

INTRODUCTION .....	XX
STUDY GOAL AND OBJECTIVES .....	XX
REASONS FOR DOING THE STUDY .....	XX
CONTRIBUTION OF THE STUDY AND FOR WHOM .....	XXI
SCOPE AND FORMAT .....	XXI
METHODOLOGY AND INFORMATION SOURCES.....	XXII
ANALYST CREDENTIALS.....	XXII
RELATED BCC, INC. RESEARCH .....	XXIII
BCC ONLINE SERVICES.....	XXIII
DISCLAIMER .....	XXIII
EXECUTIVE SUMMARY .....	XXIV
<i>SUMMARY TABLE GLOBAL MARKET FOR BIOSENSORS AND OTHER</i>	
<i>BIOELECTRONICS, THROUGH 2009 (\$ BILLIONS).....</i>	<i>XXIV</i>
<i>SUMMARY FIGURE GLOBAL MARKET FOR BIOSENSORS AND OTHER</i>	
<i>BIOELECTRONICS, 2003-2009 (\$ BILLIONS).....</i>	<i>XXIV</i>
OVERVIEW .....	1
DEFINITIONS .....	1
BIOSENSORS .....	1
BIOELECTRONICS.....	1
BRIEF HISTORY OF BIOSENSORS AND BIOELECTRONICS .....	2
ADVANTAGES OF BIOSENSORS AND BIOELECTRONICS.....	3
APPLICATIONS OF BIOSENSORS AND BIOELECTRONICS.....	4
TABLE 1 <i>BIOSENSOR AND OTHER BIOELECTRONICS APPLICATION AREAS</i> .....	4
BIOMEDICAL AND LIFE SCIENCES .....	5
TABLE 2 <i>BIOMEDICAL AND LIFE SCIENCES APPLICATIONS OF BIOSENSORS</i> .....	5
Self-Monitoring .....	6
TABLE 3 <i>MAJOR MEDICAL SELF-MONITORING APPLICATIONS OF</i>	
<i>BIOSENSORS</i> .....	6
Glucose Testing.....	6
Lactic Acid and Other Tests .....	7
Point of Care (POC) Diagnostics .....	7
TABLE 4 <i>POC BIOSENSOR APPLICATIONS</i> .....	7
TABLE 4 (CONTINUED).....	8
Continuous Medical Monitoring .....	9
Drug Delivery .....	9
Drug Development.....	10
Life Sciences Research .....	10
TABLE 5 <i>LIFE SCIENCES RESEARCH APPLICATIONS OF BIOSENSORS</i> .....	11
Proteomics .....	11
Genomics .....	12
Microbiology .....	13
Toxicology .....	13
Oncology .....	13
Other Medical Research Applications.....	14

Veterinary Medicine .....	14
<i>TABLE 6 BIOSENSOR APPLICATIONS IN VETERINARY MEDICINE</i> .....	14
FOOD PRODUCTION .....	15
<i>TABLE 7 FOOD PRODUCTION APPLICATIONS OF BIOSENSORS</i> .....	15
Measuring Ripeness .....	15
Contaminant/Pathogen Detection.....	15
Process/Quality Control.....	16
Detection of Genetically Modified Organisms in Food.....	16
MILITARY/HOMELAND SECURITY .....	17
Military Applications.....	17
Homeland Security .....	18
<i>TABLE 8 HOMELAND SECURITY ADVANCED RESEARCH PROJECTS AGENCY</i> <i>CURRENT/RECENT BIOSENSOR PROJECTS</i> .....	18
FORENSICS .....	19
DNA Identification .....	19
ENVIRONMENTAL MONITORING AND REMEDIATION.....	19
Environmental monitoring and Remediation (Continued).....	20
COMPUTING .....	21
<i>TABLE 9 BIOCOMPUTING APPLICATIONS</i> .....	21
Data Processing .....	21
