

CHAPTER ONE: INTRODUCTION .....	1
REASONS FOR DOING THE STUDY .....	1
STUDY GOALS AND OBJECTIVES .....	1
SCOPE OF REPORT .....	2
METHODOLOGIES AND INFORMATION SOURCES .....	3
ANALYST CREDENTIALS .....	3
RELATED BCC REPORTS .....	3
BCC ONLINE SERVICES .....	4
DISCLAIMER .....	4
CHAPTER TWO: SUMMARY .....	5
SUMMARY .....	5
<i>SUMMARY TABLE PROJECTED GLOBAL MARKET FOR TRANSPLANTATION PRODUCTS AND DEVICES, THROUGH 2015 (\$ MILLIONS)</i> .....	6
<i>SUMMARY FIGURE PROJECTED GLOBAL MARKET SHARES OF TRANSPLANTATION PRODUCTS AND DEVICES, 2010 AND 2015 (%)</i> .....	7
<i>SUMMARY FIGURE (CONTINUED)</i> .....	8
CHAPTER THREE: INDUSTRY OVERVIEW .....	9
HISTORY OF TRANSPLANTATION .....	9
<i>TABLE 1 TIMELINE OF ORGAN TRANSPLANTATION HISTORY, 1900–2010</i> .....	10
INDUSTRY ACQUISITIONS .....	11
<i>TABLE 2 SELECTED TRANSPLANT INDUSTRY ACQUISITIONS, 2006–2010 (\$ MILLIONS)</i> .....	11
NECESSARY COMPONENTS TO ORGAN AND TISSUE TRANSPLANTATION .....	11
TISSUE TYPING .....	11
PRESERVATION .....	12
Tissue Preservation .....	12
IMMUNOSUPPRESSION .....	13
Newer Immunosuppressive Drugs .....	13
POSTOPERATIVE INFECTION CONTROL .....	14
OVERVIEW OF THE DONATION PROCESS .....	14
BLACK MARKET DONORS .....	15
THE TRANSPLANTATION PROCESS .....	15
PREPARATION .....	16
The Role of the Organ Procurement Organization .....	16
SURGERY .....	16
RECUPERATION .....	17
MAINTENANCE .....	17
New Studies on Maintenance Immunosuppression .....	18
SOLID ORGANS .....	18

COST OF SOLID ORGAN TRANSPLANTATION IN THE U.S. ....	18
<i>TABLE 3 U.S. ORGAN TRANSPLANTS: AVERAGE FIRST YEAR COST,</i>	
<i>ESTIMATED NUMBER OF PROCEDURES, AND VALUE BY TYPE</i>	
<i>OF ORGAN TRANSPLANT, 2008</i> .....	19
KIDNEY TRANSPLANTS IN THE U.S.....	19
Living Donor Efforts .....	20
Necessary Inputs for Successful Kidney Transplantation.....	20
LIVER TRANSPLANTATION IN THE U.S. ....	20
Promising Treatments.....	20
Necessary Inputs for Successful Liver Transplantation.....	20
HEART TRANSPLANTS IN THE U.S.....	21
Necessary Inputs for Successful Heart Transplantation.....	21
INTESTINE TRANSPLANTATION IN THE U.S. ....	21
Necessary Inputs for Successful Intestine Transplantation.....	21
PANCREAS TRANSPLANTATION IN THE U.S. ....	22
Current Research.....	22
Necessary Inputs for Successful Pancreas	
Transplantation.....	23
TISSUE TRANSPLANTATION IN THE U.S.....	23
TRANSPLANTATION TRENDS OUTSIDE THE U.S. ....	23
ORGAN DONATION IN EUROPE .....	23
Establishing Death in the EU.....	24
Transplant Organizations in the EU .....	24
JAPANESE ORGAN TRANSPLANT CRITERIA.....	25
Three Key Elements of Conventional Death in Japan.....	25
TRENDS IN LIVING AND CADAVERIC DONATIONS	
OUTSIDE THE U.S. ....	26
SOLID ORGAN TRANSPLANTATION OUTSIDE THE U.S.....	26
<i>TABLE 4 NUMBER OF DONATED CADAVERIC ORGANS BY</i>	
<i>SELECTED REGION, 2004–2008</i> .....	27
TISSUE TRANSPLANTATION OUTSIDE THE U.S. ....	27
Brazil.....	27
China.....	27
Austria .....	27
South Korea .....	28
Slovakia.....	28
Tunisia .....	28
India .....	28
LIMITED SUPPLY CURTAILS TRANSPLANTATIONS .....	28
LIVING DONOR PROGRAMS .....	28
KEY FACTORS IN INDUSTRY GROWTH .....	29
REDUCING DEMAND .....	29
INCREASING PATIENT SURVIVAL RATES .....	29

