2008



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The number of diabetes patients is expected to continue to increase on a global basis

Advances in sensing and signal processing are enabling new and innovative monitor designs

Noninvasive monitors are expected to improve patient compliance and reduce diabetes-related complications

The ability to monitor blood glucose levels on a consistent basis has the potential to improve the quality of life for millions of diabetes patients

Sensing technologies for the new generation of glucose monitors include novel optical, RF, and thermal designs

Greystone Associates is pleased to announce the publication of a new market study. **Noninvasive Glucose Monitors** is a comprehensive analysis of more than a dozen monitoring systems that have the potential to change the way diabetic patients monitor blood glucose levels in the course of their daily treatment.

Published in June (2008), the report has been designed and developed to provide life science company decision makers, enabling technology providers, device designers, and industry strategists with a detailed understanding of the potential and possible impact of noninvasive glucose monitors on diabetes care markets and treatment outcomes. Provider organization business managers, healthcare administrators and investors will also benefit from this publication.

User-Friendly Monitoring for A Daily Routine

For diabetes patients, glucose monitoring is a way of life, a several-times-per-day routine critical to physiological health. But while the traditional finger prick method has been a standard disease management tool for decades, issues of patient compliance and the limitations of current methods in detecting short-term fluctuations in glucose levels have brought a host of companies into the hunt for less invasive and more user-friendly alternatives.

Now the convergence of small-scale electronics and sophisticated biocompatible product designs is giving hope for a better future to millions of diabetes patients worldwide. Noninvasive glucose monitors that can measure glucose levels accurately and reliably have the capability to improve glycemic control and patient wellbeing. By integrating the sensing element, electronics, and a power source in a single package, noninvasive monitors are creating new options for caregivers and their diabetes patients.

Signal processing improvements - include improved signal-to-noise ratios and interference filtering - will continue to be critical to the commercialization prospects of noninvasive monitors. While the potential is substantial, for most participants the road to commercialization will contain numerous speed bumps and delays that will strain capitalization requirements and investor patience. Successful players will be those that realize the value of partnerships and strategic alliances.

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- Profiles of Eleven Market Participants

Market Data

The study presents qualitative and quantitative data and information on key market measures and benchmarks:

- Noninvasive Technology Commercialization Status
- Noninvasive Glucose Monitor Development Status Analysis
- Technology Risk Assessments
- Strategic Positioning Factors
- Industry Structure & Competitive Landscape
- Regulatory Risk Factors
- Commercialization Strategies
- Market Participant Profiles
- Emerging Technologies
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Methodology

Research methodology is based on primary research in the form of in-depth interviews with key market participants, technology developers, distributors, industry experts, and market influencers, a list that includes regulatory officials, industry trade groups, and materials standards organizations.

Primary data is evaluated and normalized against secondary sources including trade journal articles, technical literature, industry publications, company data sheets and published information, and statistical data from government agencies and trade associations.

Forecasts and projections of market demand and future market activity are derived using standard modeling and statistical techniques

Feature Summary

- Analyzes and evaluates noninvasive glucose sensing and monitoring technologies and development-stage products and assesses market potential and commercialization risks and opportunities
- Examines noninvasive glucose monitor design issues and evolving market factors
- Provides detailed status of noninvasive glucose monitors currently in development
- Forecasts the impact of glucose sensing technology and devices on diabetes management markets and projects probable future developments
- Profiles market participants, their technology, product development activity, and business strategies
- Evaluates the impact of economic, technology, and regulatory factors on the commercial potential of noninvasive glucose monitors

Report Format and Availability

This report is available in electronic format. A site license for a single physical location and a global license are also available. Publication is scheduled for June 2008, with availability on or before June 18th.

About Greystone Associates

Greystone Associates is a medical technology consulting firm focused on the areas of medical market strategy, product commercialization, venture development, and market research. We assist medical and healthcare market participants in achieving their business objectives through the creation of detailed development strategies, product commercialization programs, and comprehensive market and technology research and analysis.

Our market research publications are designed, researched and written to provide timely and insightful information and data on focused market segments, with the aim of providing market participants with the essential knowledge to refine and execute their marketing plans and financial targets.

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