Molecular Memory.....	22
ENERGY.....	23
OTHER APPLICATIONS .....	23
Imaging .....	23
DEVICE TYPES.....	23
BIOSENSORS .....	24
<i>TABLE 10 COMMON BIOMOLECULE/TRANSDUCER COMBINATIONS</i> .....	25
Enzyme Biosensors.....	25
Description .....	25
Applications.....	25
<i>TABLE 11 ENZYME BIOSENSORS BY TARGET ANALYTE</i> .....	26
Aspartame .....	26
Choline .....	27
Creatinine .....	27
Ethanol.....	27
Formaldehyde.....	27
Glucose .....	28
Glutamine .....	28
Glycerol .....	28
Hypoxanthine .....	29
Lactic Acid Monitoring .....	29
Nitrite.....	29
Penicillin .....	30
Phenol .....	30
Urea.....	30
Technologies.....	30

<i>TABLE 12 GLUCOSE ENZYME BIOSENSOR TECHNOLOGIES</i> .....	31
Enzyme/Electrochemical Sensing.....	31
<i>FIGURE 1 GLUCOSE ENZYME/ELECTROCHEMICAL BIOSENSOR SCHEMATIC</i> <i>DIAGRAM</i> .....	32
Enzyme/Piezoelectric Sensing.....	33
Enzyme/Optical Sensing.....	33
Patent Analysis .....	34
Enzyme Biosensors .....	34
<i>FIGURE 2 ENZYME BIOSENSOR PATENTS BY TARGET SUBSTANCE, SINCE</i> <i>1976 (%)</i> .....	34
<i>FIGURE 2 (CONTINUED)</i> .....	35
<i>FIGURE 3 ENZYME BIOSENSOR PATENT APPLICATIONS BY TARGET</i> <i>SUBSTANCE, SINCE 1976 (%)</i> .....	35
<i>FIGURE 3 (CONTINUED)</i> .....	36
<i>TABLE 13 MAJOR ENZYME BIOSENSOR PATENT AND PATENT APPLICATION</i> <i>HOLDERS, SINCE 1976</i> .....	36
<i>FIGURE 4 MAJOR ENZYME BIOSENSOR PATENT AND PATENT APPLICATION</i> <i>HOLDERS, PERCENT SHARE, SINCE 1976 (%)</i> .....	37
Glucose Biosensors.....	37
<i>FIGURE 5 GLUCOSE BIOSENSOR PATENT TECHNOLOGY SHARES, SINCE 1976</i> <i>(%)</i> .....	38
<i>FIGURE 6 GLUCOSE BIOSENSOR PATENT APPLICATION TECHNOLOGY</i> <i>SHARES, SINCE 1976 (%)</i> .....	39
<i>FIGURE 7 GLUCOSE BIOSENSOR PATENT HOLDERS, SINCE 1976 (%)</i> .....	40
<i>FIGURE 8 GLUCOSE BIOSENSOR PATENT APPLICATIONS BY APPLICANT,</i> <i>SINCE 1976 (%)</i> .....	41
Lactate Biosensor Patents.....	41
<i>FIGURE 9 LACTATE BIOSENSOR PATENT HOLDERS, SINCE 1976 (%)</i> .....	42
<i>FIGURE 10 LACTATE BIOSENSOR PATENTS BY TYPE OF SENSOR, SINCE 1976</i> <i>(%)</i> .....	43
Enzyme Biosensor Manufacturers .....	44
<i>TABLE 14 GLUCOSE BIOSENSOR MANUFACTURERS</i> .....	44
<i>TABLE 14 (CONTINUED)</i> .....	45
<i>FIGURE 11 GLUCOSE BIOSENSOR MARKET SHARES, 2003</i> .....	45
<i>FIGURE 11 (CONTINUED)</i> .....	46
Affinity Biosensors .....	47
Antibody and Other Protein Biosensors .....	47
Description.....	47
<i>FIGURE 12 ANTIBODY BIOSENSOR PRINCIPLES</i> .....	48
Applications .....	48
Medical Research.....	49
Clinical Medicine .....	49