<i>TABLE 5 ADJUSTED U.S. GRAFT SURVIVAL RATES BY ORGAN FOR TRANSPLANTS PERFORMED, 2000–2007 (%)</i> .....	30
<i>TABLE 6 ADJUSTED U.S. PATIENT SURVIVAL RATES BY ORGAN FOR TRANSPLANTS PERFORMED, 2000–2007 (%)</i> .....	30
DEVELOPING ORGAN SUBSTITUTES.....	31
Organs from Animals: Xenotransplantation .....	31
Emotional/Ethical Implications of Xenotransplantation.....	31
Organ Primordia.....	32
KEY FACTORS INHIBITING GROWTH.....	33
LACK OF DONORS .....	33
ALTERNATIVE THERAPIES .....	33
PHARMACEUTICAL TREATMENTS.....	33
CULTURAL STIGMAS .....	34
Opt-in Consent and Presumed Consent .....	34
CHAPTER FOUR: TISSUE TYPING TECHNOLOGIES.....	35
PANEL REACTIVE ANTIBODIES .....	35
TISSUE TYPING TECHNOLOGIES.....	36
<i>TABLE 7 TISSUE TYPING TECHNOLOGIES</i> .....	36
SEQUENCE TYPING .....	37
PCR-Sequence Specific Oligonucleotides.....	37
PCR-Sequence Specific Primers.....	37
GLOBAL TISSUE TYPING MARKET .....	37
<i>TABLE 8 PROJECTED GLOBAL MARKET FOR TISSUE TYPING, THROUGH 2015 (\$ MILLIONS)</i> .....	38
COMMERCIALIZATION OPPORTUNITIES IN TISSUE TYPING .....	38
MARKET LEADERS.....	38
<i>FIGURE 1 GLOBAL MARKET SHARES IN TISSUE TYPING TECHNOLOGIES BY MARKET LEADER, 2010 (%)</i> .....	39
CHAPTER FIVE: SOLID ORGAN PROCUREMENT AND PRESERVATION .....	40
DEFINITION OF BRAIN DEATH.....	40
ORGANS OBTAINED FOR TRANSPLANT .....	40
INCREASING SUPPLY IN THE U.S. ....	41
THE TRANSPLANT GROWTH AND MANAGEMENT COLLABORATIVE.....	41
SUPPLY MANAGEMENT .....	42
REDUCING WASTE AND REJECTION.....	42
FIGHTING REJECTION.....	42
<i>TABLE 9 U.S. ORGAN RECIPIENTS WHO PREVIOUSLY HAD A TRANSPLANT: ALL ORGANS, 2003–2007*</i> .....	43
INCREASING THE HARVEST.....	43

<i>TABLE 10 RECOVERED ORGANS NOT USED BY TYPE IN U.S., 2003–2007</i> .....	43
NON-BEATING HEART DONORS .....	44
LESS WASTE .....	44
ORGAN PROCUREMENT OUTSIDE THE U.S. ....	44
MANAGEMENT OF DONATED ORGANS IN THE EU .....	44
CHINA .....	45
JAPAN .....	45
ALLOCATION CRITERIA IN THE U.S. ....	45
MELD/PELD SYSTEM .....	46
ALLOCATION CRITERIA IN THE EU .....	47
MELD/PELD IN THE U.K. ....	48
SOLID ORGAN PRESERVATION .....	48
<i>TABLE 11 PRESERVATION TIME FOR TRANSPLANTED ORGANS (HOURS)</i> .....	49
ORGAN PRESERVATION METHODS .....	49
Rinse and Preservation Solutions .....	50
<i>TABLE 12 MAJOR ORGAN PRESERVATION SOLUTIONS</i> .....	51
<i>FIGURE 2 GLOBAL MARKET SHARE OF ORGAN PRESERVATION SOLUTIONS BY MANUFACTURER, 2009 (%)</i> .....	51
<i>FIGURE 2 (CONTINUED)</i> .....	52
CELSIOR .....	52
COLLINS SOLUTION .....	52
CUSTODIOL .....	52
HYPOTHERMOSOL .....	52
VIASPAN .....	53
MARKET FOR PRESERVATION SOLUTIONS .....	53
<i>TABLE 13 PROJECTED GLOBAL MARKET FOR ORGAN PRESERVATION SOLUTIONS (NOT INCLUDING THE PAPWORTH COCKTAIL) BY GEOGRAPHIC REGION, THROUGH 2015 (\$ MILLIONS)</i> .....	54
MACHINE PERFUSION .....	54
MACHINE PERFUSION (CONTINUED) .....	55
CHAPTER SIX: TISSUE PRODUCTS .....	56
REGIONAL GROWTH IN TISSUE PRODUCTS .....	56
<i>TABLE 14 PROJECTED GROWTH IN TISSUE MARKET REVENUES BY REGION, THROUGH 2015 (\$ MILLIONS)</i> .....	56
<i>FIGURE 3 GLOBAL TISSUE MARKET SHARES BY REGION, 2010 AND 2015 (%)</i> .....	57
SOFT TISSUE ALLOGRAFT MARKET .....	58
OPPORTUNITIES IN THE TISSUE MARKET .....	58
<i>TABLE 15 PROJECTED GLOBAL TISSUE GRAFTING BY TISSUE TYPE, THROUGH 2015 (\$ MILLIONS)</i> .....	58
HEART VALVES .....	59

