

INTRODUCTION	XXIII
STUDY GOALS AND OBJECTIVES.....	XXIII
REASONS FOR DOING THIS STUDY	XXIII
CONTRIBUTIONS TO THE STUDY AND FOR WHOM.....	XXIII
SCOPE AND FORMAT	XXIII
METHODOLOGY	XXIV
ABOUT THE AUTHOR.....	XXIV
RELATED BCC REPORTS	XXIV
INFORMATION SOURCES.....	XXIV
BCC ONLINE SERVICES.....	XXIV
DISCLAIMER	XXV
 SUMMARY.....	 XXVI
SUMMARY.....	XXVI
<i>SUMMARY TABLE PROJECTED GLOBAL CATHETER MARKET BY</i>	
<i>SEGMENT, THROUGH 2012 (\$ BILLIONS/%)</i>	<i>XXVII</i>
<i>SUMMARY FIGURE 1 GLOBAL CATHETER SEGMENT SHARES,</i>	
<i>2007 (%)</i>	<i>XXVII</i>
<i>SUMMARY FIGURE 2 PROJECTED GLOBAL CATHETER SHARES BY</i>	
<i>SEGMENT, 2012 (%)</i>	<i>XXVIII</i>
 GLOBAL CATHETER MARKET.....	 1
GLOBAL CATHETER MARKET (CONTINUED)	1
CATHETER APPLICATIONS.....	2
TYPES OF CATHETERS	3
CARDIOVASCULAR CATHETERS.....	3
<i>TABLE 1 INDICATIONS FOR CARDIAC CATHETERIZATION</i>	<i>4</i>
Types of Cardiac Catheters.....	4
Diagnostic Catheters	4
Therapeutic Catheters.....	5
Angiography Catheters.....	5
EP Catheters.....	5
Percutaneous Coronary Intervention (PCI)	
Catheters.....	6
<i>TABLE 2 PTCA PROCEDURES</i>	<i>7</i>
Rapid Exchange PTCA Balloon Catheters	7
Over-the-Wire PTCA Catheters.....	8
Guiding Catheter	8
UROLOGY CATHETERS.....	8
Urology Catheters (Continued).....	9
Types of Urology Catheters.....	10
Intermittent Catheterization	10
Indwelling Catheterization.....	10
Suprapubic Catheterization	11

Male External Condom Catheters.....	12
NEUROVASCULAR CATHETERS.....	12
INTRAVENOUS (IV) CATHETERS	13
Types of IV Catheters.....	14
Single Lumen Catheters.....	14
Multi-Lumen Catheter	14
Peripheral Vein Catheter	14
Central Venous Catheter.....	14
Peripherally Inserted Central Catheters.....	15
<i>TABLE 3 COMPLICATIONS DUE TO IV CATHETERS.....</i>	<i>16</i>
SPECIALTY CATHETERS.....	16
Types of Specialty Catheters.....	17
Thermodilution Catheters	17
Suction Catheters	17
Oximetry Catheters	18
END-USER PREFERENCES.....	18
SIZE OF CATHETER	19
MATERIAL USED	19
COATING	19
COST.....	20
DURATION OF CATHETER IN THE BODY.....	20
INFECTION	20
DEMOGRAPHIC IMPACT.....	20
ZERO DIVIDE.....	21
<i>TABLE 4 U.S. RATE OF CARDIOVASCULAR PROCEDURES, 2004*.....</i>	<i>21</i>
EUROPEAN DEMOGRAPHICS	22
<i>TABLE 5 EUROPEAN CORONARY PROCEDURES, 2004 (PER</i>	
<i> MILLION POPULATION).....</i>	<i>22</i>
ECONOMIC DEMOGRAPHICS.....	22
<i>TABLE 6 HEALTHCARE EXPENDITURE AS A PERCENTAGE OF GDP</i>	
<i> BY COUNTRY, 1960–2003.....</i>	<i>23</i>
<i>TABLE 7 PER CAPITA HEALTHCARE EXPENDITURE BY COUNTRY,</i>	
<i> 1960–2003 (\$).....</i>	<i>24</i>
CATHETER MATERIALS	25
KEY CHARACTERISTICS OF CATHETER MATERIALS.....	25
<i>TABLE 8 CHARACTERISTICS OF CATHETER MATERIALS.....</i>	<i>25</i>
CATHETER MATERIALS.....	26
LATEX	26
SILICONE	27
POLYURETHANE	28
POLYVINYL CHLORIDE (PVC).....	28
TEFLON (FLUOROPOLYMER)	28
POLYETHYLENE.....	28
CATHETER COATINGS	28