<i>TABLE 15 CLINICAL APPLICATIONS OF PROTEIN MICROARRAYS</i> .....	49
Oncology .....	49
Drug Discovery.....	50
Food Processing .....	50
Environmental Monitoring .....	50
<i>TABLE 16 ANTIBODY BIOSENSORS BY TARGET ANTIGEN</i> .....	51
Forensics.....	51

Technologies .....	51
Single-Site-Biosensors vs. Microarrays .....	52
Electrochemical Transducers .....	52
Piezoelectric Transducers .....	53
Optical Transducers .....	53
Magnetic Transducers.....	53
Patent Analysis .....	54
TABLE 17 SINGLE SAMPLE AND MULTIARRAY ANTIBODY BIOSENSOR PATENTS AND PATENT APPLICATIONS, SINCE 1976.....	54
FIGURE 13 ANTIBODY BIOSENSOR PATENT AND PATENT APPLICATIONS, SINGLE SAMPLE VS. MULTIARRAY SHARES, SINCE 1976 (%).....	55
FIGURE 14 ANTIBODY BIOSENSOR PATENT AND PATENT APPLICATIONS TECHNOLOGY SHARES, SINCE 1976 (%).....	55
TABLE 18 ANTIBODY BIOSENSOR PATENTS AND PATENT APPLICATION BY TYPE OF TECHNOLOGY, SINCE 1976.....	56
FIGURE 15 OPTICAL ANTIBODY BIOSENSOR PATENT AND PATENT APPLICATIONS TECHNOLOGY SHARES, SINCE 1976 (%).....	56
TABLE 19 OPTICAL ANTIBODY BIOSENSOR PATENTS AND PATENT APPLICATION BY TYPE OF TECHNOLOGY, SINCE 1976 .....	57
FIGURE 16 ANTIBODY BIOSENSOR PATENT AND PATENT APPLICATIONS, SHARES BY TYPE OF PATENT HOLDER, SINCE 1976 (%).....	57
TABLE 20 ANTIBODY BIOSENSOR PATENTS AND PATENT APPLICATION HOLDERS, SINCE 1976.....	58
Manufacturers.....	58
TABLE 21 COMMERCIAL SUPPLIERS OF ANTIBODY BIOSENSOR SYSTEMS AND SUPPLIES.....	58
FIGURE 17 PROTEIN BIOSENSOR MARKET SHARES, 2003 (%).....	59
DNA Biosensors .....	59
Description .....	59
Applications.....	60
Genomics.....	60
Diagnosis of Cancer and Other Diseases .....	61
Drug Discovery .....	62
Food Quality Assurance .....	63
Public Health.....	63
Military/Homeland Defense .....	64
Forensics .....	64
Technologies .....	65
Microarrays vs. Single-Site Sensors.....	66
Optical Transducers.....	67
Label-Using Technologies .....	67
Label-Free Optical Technologies .....	68
Radioactive Transducers .....	69
Electrochemical Transducers.....	69
Electrochemical ... (Continued).....	70
Piezoelectric .....	71
Magnetic .....	72
Patents .....	72

TABLE 22 SINGLE SAMPLE AND MULTIARRAY DNA BIOSENSOR PATENTS AND PATENT APPLICATIONS, SINCE 1976 .....	73
FIGURE 18 DNA BIOSENSOR PATENT AND PATENT APPLICATION SHARES FOR SINGLE SAMPLE VS. MICROARRAY, SINCE 1976 (%).....	73
TABLE 23 DNA BIOSENSOR PATENTS AND PATENT APPLICATION BY TYPE OF TECHNOLOGY, SINCE 1976.....	74
FIGURE 19 DNA PATENT AND PATENT APPLICATIONS TECHNOLOGY SHARES, SINCE 1976 (%) .....	74