ADVANTAGES/DISADVANTAGES OF MECHANICAL, BIOLOGICAL, AND HOMOGRAFT HEART VALVES.....	59
Mechanical .....	59
Biological/Tissue .....	59
Homograft .....	59
GROWTH IN THE HEART VALVE MARKET .....	60
TABLE 16 GLOBAL HEART VALVE MARKET, THROUGH 2015 (\$ MILLIONS).....	60
TABLE 17 LEADING HEART VALVE SUPPLIERS, 2009 (\$ MILLIONS) .....	61
HEART VALVE MARKET IN THE FUTURE.....	61
CORNEA .....	61
CORNEAL TRANSPLANTS IN THE U.S. ....	62
GLOBAL CORNEAL TRANSPLANT MARKET .....	62
TABLE 18 PROJECTED GLOBAL GROWTH OF CORNEAL TRANSPLANT MARKET, THROUGH 2015* (\$ MILLIONS).....	62
COMPETITION IN THE CORNEAL TRANSPLANT MARKET .....	63
BLOOD STEM CELLS .....	63
HISTORY.....	64
First Successful Transplant .....	64
DONOR REGISTRIES .....	65
GLOBAL STEM CELL TRANSPLANT ACTIVITY .....	65
INDICATIONS FOR STEM CELL TRANSPLANTS .....	66
REJECTION.....	66
GLOBAL MARKET FOR BLOOD STEM CELL TRANSPLANTATION.....	67
TABLE 19 PROJECTED GLOBAL MARKET FOR BLOOD STEM CELL TRANSPLANTATION, THROUGH 2015 (\$ MILLIONS).....	68
POTENTIAL COMPLICATIONS OF STEM CELL TRANSPLANTATION.....	68
CORD BLOOD .....	68
CORD BLOOD BANKING.....	69
WORLDWIDE INCIDENCE OF PROCEDURES .....	69
TABLE 20 PROJECTED GLOBAL HEMATOPOIETIC STEM CELL TRANSPLANT PROCEDURES, THROUGH 2015 .....	70
THE ORTHOBIOLOGICS MARKET.....	70
TABLE 21 PROJECTED GLOBAL MARKET FOR ORTHOBIOLOGICAL PRODUCTS, THROUGH 2015 (\$ MILLIONS).....	71
BASE TISSUE.....	71
DEMINERALIZED BONE MATRIX PRODUCTS .....	71
MACHINED IMPLANTS.....	72
INTERNATIONAL BONE MARROW DONATION .....	72
TABLE 22 NUMBER OF BONE MARROW DONORS BY COUNTRY, 2010 .....	72
TABLE 22 (CONTINUED).....	73

SKIN AND COLLAGEN TRANSPLANTS .....	73
APPLICATIONS.....	74
MARKET FOR SKIN AND COLLAGEN TRANSPLANTS .....	74
<i>FIGURE 4 GLOBAL MARKET SHARES OF SELECTED MARKET LEADERS IN THE SKIN AND COLLAGEN TRANSPLANT MARKET, 2009 (%).....</i>	<i>75</i>
<i>TABLE 23 PROJECTED GLOBAL GROWTH OF SKIN AND COLLAGEN TRANSPLANTS, THROUGH 2015 (\$ MILLIONS).....</i>	<i>76</i>
VASCULAR TISSUE TRANSPLANTATION IN THE U.S. ....	76
USES FOR VASCULAR TISSUE TRANSPLANTATION .....	76
WAITING LIST .....	77
PRODUCTS .....	77
GLOBAL MARKET FOR VASCULAR TISSUE .....	77
<i>TABLE 24 PROJECTED GLOBAL VASCULAR TISSUE TRANSPLANTATION MARKET, THROUGH 2015 (\$ MILLIONS).....</i>	<i>77</i>
COMMERCIAL OPPORTUNITIES IN TISSUE TRANSPLANTATION .....	78
<i>TABLE 25 SELECTED COMMERCIAL OPPORTUNITIES IN TISSUE TRANSPLANTATION, 2010.....</i>	<i>78</i>
CHAPTER SEVEN: IMMUNOSUPPRESSANTS.....	79
TOLERANCE OF TRANSPLANTED ORGANS .....	79
ANTISENSE THERAPY.....	79
COSTIMULATION .....	80
CHIMERISM .....	80
USUAL ANTI-REJECTION DRUG PROTOCOLS .....	81
TYPES OF IMMUNOSUPPRESSANTS.....	81
<i>TABLE 26 PROJECTED GLOBAL MARKET FOR IMMUNOSUPPRESSANTS USED IN TRANSPLANTS BY TYPE, THROUGH 2015 (\$ MILLIONS).....</i>	<i>82</i>
<i>FIGURE 5 PROJECTED GLOBAL MARKET SHARES OF IMMUNOSUPPRESSIVES BY TYPE, THROUGH 2015 (%).....</i>	<i>82</i>
<i>FIGURE 5 (CONTINUED) .....</i>	<i>83</i>
<i>TABLE 27 IMMUNOSUPPRESSANT DRUGS APPROVED IN THE U.S., THE EU, AND JAPAN, 2009 .....</i>	<i>84</i>
<i>TABLE 28 IMMUNOSUPPRESSANTS BY DRUG CLASS, GENERIC NAME, BRAND NAME AND MANUFACTURER.....</i>	<i>84</i>
<i>TABLE 28 (CONTINUED).....</i>	<i>85</i>
CALCINEURIN INHIBITORS.....	85
CYCLOSPORIN .....	85
Generic Cyclosporine .....	86
TACROLIMUS .....	86
<i>TABLE 29 GLOBAL MARKET FOR CALCINEURIN INHIBITORS TO TREAT ORGAN TRANSPLANT REJECTION, THROUGH 2015 (\$ MILLIONS).....</i>	<i>86</i>
ANTI-PROLIFERATIVE AGENTS.....	86

