

Patient Self-Monitoring
Markets and Opportunities

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associates

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The ability to monitor analytes in blood levels has long been a critical tool in the battle to control the effects of chronic ailments such as diabetes and heart disease

Shifting demographics and managed care initiatives will drive patient self-monitoring out of practitioner offices and into homes.

To be effective, self-monitoring products must be capable of accurately measuring analytes of interest and reporting them to patients in the proper format and context.

Stricter targets driven by new research will reinforce the use of self-testing

Future generation patient self-monitor products will employ advanced sensing, signal processing and sampling methods.

Greystone Associates is pleased to announce the publication of a new market study. **Patient Self-Monitoring: Markets and Opportunities** is a comprehensive evaluation and analysis of the technology, products and participants in this evolving segment of the healthcare industry.

Published in February (2006), the study is designed to provide pharmaceutical company decision makers, drug developers and formulators, drug device designers, and industry strategists with a detailed understanding of the expanding role and influence of user-friendly pen injectors on medical industry strategies and healthcare treatment protocols. Provider organization business managers, healthcare administrators and investors can also benefit from this study.

Demographics & Health Initiatives Create Opportunities

Current efforts to reduce the societal impact of chronic ailments such as diabetes and heart disease are focused on several factors, including the identification of genetic and environmental risk factors, patient education, and improved patient compliance. The ability of patients to monitor their own blood serum levels is deemed to be a critical tool in reducing the pathological effects of poorly controlled disease factors. For conditions other than diabetes, the vast majority of monitoring is now performed in physician offices or similar healthcare settings. But this will change. The convergence of new measurement technologies, patient demographics and managed care cost initiatives is driving patient monitoring for a number of conditions from caregiver facilities and into homes. In the process, patient self-monitoring for cholesterol, INR and hypertension have the potential to transition from a cottage industry into a significant market by the end of the decade.

The key enabler of this significant shift will be technological advances that will provide accurate readings in a format that consumers can understand, clearly indicating when a follow-up visit to a caregiver is needed. Systems that allow patients to share readings with physicians electronically have already been introduced. Ultimately, the success of this self-test market will rely on monitors that can provide accurate values for the various analytes that are associated with health risk, presenting them to the patient in the proper context.

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(abridged)

Executive Summary

Disease Management Market Dynamics

- Patient Monitoring Overview
- Self-Monitoring
 - Key Factors in Patient Compliance
 - Market Drivers
 - Shifting Patient Demographics
- Industry Alignment and Competitive Landscape

Self-Monitoring Technology

- Needle-Stick Tests
 - Dry Chemistry Test Strips
 - Cassettes
 - Meters
- Self-Collected / Mail-in Tests
- Physician/Caregiver Testing
 - Rapid Response
 - CLIA Lab Testing
- Meters
- Single Mode Monitors
- Combination Monitors
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 - Noninvasive Monitors
 - Technologies
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 - Energy-based
 - Thermal
 - Measurement Electronics
 - Calibration
 - Accuracy/Precision
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 - Signal Processing Advances

Monitor Product Design & Patient Issues

- Reliability
- Measurement Frequency
- Patient/User Interface
 - Ease-of-Use
 - Data Collection/Data Display
 - Continuous vs Discrete Monitoring

Self-Monitoring Therapeutic Segments

- Atherosclerosis/Heart Disease (Cholesterol)
 - Measurement Modalities
 - Total Cholesterol
 - Triclycerides
 - Cholesterol Panel/Lipid Profile
 - Segment Demographics

- Diabetes (Glucose)
 - Heart Valve Replacement/Thrombosis
 - Oral Anticoagulation Therapy
 - Prothrombin Time
- Hypertension (Blood Pressure)
 - Oscillometric Measurements
 - Demographic Trends

Self-Monitoring Product Segment Analysis

- Cholesterol Monitors
 - FDA Approved Products
 - Needle-stick
 - Spectrophotometric
 - Products in Development
- Coagulation Monitoring
 - FDA Approved Products
 - Products in Development
- Glucose Monitors
 - FDA Approved Products
 - Needle-stick
 - Alternate Site Testing
 - Product in Development
- Combination Monitors
 - FDA Approved Products
 - Products in Development
- Hypertension
 - Existing Products
 - Emerging Technologies
- Potential/Emerging Self-Monitoring Segments
 - Hemoglobin/Hematocrit

Market Factors

- Clinical Trial Issues
- Managed care/Reimbursement
- Marketing & Distribution
- Sourcing/Private Labeling

Selected Company Profiles

- Abbott Laboratories
- AccuTech LLC
- Agamatrix
- Bayer Diagnostics
- Becton Dickinson
- Early Detect
- Home Access Health Corporation
- Home Diagnostics
- Hypoguard
- LifeScan
- Lifestream Technologies
- Omron Rx
- Polymer Technology Systems
- PreMD
- Raytel Medical
- Roche Diagnostics
- Sein/GenExel

Market Data

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

- Market Data and Forecasts
- Approved Products and Technology
- Industry Structure
- Alliance Activity
- Market Acceptance Criteria
- Test Kit Design Criteria
- Third-party Stakeholders
- Proprietary Technology
- Market Participant Profiles
- Emerging Technologies
- Competitive Risks
- Business Strategies
- Research Activity
- Market Drivers
- Regulatory Factors

Forecasts and projections cover the period from 2006 to 2009.

Methodology

Research methodology is based on primary research in the form of in-depth interviews with key market participants, technology developers, supply chain participants, industry experts, and market influencers, a list that includes regulatory officials, industry trade groups, and 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 self-test monitoring technologies and products, and assesses the market potential for existing and probable future products
- Examines next-generation monitor technologies, design issues and market factors
- Provides market segment data for self-monitoring products
- Forecasts the influence of self-monitoring on the healthcare management market
- Profiles self-monitoring market participants, their product development activity, and strategies
- Evaluates the impact of economic, technology, and regulatory factors on patient self-monitoring products and companies

Report Format and Availability

This report is available in hard copy or electronic format. A site license for a single physical location and a global license are also available. Publication is scheduled for the second half of February, with availability on or before February 28th.

About Greystone Associates

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