TABLE 24 OPTICAL DNA BIOSENSOR PATENTS AND PATENT APPLICATION BY TYPE OF TECHNOLOGY, SINCE 1976.....	75
FIGURE 20 OPTICAL DNA BIOSENSOR PATENT AND PATENT APPLICATIONS TECHNOLOGY SHARES, SINCE 1976 (%).....	75
TABLE 25 DNA BIOSENSOR PATENTS HOLDERS, SINCE 1976.....	76
FIGURE 21 DNA BIOSENSOR PATENT SHARES BY TYPE OF PATENT HOLDER, SINCE 1976 (%) .....	76
TABLE 26 PARTIAL LIST OF DNA BIOSENSOR PATENT APPLICANTS, SINCE 1976.....	77
Manufacturers.....	77
TABLE 27 DNA BIOSENSOR MANUFACTURERS .....	77
TABLE 27 (CONTINUED).....	78
FIGURE 22 DNA MICROARRAY MARKET SHARES, 2003 (%).....	78
FIGURE 22 (CONTINUED) .....	79
Tissue-Based Biosensors .....	79
Description .....	79
Applications.....	79
Technologies .....	80
TABLE 28 MAJOR TECHNOLOGICAL CHALLENGES IN DEVELOPMENT OF TISSUE-BASED SENSORS AND POSSIBLE SOLUTIONS.....	80
TABLE 28 (CONTINUED).....	81
Patents .....	81
TABLE 29 TISSUE-BASED BIOSENSOR PATENTS AND PATENT APPLICATIONS.....	81
TABLE 29 (CONTINUED).....	82
Manufacturers.....	82
TABLE 30 COMPANIES WITH TISSUE BIOSENSOR R&D ACTIVITES.....	82
Microorganism-Based Biosensors .....	83
Description .....	83
Applications.....	83
Technologies .....	83
Microbial Respiration .....	83
Biological Oxygen Demand .....	84
Genetically Engineered Organisms.....	84
Patents .....	85
TABLE 31 MICROORGANISM-BASED BIOSENSOR PATENTS AND PATENT APPLICATIONS .....	85
TABLE 31 (CONTINUED).....	86
Manufacturers.....	86
OTHER BIOELECTRONIC DEVICES.....	86
Biocomputing Devices .....	87
DNA Computers.....	87

	Description.....	87
	Applications .....	88
	Technology .....	89
	DNA “Test Tube” Computer .....	89
	DNA Logic Gates .....	89
	DNA Microchips.....	90
	DNA-Based Nanocomputers.....	90
	Patents .....	90
	Manufacturers.....	91
	Protein Memory .....	91
	Description.....	91
	Applications .....	91
	Technology .....	92
	Patents .....	93
<i>TABLE 32 BACTERORHODOPSIN MEMORY PATENTS AND PATENT</i>		
<i>APPLICATIONS .....</i>		<i>93</i>
	Manufacturers.....	93
<i>TABLE 33 BIORHODOPSIN PRODUCERS .....</i>		<i>94</i>
	Energy.....	94
	Biofuel Cells .....	94
	Description.....	94
	Applications .....	95
	Technologies .....	95
	Microbial-Based Fuel Cells .....	95
	Discrete Microbial Bioreactors	
	Producing Hydrogen for	
	Conventional Fuel Cells .....	96
	Integrated Microbial Bioreactors in the	
	Anodic Compartment of Fuel Cells .....	96
	Microbial-Based Fuel Cells with	
	Artificial Electron Relays .....	96
	Enzymatic Biofuel Cells .....	96
	Anodes Based on Enzyme-Catalyzed	
	Oxidation Reactions.....	97