AZATHIOPRINE.....	87
MYCOPHENOLATE MOFETIL.....	87
MYCOPHENOLATE SODIUM .....	88
Cyclophosphamide.....	88
<i>TABLE 30 GLOBAL MARKET FOR ANTI-PROLIFERATIVE AGENTS</i>	
<i>TO TREAT ORGAN TRANSPLANT REJECTION, THROUGH 2015 (\$</i>	
<i>MILLIONS).....</i>	<i>88</i>
M-TOR INHIBITORS .....	88
SIROLIMUS .....	89
TEMSIROLIMUS .....	89
EVEROLIMUS (AFFINITOR).....	89
EVEROLIMUS (CERTICAN) .....	90
<i>TABLE 31 PROJECTED GLOBAL MARKET FOR M-TOR INHIBITORS</i>	
<i>TO TREAT ORGAN TRANSPLANT REJECTION, THROUGH 2015 (\$</i>	
<i>MILLIONS).....</i>	<i>90</i>
MONOCLONAL, POLYCLONAL ANTIBODIES.....	90
<i>TABLE 32 ANTIBODY PRODUCTS FOR TREATMENT OF ORGAN</i>	
<i>TRANSPLANT REJECTION.....</i>	<i>91</i>
MONOCLONAL ANTIBODY PRODUCTS.....	91
Muromomab-CD3 .....	91
Basiliximab .....	92
Alemtuzumab.....	92
Off-label Medications.....	92
Rituximab.....	92
Daclizumab.....	93
<i>TABLE 33 PROJECTED GLOBAL MARKET FOR MONOCLONAL</i>	
<i>ANTIBODY PRODUCTS, THROUGH 2015 (\$ MILLIONS).....</i>	<i>93</i>
POLYCLONAL ANTIBODY PRODUCTS .....	93
Thymoglobulin .....	93
<i>TABLE 34 PROJECTED GLOBAL MARKET FOR POLYCLONAL</i>	
<i>ANTIBODY PRODUCTS, THROUGH 2015 (\$ MILLIONS).....</i>	<i>94</i>
TREATMENTS BY STAGE OF PROCEDURE.....	94
INDUCTION THERAPY.....	95
Disadvantages of Induction Therapy .....	95
Standard Treatments .....	95
<i>TABLE 35 IMMUNOSUPPRESSANT USE FOR INDUCTION BY</i>	
<i>ORGAN IN U.S., 2007 .....</i>	<i>96</i>
MARKET COMMERCIALIZATION POSSIBILITIES.....	96
MAINTENANCE THERAPY.....	97
<i>TABLE 36 IMMUNOSUPPRESSANT USE FOR MAINTENANCE (UP</i>	
<i>TO 2 YEARS POST TRANSPLANT) BY ORGAN, 2006* (%) .....</i>	<i>98</i>
<i>TABLE 36 (CONTINUED).....</i>	<i>99</i>
<i>TABLE 36 (CONTINUED).....</i>	<i>100</i>
IMMUNOSUPPRESSANT USE IN REJECTION THERAPY .....	100

<i>TABLE 37 IMMUNOSUPPRESSANT USE FOR REJECTION THERAPY FOLLOWING SOLID ORGAN TRANSPLANTATION BY ORGAN, 2006* (%)</i> .....	101
<i>TABLE 37 (CONTINUED)</i> .....	102
MARKET POSSIBILITIES FOR FUTURE TRANSPLANTATION	
DRUGS.....	102
IMMUNOSUPPRESSIVE AGENTS IN DEVELOPMENT .....	103
<i>TABLE 38 SELECTED IMMUNOSUPPRESSIVE AGENTS IN DEVELOPMENT, 2010</i> .....	103
CHAPTER EIGHT: ANTI-INFECTIVES AND POST-TRANSPLANT MONITORING IN ORGAN AND TISSUE TRANSPLANTATION.....	104
ANTI-INFECTIVES AND IMMUNOSUPPRESSANTS .....	104
<i>TABLE 39 COMMON ANTI-INFECTIVE AND IMMUNOSUPPRESSANT AGENTS AND INTERACTIONS, 2009</i> .....	105
<i>TABLE 39 (CONTINUED)</i> .....	106
MARKET FOR ANTI-INFECTIVES IN TRANSPLANTATION .....	106
<i>TABLE 40 POST-TRANSPLANT INFECTIONS BY TYPE OF TRANSPLANT, WITH COMMON TIME FRAMES FOR INFECTION</i> .....	106
<i>TABLE 40 (CONTINUED)</i> .....	107
<i>TABLE 40 (CONTINUED)</i> .....	108
POST-TRANSPLANT MONITORING.....	108
<i>TABLE 41 RECOMMENDED POST-TRANSPLANT CARE, 2009</i> .....	108
<i>TABLE 41 (CONTINUED)</i> .....	109
<i>TABLE 41 (CONTINUED)</i> .....	110
MARKET OPPORTUNITIES FOR POSTOPERATIVE MONITORING ....	111
<i>TABLE 42 ONE-YEAR ADJUSTED PATIENT SURVIVAL BY ORGAN FOR TRANSPLANTS, 2007 (%)</i> .....	111
<i>TABLE 43 SELECTED PHARMACEUTICAL PIPELINE FOR ANTI-INFECTIVES FOR TRANSPLANT RECIPIENTS, 2010</i> .....	112
CHAPTER NINE: ALTERNATIVE DEVICES AND TECHNOLOGIES.....	113
<i>TABLE 44 PROJECTED GLOBAL MARKET FOR TRANSPLANTATION ALTERNATIVE DEVICES, THROUGH 2015 (\$ MILLIONS)</i> .....	114
ALTERNATIVES TO CORNEAL TRANSPLANTATION .....	114
SURGICAL .....	114
Artificial Corneas.....	114
Retinal Transplants.....	115
Cellular Transplants.....	115
Electronic Implants .....	116
ALTERNATIVES TO INTESTINAL TRANSPLANTATION .....	116
MEDICAL.....	116
CELLULAR .....	116
ALTERNATIVES TO PANCREAS TRANSPLANTATION .....	117
SURGICAL.....	117



Islet Cell Transplantation .....	117
Difficulties of Islet Cell Transplantation .....	117
Cell Encapsulation.....	118
ReNeuron .....	118
ARTIFICIAL.....	119
Bioartificial Pancreas .....	119
Cerco Medical.....	120
CELLULAR .....	120
Cultured Stem Cells .....	120
DIMINISHED NEED FOR TRANSPLANTATION IN THE FUTURE.....	120
ALTERNATIVES TO LIVER TRANSPLANTATION .....	120
<i>TABLE 45 INDICATIONS FOR BIOARTIFICIAL LIVER TRANSPLANTATION.....</i>	<i>121</i>
ALTERNATIVES TO LUNG TRANSPLANTATION.....	121
MEDICAL.....	121
SURGICAL .....	122
ALTERNATIVES TO BONE GRAFTS .....	122
MEDICAL.....	123
SYNTHETIC MATERIALS .....	123
Orthovita.....	123
SPINE WAVE.....	124
REGEN BIOLOGICS .....	124
ALTERNATIVES TO VASCULAR TRANSPLANTATION .....	124
ANIMAL .....	124
Stentless Valves.....	125
Calcification .....	125
SURGICAL.....	125
Angioplasty and Stents .....	126
MEDICAL.....	126
MECHANICAL/SYNTHETIC.....	127
ALTERNATIVES TO VASCULAR TRANSPLANTATION .....	127
TISSUE ENGINEERING OF VASCULAR GRAFTS.....	127
GENE THERAPY .....	128
Areas of Research .....	128
ALTERNATIVES TO SKIN TRANSPLANTATION .....	128
ANIMAL-BASED PRODUCTS.....	128
Biobrane .....	128
OaSIS .....	129
GROWTH FACTORS .....	129
ARTIFICIAL SKIN/SKIN REPLACEMENT PRODUCTS.....	129
ALTERNATIVES TO HEART TRANSPLANTATION .....	130
MEDICAL.....	130
SURGICAL .....	130