	Cathodes Based on Enzyme-Catalyzed	
	Reduction Reactions.....	97
	Layered Enzyme Electrodes .....	97
	Ethanol-Based Biofuel Cell.....	98
	Patents .....	98
<i>TABLE 34 BIOFUEL CELL PATENTS AND PATENT APPLICATION BY TYPE OF</i>		
<i>TECHNOLOGY, SINCE 1976.....</i>		<i>99</i>
<i>FIGURE 23 BIOFUEL CELL PATENT AND PATENT APPLICATIONS</i>		
<i>TECHNOLOGY SHARES, SINCE 1976 (%).....</i>		<i>99</i>
	Manufacturers.....	99
	Bio-Solar Cells.....	100
	Description.....	100

Technology .....	100
Applications .....	101
Patents .....	101
Manufacturers .....	101
<b>BIOSENSOR AND BIOELECTRONICS MARKET</b> .....	<b>102</b>
<b>SUMMARY</b> .....	<b>102</b>
<i>TABLE 35 GLOBAL SALES OF BIOSENSORS AND OTHER BIOELECTRONICS, THROUGH 2009 (\$ BILLIONS)</i> .....	<i>102</i>
<i>FIGURE 24 GLOBAL MARKET FOR BIOSENSORS AND OTHER BIOELECTRONICS, 2003-2009 (\$ BILLIONS)</i> .....	<i>102</i>
<b>DETAILED MARKET ESTIMATES AND PROJECTIONS</b> .....	<b>103</b>
<b>MARKET BY TYPE OF DEVICE</b> .....	<b>103</b>
Biosensors .....	103
<i>FIGURE 25 SHARE OF MARKETS SEGMENTS IN THE GLOBAL BIOSENSOR MARKET, 2003 AND 2009 (%)</i> .....	<i>104</i>
<i>TABLE 36 GLOBAL MARKET FOR BIOSENSORS BY TYPE OF TECHNOLOGY, THROUGH 2009 (\$ BILLIONS)</i> .....	<i>105</i>
Catalytic Biosensors .....	105
Historical Sales .....	105
<i>FIGURE 26 CATALYTIC BIOSENSOR SUBSEGMENTS, 2003 (PERCENT OF GLOBAL CATALYTIC BIOSENSOR SALES) (%)</i> .....	<i>106</i>
Market Drivers .....	106
Glucose Self-Testing Kits .....	107
At-Risk Populations .....	107
<i>TABLE 37 INCIDENCE OF DIABETES AMONG DIFFERENT U.S. AGE GROUPS</i> .....	<i>107</i>
<i>TABLE 38 TRENDS IN U.S. POPULATION OVER 45 YEAR OF AGES, THROUGH 2009 (MILLIONS)</i> .....	<i>108</i>
Incidence of Diabetes .....	108
<i>TABLE 39 PROJECTED GROWTH IN POPULATION WITH DIABETES, 2000-2025</i> .....	<i>108</i>
New Products and Testing Technologies .....	108
New Products and ... (Continued) .....	109
Point of Care/Critical Care Monitoring Devices .....	110
<i>TABLE 40 TRENDS IN SALES OF ALL TYPES OF CRITICAL CARE PATIENT MONITORING DEVICES IN THE U.S., THROUGH 2009 (\$ MILLIONS)</i> .....	<i>110</i>
Projected Sales .....	110
<i>TABLE 41 GLOBAL SALES OF CATALYTIC BIOSENSORS BY TYPE, THROUGH 2009</i> .....	<i>110</i>
Glucose Biosensors .....	111
<i>FIGURE 27 GLOBAL GLUCOSE BIOSENSOR SALES BY TECHNOLOGY TYPE, 2009 (%)</i> .....	<i>111</i>
<i>TABLE 42 GLOBAL SALES OF GLUCOSE BIOSENSORS, THROUGH 2009 (\$ BILLIONS)</i> .....	<i>112</i>
<i>FIGURE 28 GLOBAL MARKET FOR IMPLANTABLE GLUCOSE SENSOR SALES BY TECHNOLOGY TYPE, 2009 (%)</i> .....	<i>113</i>
Other Catalytic Biosensors .....	113
Antibody and Other Protein Biosensors .....	114

Historical Sales .....	114
<i>FIGURE 29 PROTEIN BIOSENSOR SUBSEGMENTS, 2003 (PERCENT OF GLOBAL PROTEIN BIOSENSOR SALES) (%).....</i>	<i>114</i>
<i>FIGURE 30 SALES OF PROTEIN BIOSENSORS BY APPLICATION, 2003 (PERCENT OF GLOBAL PROTEIN BIOSENSOR SALES).....</i>	<i>115</i>
<i>FIGURE 31 SALES OF PROTEIN BIOSENSORS BY TRANSDUCER TECHNOLOGY, 2003 (PERCENT OF GLOBAL PROTEIN BIOSENSOR SALES).....</i>	<i>116</i>
Market Drivers.....	116
Proteomics-Related Equipment	
Expenditures .....	116
Wastewater Treatment Market.....	117
<i>TABLE 43 GLOBAL SALES OF ADVANCED WASTEWATER TREATMENT TECHNOLOGIES, THROUGH 2009 (\$ BILLIONS).....</i>	<i>117</i>
<i>FIGURE 32 TRENDS IN GLOBAL ADVANCED WASTEWATER TREATMENT TECHNOLOGIES, 2003-2009 (\$ BILLIONS).....</i>	<i>118</i>
Food Quality Testing Equipment	
Expenditures .....	118
<i>TABLE 44 U.S. SALES OF FOOD TESTING EQUIPMENT, THROUGH 2009 (\$ BILLIONS).....</i>	<i>119</i>
<i>FIGURE 33 TRENDS IN U.S. MARKET FOR FOOD TESTING EQUIPMENT, 2003-2009 (\$ BILLIONS).....</i>	<i>119</i>
Projected Sales .....	120
<i>TABLE 45 GLOBAL SALES OF ANTIBODY-BASED BIOSENSORS BY TYPE, THROUGH 2009 (\$ BILLIONS).....</i>	<i>120</i>
DNA Biosensors .....	120
Historical Sales .....	120
<i>FIGURE 34 SALES OF DNA BIOSENSORS BY TRANSDUCER TECHNOLOGY, 2003 (PERCENT OF GLOBAL DNA BIOSENSOR SALES).....</i>	<i>121</i>
<i>FIGURE 35 DNA BIOSENSORS BY APPLICATION, 2003 (PERCENT OF GLOBAL DNA BIOSENSOR SALES) (%).....</i>	<i>122</i>
Market Drivers.....	122
Genomics-Related Product	
Expenditures .....	123
<i>TABLE 46 GLOBAL SALES OF GENOMIC-BASED PRODUCTS AND SERVICES, THROUGH 2009 (\$ BILLIONS).....</i>	<i>123</i>
<i>FIGURE 36 TRENDS IN GLOBAL MARKET FOR GENOMIC-BASED PRODUCTS AND SERVICES, 2003-2009 (\$ BILLIONS).....</i>	<i>124</i>
Forensic Testing Market.....	124
<i>TABLE 47 U.S. SALES OF FORENSIC TESTING EQUIPMENT, THROUGH 2009 (\$ BILLIONS).....</i>	<i>125</i>
<i>FIGURE 37 TRENDS IN U.S. MARKET FOR FORENSIC TESTING EQUIPMENT, 2003-2009 (\$ BILLIONS).....</i>	<i>125</i>
Wastewater Treatment Market.....	125
Food Quality Testing Equipment	
Expenditures .....	126
Projected Sales .....	126
<i>TABLE 48 GLOBAL SALES OF DNA-BASED BIOSENSORS BY APPLICATION, THROUGH 2009 (\$ BILLIONS).....</i>	<i>126</i>
Microorganism-Based Biosensors .....	127



Historical Sales .....	127
Market Drivers.....	127