Cardiac Support Devices .....	130
Passive Support Systems .....	130
Heart Regeneration .....	131
MECHANICAL.....	131
Ventricular Assist Devices .....	131
Generations of Designs .....	132
Ambulatory, Implantable Devices.....	132
<i>TABLE 46 GLOBAL MARKET FOR ARTIFICIAL HEART DEVICES,</i>	
<i>THROUGH 2015 (\$ MILLIONS).....</i>	<i>133</i>
TOTAL ARTIFICIAL HEARTS .....	133
AbioMed .....	133
Syncardia .....	134
<i>TABLE 47 GLOBAL MARKET FOR TOTAL ARTIFICIAL HEARTS,</i>	
<i>THROUGH 2015 (\$ MILLIONS).....</i>	<i>134</i>
VENTRICULAR ASSIST DEVICES .....	134
Regeneration Instead of Replacement.....	135
<i>TABLE 48 GLOBAL MARKET FOR VADS, THROUGH 2015 (\$</i>	
<i>MILLIONS).....</i>	<i>135</i>
VAD as Destination Therapy .....	136
VAD Development Outside the U.S.....	136
ORTHOPEDIC DEVICES FOR TRANSPLANTATION .....	136
OPPORTUNITIES IN THE ORTHOPEDIC DEVICE MARKET .....	136
<i>TABLE 49 SELECTED GLOBAL COMMERCIAL OPPORTUNITIES</i>	
<i>FOR NEW DEVICES IN THE FUTURE.....</i>	<i>137</i>
<i>TABLE 50 PROJECTED GLOBAL MARKET FOR ORTHOPEDIC</i>	
<i>DEVICES USED IN TRANSPLANTATION, THROUGH 2015 (\$</i>	
<i>MILLIONS).....</i>	<i>138</i>
<i>FIGURE 6 GLOBAL MARKET FOR ORTHOPEDIC DEVICES, 2010</i>	
<i>AND 2015 (%).....</i>	<i>138</i>
<i>FIGURE 6 (CONTINUED) .....</i>	<i>139</i>
HIP.....	139
COSTS OF HIP REPLACEMENT SURGERIES.....	140
ALTERNATIVES TO HIP	
REPLACEMENT/RECONSTRUCTION.....	140
<i>TABLE 51 PROJECTED GLOBAL MARKET FOR HIP</i>	
<i>REPLACEMENTS, THROUGH 2015 (\$ MILLIONS).....</i>	<i>140</i>
KNEE.....	140
<i>TABLE 52 PROJECTED GLOBAL MARKET FOR KNEE</i>	
<i>REPLACEMENTS, THROUGH 2015 (\$ MILLIONS).....</i>	<i>141</i>
SPINE .....	141
<i>TABLE 53 PROJECTED GLOBAL MARKET FOR SPINAL</i>	
<i>RECONSTRUCTIVE PRODUCTS, THROUGH 2015 (\$ MILLIONS).....</i>	<i>142</i>
<i>FIGURE 7 GLOBAL MARKET SHARES OF THE SPINAL</i>	
<i>RECONSTRUCTION MARKET BY COMPANY, 2009 (%).....</i>	<i>142</i>

<i>FIGURE 7 (CONTINUED)</i> .....	143
EXTREMITIES.....	143
Market Drivers .....	143
<i>TABLE 54 PROJECTED GLOBAL MARKET FOR EXTREMITY REPAIR/REPLACEMENTS, THROUGH 2015 (\$ MILLIONS)</i> .....	144
CHAPTER TEN: REGULATIONS AND REIMBURSEMENT .....	145
REGULATIONS IN THE U.S. ....	145
HISTORY OF REGULATION IN THE U.S.....	146
REGULATIONS OUTSIDE THE U.S.....	146
TRANSPLANT “TOURISM” .....	146
REIMBURSEMENT IN THE U.S.....	147
ORGAN ACQUISITION COSTS .....	147
REIMBURSEMENT FOR HOSPITAL COSTS .....	148
REIMBURSEMENT FOR PHYSICIAN SERVICES.....	148
REIMBURSEMENT FOR IMMUNOSUPPRESSANTS IN THE U.S. ....	148
<i>TABLE 55 IMMUNOSUPPRESSIVE DRUGS CURRENTLY COVERED BY MEDICARE*</i> .....	149
<i>TABLE 56 OVERVIEW OF MEDICARE IMMUNOSUPPRESSIVE DRUG COVERAGE</i> .....	150
REIMBURSEMENT OUTSIDE THE U.S.....	150
TREATMENT IN EU COUNTRIES.....	150
CHAPTER ELEVEN: EMERGING PROCEDURES AND PRODUCTS IN DEVELOPMENT .....	151
MACHINE PERFUSION OF SOLID ORGANS .....	151
WATERS MEDICAL SYSTEMS .....	151
TRANSMEDICS, INC. ....	152
ORGAN PRESERVATION SOLUTIONS IN DEVELOPMENT .....	152
SOMAH.....	152
REGENERATIVE MEDICINE.....	153
APPLICATIONS IN LIVER TRANSPLANTS .....	153
ENGINEERED TISSUE .....	153
ISLET CELL TRANSPLANTATION .....	154
CELLULAR THERAPIES.....	154
<i>TABLE 57 TYPES OF REGENERATIVE CELLULAR THERAPIES</i> .....	154
ORGAN REJECTION STRATEGIES .....	154
STEM CELL RESEARCH .....	155
U.S. MORATORIUM ON STEM CELL RESEARCH FUNDING.....	155
ADVANCES IN CARDIOVASCULAR TREATMENTS .....	156
FIBROBLAST GROWTH FACTORS .....	156
CARDIOVASCULAR BIOTHERAPEUTIC, INC. ....	157
CARDIOVASCULAR GENE THERAPY.....	157
Major Approaches to Gene Transfer.....	158