<i>TABLE 49 GLOBAL SALES OF ADVANCED POTABLE WATER TREATMENT TECHNOLOGIES, THROUGH 2009 (\$ BILLIONS)</i> .....	128
<i>FIGURE 38 TRENDS IN GLOBAL MARKET FOR ADVANCED POTABLE WATER TREATMENT TECHNOLOGIES, 2003-2009 (\$ BILLIONS)</i> .....	128
Projected Sales .....	129
<i>TABLE 50 GLOBAL SALES OF MICROORGANISM-BASED BIOSENSORS, THROUGH 2009 (\$ BILLIONS)</i> .....	129
Tissue-Based Biosensors .....	129
Bioelectronics .....	129
<i>TABLE 51 GLOBAL MARKET FOR OTHER BIOELECTRONIC DEVICES BY TYPE, THROUGH 2009 (\$ BILLIONS)</i> .....	130
Protein Memory .....	130
Historical Sales .....	130
Market Drivers.....	130
Market for High Density/High Access Speed Data Storage.....	131
<i>TABLE 52 GLOBAL ULTRAHIGH-DENSITY OPTICAL MEMORY SALES, 2003-2009 (\$ BILLIONS)</i> .....	131
<i>FIGURE 39 TRENDS IN SALES OF ULTRAHIGH-DENSITY OPTICAL MEMORY DEVICES, 2003-2009 (\$ BILLIONS)</i> .....	132
Competing Data Storage Technologies.....	132
Projected Market.....	132
<i>TABLE 53 GLOBAL MARKET FOR PROTEIN MEMORY DEVICE SALES, THROUGH 2009 (\$ BILLIONS)</i> .....	133
Biofuel Cells .....	134
Historical Sales .....	134
Market Drivers.....	134
Projected Sales .....	134
<i>TABLE 54 GLOBAL SALES OF BIOFUEL CELLS, THROUGH 2009 (\$ BILLIONS)</i> .....	135
Bio-Solar Cells.....	135
Historical Sales .....	135
Market Drivers.....	135
<i>TABLE 55 GLOBAL PHOTOVOLTAIC MATERIAL SALES, THROUGH 2009 (\$ BILLIONS)</i> .....	135
<i>FIGURE 40 GLOBAL SALES OF PHOTOVOLTAIC MATERIALS, 2003-2009 (\$ BILLIONS)</i> .....	136
Projected Sales .....	136
<i>TABLE 56 GLOBAL BIO-SOLAR CELL SALES, THROUGH 2009 (\$ BILLIONS)</i> .....	136
MARKET BY APPLICATION AREA .....	137
<i>FIGURE 41 GLOBAL BIOSENSOR AND BIOELECTRONICS APPLICATION AREA PERCENTAGE SHARES, 2003 AND 2009</i> .....	137
<i>TABLE 57 GLOBAL BIOSENSOR AND BIOELECTRONICS SALES BY APPLICATION AREA, 2003 AND 2009 (\$ MILLIONS)</i> .....	138
LONG-TERM MARKET OUTLOOK FOR BIOSENSORS AND OTHER BIOELECTRONICS .....	139
LONG-TERM MARKET OUTLOOK...(CONTINUED) .....	140

COMPANY PROFILES .....	141
ABAXIS, INC. ....	141
<i>TABLE 58 ABAXIS, INC. SELECTED FINANCIAL DATA, 2000-2002</i> .....	141
ABBOTT LABORATORIES, INC.....	142
<i>TABLE 59 ABBOTT LABORATORIES, INC. SALES OF DIAGNOSTIC PRODUCTS,</i> <i>2000-2002</i> .....	142
ABMETRIX, INC. ....	143
ACLARA BIOSCIENCES, INC. ....	143
<i>TABLE 60 ACLARA LIFE SCIENCES SELECTED FINANCIAL DATA, 2001-2003 (\$</i> <i>MILLIONS)</i> .....	144
AFFYMETRIX, INC.....	144
<i>TABLE 61 AFFYMETRIX INC. SELECTED FINANCIAL DATA, 2001-2003 (\$</i> <i>MILLIONS)</i> .....	144