Naked Plasmid DNA Transfer .....	159
Adenoviral Vectors .....	159
PHARMACEUTICAL PIPELINE DEVELOPMENT .....	160
<i>TABLE 58 PHARMACEUTICAL PIPELINE/DEVICE BY</i>	
<i>MANUFACTURER, TYPE OF PRODUCT, INDICATIONS FOR USE,</i>	
<i>AND STAGE OF CLINICAL TESTING .....</i>	<i>161</i>
CHAPTER TWELVE: COMPANY DIRECTORY .....	162
ABBOTT LABORATORIES .....	162
BUSINESS OVERVIEW .....	162
FINANCIALS .....	162
PRODUCTS .....	162
ADVANCED BIOHEALING, INC. ....	163
BUSINESS OVERVIEW .....	163
FINANCIALS .....	163
PRODUCTS .....	163
ALLOSOURCE .....	164
BUSINESS OVERVIEW .....	164
FINANCIALS .....	164
PRODUCTS .....	164
BUSINESS OVERVIEW .....	165
FINANCIALS .....	165
PRODUCTS .....	165
ARTHREX, INC. ....	166
BUSINESS OVERVIEW .....	166
FINANCIALS .....	166
PRODUCTS .....	166
ASTELLAS PHARMA, INC. ....	166
BUSINESS OVERVIEW .....	166
FINANCIALS .....	167
PRODUCTS .....	167
BIOMET, INC .....	167
BUSINESS OVERVIEW .....	167
FINANCIALS .....	168
PRODUCTS .....	168
BIORAD LABORATORIES .....	168
BUSINESS OVERVIEW .....	168
FINANCIALS .....	169
PRODUCTS .....	169
BRISTOL-MYERS SQUIBB .....	169
BUSINESS OVERVIEW .....	169
FINANCIALS .....	169
PRODUCTS .....	170
CELERA CORP. ....	170
BUSINESS OVERVIEW .....	170

FINANCIALS .....	171
PRODUCTS .....	171
CENTACOR ORTHO BIOTECH, LTD. ....	171
BUSINESS OVERVIEW .....	171
FINANCIALS .....	172
PRODUCTS .....	172
CONMED-LINVATEC CORP. ....	172
BUSINESS OVERVIEW .....	173
FINANCIALS .....	173
PRODUCTS .....	173
CRYOLIFE, INC. ....	174
BUSINESS OVERVIEW .....	174
FINANCIALS .....	175
PRODUCTS .....	175
DEPUY ORTHOPEDICS.....	175
BUSINESS OVERVIEW.....	176
FINANCIALS .....	176
PRODUCTS .....	176
DIAGAST.....	176
BUSINESS OVERVIEW.....	176
FINANCIALS .....	177
PRODUCTS .....	177
DR. F. KÖHLER CHEMIE GMBH .....	177
BUSINESS OVERVIEW.....	178
FINANCIALS .....	178
PRODUCTS .....	178
EDWARDS LIFESCIENCES .....	178
BUSINESS OVERVIEW.....	178
FINANCIALS .....	178
PRODUCTS .....	179
EXACTECH.....	179
BUSINESS OVERVIEW.....	179
FINANCIALS .....	179
PRODUCTS .....	180
FORTICELL BIOSCIENCE .....	180
BUSINESS OVERVIEW.....	180
FINANCIALS .....	181
PRODUCTS .....	181
GEN-PROBE, INC. ....	182
BUSINESS OVERVIEW.....	182
FINANCIALS .....	182
PRODUCTS .....	182
GENZYME .....	183
BUSINESS OVERVIEW.....	183

FINANCIALS .....	183
PRODUCTS .....	183
W.L. GORE & ASSOCIATES .....	184
BUSINESS OVERVIEW .....	184
FINANCIALS .....	184
PRODUCTS .....	185
HEMOCLEANSE, INC. ....	185
BUSINESS OVERVIEW .....	185
FINANCIALS .....	185
PRODUCTS .....	185
INTEGRA LIFESCIENCE .....	186
BUSINESS OVERVIEW .....	186
FINANCIALS .....	186
PRODUCTS .....	187
INVITROGEN (SEE LIFE TECHNOLOGIES) .....	187
JOHNSON & JOHNSON .....	187
BUSINESS OVERVIEW .....	187
FINANCIALS .....	187
PRODUCTS .....	187
KIADIS PHARMA .....	188
BUSINESS OVERVIEW .....	188
FINANCIALS .....	188
PRODUCTS .....	188
KINETIC CONCEPTS, INC. (KCI) .....	189
BUSINESS OVERVIEW .....	189
FINANCIALS .....	189
PRODUCTS .....	190
LIFEBLOOD MEDICAL, INC. ....	190
BUSINESS OVERVIEW .....	190
FINANCIALS .....	191
PRODUCTS .....	191
LIFECYCLE PHARMA A/S .....	191
BUSINESS OVERVIEW .....	191
FINANCIALS .....	192
PRODUCTS .....	192
LIFE TECHNOLOGIES .....	192
BUSINESS OVERVIEW .....	193
FINANCIALS .....	193
PRODUCTS .....	193
LIVING CELL TECHNOLOGIES, LTD. ....	193
BUSINESS OVERVIEW .....	194
FINANCIALS .....	194
PRODUCTS .....	194
LUMINEX CORP. ....	194

BUSINESS OVERVIEW.....	195
FINANCIALS .....	195
PRODUCTS .....	195
MEDTRONIC, INC.....	196
BUSINESS OVERVIEW.....	196
FINANCIALS .....	197
PRODUCTS .....	197
NOVARTIS AG .....	197
BUSINESS OVERVIEW.....	198
FINANCIALS .....	198
PRODUCTS .....	198
ONE LAMBDA, INC.....	199
BUSINESS OVERVIEW.....	199
FINANCIALS .....	199
PRODUCTS .....	199
ON-X LIFE TECHNOLOGIES, INC.....	200
BUSINESS OVERVIEW.....	200
FINANCIALS .....	200
PRODUCTS .....	200
ORGANOGENESIS, INC.....	200
BUSINESS OVERVIEW.....	201
FINANCIALS .....	201
PRODUCTS .....	201
ORTHO-CLINICAL DIAGNOSTICS .....	201
BUSINESS OVERVIEW.....	202
FINANCIALS .....	202
PRODUCTS .....	202
OSTEOTECH .....	202
BUSINESS OVERVIEW.....	202
FINANCIALS .....	203
PRODUCTS .....	203
PDL BIOPHARMA.....	204
BUSINESS OVERVIEW.....	204
FINANCIALS .....	204
PRODUCTS .....	204
PFIZER, INC.....	204
BUSINESS OVERVIEW.....	205
FINANCIALS .....	205
PRODUCTS .....	205
PROTEOME SCIENCES, PLC .....	206
BUSINESS OVERVIEW.....	206
FINANCIALS .....	206
PRODUCTS .....	206
ROCHE PHARMACEUTICALS.....	206

BUSINESS OVERVIEW.....	206
FINANCIALS .....	207
PRODUCTS .....	207
RTI BIOLOGICS.....	207
BUSINESS OVERVIEW.....	208
FINANCIALS .....	208
PRODUCTS .....	208
SMITH & NEPHEW, PLC.....	209
BUSINESS OVERVIEW.....	209
FINANCIALS .....	210
PRODUCTS .....	210
SORIN GROUP, S.P.A.....	211
BUSINESS OVERVIEW.....	211
FINANCIALS .....	211
PRODUCTS .....	212
ST. JUDE MEDICAL.....	212
BUSINESS OVERVIEW.....	213
FINANCIALS .....	213
PRODUCTS .....	213
STRYKER CORP. ....	214
BUSINESS OVERVIEW.....	214
FINANCIALS .....	214
PRODUCTS .....	214
SYNCARDIA SYSTEMS, INC.....	215
BUSINESS OVERVIEW.....	215
FINANCIALS .....	215
PRODUCTS .....	215
SYNOVIS SURGICAL INNOVATIONS .....	216
BUSINESS OVERVIEW.....	216
FINANCIALS .....	216
PRODUCTS .....	216
SYTHES (NORTH AMERICA).....	217
BUSINESS OVERVIEW.....	217
FINANCIALS .....	217
PRODUCTS .....	217
TEI BIOSCIENCE .....	218
BUSINESS OVERVIEW.....	218
FINANCIALS .....	218
PRODUCTS .....	219
TEVA PHARMACEUTICALS, LTD.....	219
BUSINESS OVERVIEW.....	219
FINANCIALS .....	219
PRODUCTS .....	219
TERUMO MEDICAL CORP.....	220



BUSINESS OVERVIEW.....	220
FINANCIALS .....	220
PRODUCTS .....	220
THORATEC CORP. ....	221
BUSINESS OVERVIEW.....	221
FINANCIALS .....	221
PRODUCTS .....	221
TORNIER, INC. (U.S.).....	222
BUSINESS OVERVIEW.....	222
FINANCIALS .....	222
PRODUCTS .....	222
TRANSMEDICS, INC.....	223
BUSINESS OVERVIEW.....	223
FINANCIALS .....	223
PRODUCTS .....	223
VIROPHARMA, INC.....	224
BUSINESS OVERVIEW.....	224
FINANCIALS .....	224
PRODUCTS .....	224
WORLDHEART CORP. ....	225
BUSINESS OVERVIEW.....	225
FINANCIALS .....	225
PRODUCTS .....	226
WRIGHT MEDICAL TECHNOLOGY, INC. ....	226
BUSINESS OVERVIEW.....	226
FINANCIALS .....	226
PRODUCTS .....	226
WYETH (SEE PFIZER) .....	227
ZIMMER HOLDINGS, INC.....	227
BUSINESS OVERVIEW.....	227
FINANCIALS .....	227
PRODUCTS .....	228
APPENDIX .....	229
DEFINITIONS .....	229
DEFINITIONS (CONTINUED).....	230
DEFINITIONS (CONTINUED).....	231
DEFINITIONS (CONTINUED).....	232
DEFINITIONS (CONTINUED).....	233