AGILENT TECHNOLOGIES .....	145
AMERSHAM BIOSCIENCES, INC. ....	145
APPLIED BIOSYSTEMS GROUP .....	146
AXON INSTRUMENTS/MOLECULAR DEVICES CORP. ....	146
BAYER DIAGNOSTICS .....	146
BECKMAN COULTER INC.....	147
<i>TABLE 62 BECKMAN COULTER, INC. SELECTED FINANCIAL DATA, 2000-2002</i> .....	147
BECTON DICKINSON & CO. ....	148
<i>TABLE 63 BECTON DICKINSON &amp; CO. CLINICAL LABORATORY SOLUTIONS</i> <i>SEGMENT REVENUES, 2000-2002 (\$ MILLIONS)</i> .....	148
BIACORE INTERNATIONAL SA.....	148
BIOFOLD INC. ....	149
CALIPER LIFE SCIENCES INC. ....	149
<i>TABLE 64 CALIPER LIFE SCIENCES INC. SELECTED FINANCIAL DATA, 2001-</i> <i>2003 (\$ MILLIONS)</i> .....	150
CAMBRIDGE LIFE SCIENCES LTD.....	150
CEPHEID THERAPEUTICS .....	150
CIPHERGEN, INC.....	151
COMBIMATRIX CORP. ....	151
CYGNUS, INC.....	152
<i>TABLE 65 CYGNUS INC. SELECTED FINANCIAL DATA, 2001-2003 (\$ MILLIONS)</i> .....	152
DADE BEHRING INC.....	153
<i>TABLE 66 DADE BEHRING SELECTED FINANCIAL DATA, 2000-2002 (\$</i> <i>MILLIONS)</i> .....	153
DUPONT BIOSENSOR MATERIALS .....	154
EDENSPACE SYSTEMS CORP. ....	154
ENZO LIFE SCIENCES .....	154
EUROGENTEC.....	155
FEBIT AG.....	155
FLUIDIGM CORP.....	155
GENEOHM SCIENCES, INC. ....	156
GENETIX LIMITED .....	156
GENISPHERE INC. ....	156

GESELLSCHAFT FUR ENTWICKLUNG UND HERSTELLUNG BIOELEKTROCHEMISCHER SENSOREN MBH .....	156
HOME DIAGNOSTICS INC.....	157
HYPROMATRIX INC. ....	157
IBIS THERAPEUTICS .....	157
INFRAMAT CORP.....	158
INTEGRATED NANO-TECHNOLOGIES, LLC .....	158
INVITROGEN CORP.....	159
LIFESCAN, INC. ....	159
LIFEPOINT INC.....	159
M-BIOTECH, INC.....	160
MEDTRONIC MINIMED .....	160
MERCK BIOSCIENCES .....	161
MICRONICS, INC. ....	161
MOTOROLA, INC.....	161
MUNICH INNOVATIVE BIOMATERIALS GMBH .....	162
NANOGEN, INC.....	162
NIMBLEGEN SYSTEMS, INC. ....	163
ORCHID BIOSCIENCES, INC. ....	163
<i>TABLE 67 ORCHID BIOSCIENCES INC. SELECTED FINANCIAL DATA, 2001-2003</i> (\$ MILLIONS).....	163
PARATEC NEW TECHNOLOGIES LTD.....	164
PERKINELMER, INC. ....	164
POWERZYME, INC.....	164
QUESTSTAR MEDICAL, INC. ....	165
ROCHE DIAGNOSTICS.....	165
<i>TABLE 68 ROCHE DIAGNOSTICS SALES BY BUSINESS SEGMENT.....</i>	165
SEAHAWK BIOSYSTEMS INC.....	166
SEQUENOM INC. ....	166
SIGMA-ALDRICH CORP. ....	167
STRATEGIC DIAGNOSTICS, INC.....	167
TELECHEM INTERNATIONAL/ARRAYIT DIVISION .....	167
TOSHIBA CORP. ....	168
VYSIS, INC. ....	168
XANTEC BIOANALYTICS GMBH.....	168
XENOPORE CORP.....	169
XEOTRON CORPORATION .....	169
YSI, INC .....	169
ZYOMYX, INC.....	169