SILICONE ELASTOMER.....	29
HYDROPHILIC COATING	29
ANTIMICROBIAL COATING	29
SILVER COATING	30
ADVANTAGES AND DISADVANTAGES OF CATHETER MATERIALS.....	30
<i>TABLE 9 ADVANTAGES AND DISADVANTAGES OF CATHETER MATERIALS</i>	<i>30</i>
<i>TABLE 9 (CONTINUED)</i>	<i>31</i>
<i>TABLE 10 CATHETER PRODUCTS BY MATERIAL AND COATING TYPE</i>	<i>31</i>
<i>TABLE 10 (CONTINUED)</i>	<i>32</i>
ANALYSIS OF THE GLOBAL CATHETER MARKET.....	33
<i>FIGURE 1 FACTORS INFLUENCING THE MEDICAL DEVICE MARKET</i>	<i>33</i>
KEY MARKET CHALLENGES	34
LACK OF CLINICAL DATA DETERS ACCEPTANCE OF NEW PRODUCTS BY MEDICAL STAFF.....	34
GROUP PURCHASING IS INDUCING DOWNWARD PRICE PRESSURES	34
DEVELOPMENTS IN PHARMACOLOGICAL THERAPEUTICS ARE THREATENING USE OF CATHETERS	35
SOME SEGMENTS ARE HIGHLY CONCENTRATED, IMPACTING THE OVERALL GROWTH OF THE CATHETER MARKET	35
CATHETER REUSE IS IMPACTING SALES OF DISPOSABLE CATHETERS	35
KEY MARKET DRIVERS	35
INCREASE IN PROCEDURES HAS LED TO INCREASED DEMAND FOR CATHETERS.....	36
INCREASED DEMAND FOR DISPOSABLE CATHETERS DUE TO RISK OF INFECTION AND AIDS.....	36
NEW TECHNOLOGIES IN CATHETERS HAVE INCREASED CATHETER USE.....	36
INCREASE IN MINIMALLY INVASIVE PROCEDURES REQUIRING CATHETERS HAS INCREASED SALES	36
ADVANCES IN IMAGING TECHNOLOGY HAS LED TO NEW APPLICATIONS REQUIRING THE USE OF CATHETERS	37
KEY MARKET RESTRAINTS	37
PRICE EROSIONS DUE TO FIERCE COMPETITION ARE SHRINKING REVENUES	37
LONG FDA APPROVAL TIMES ARE RESULTING IN DELAYED LAUNCHES OF NEW PRODUCTS	37

REIMBURSEMENT ISSUES HAVE IMPACTED THE USE OF TECHNOLOGICALLY ADVANCED CATHETERS	38
PHYSICIANS IN THE BUSINESS LONG TERM TEND TO BE RELUCTANT TO ACCEPT NEW DEVICE TECHNOLOGIES	38
GLOBAL CATHETER MARKET ANALYSIS	38
REVENUES, SHARES, AND PROJECTIONS BY SEGMENT	39
<i>TABLE 11 PROJECTED GLOBAL CATHETER MARKET BY SEGMENT, THROUGH 2012 (\$ BILLIONS)</i>	39
<i>FIGURE 2 PROJECTED GLOBAL CATHETER MARKET, 2005-2012 (\$ BILLIONS)</i>	39
<i>TABLE 12 PROJECTED GLOBAL CATHETER MARKET SHARES BY SEGMENT, THROUGH 2012 (%)</i>	40
<i>FIGURE 3 GLOBAL CATHETER MARKET SHARES BY SEGMENT, 2007 (%)</i>	41
<i>FIGURE 4 PROJECTED GLOBAL CATHETER MARKET SHARES BY SEGMENT, 2012 (%)</i>	42
REVENUES, SHARES, AND PROJECTIONS BY REGION	42
<i>TABLE 13 PROJECTED GLOBAL CATHETER MARKET BY REGION, THROUGH 2012 (\$ BILLIONS)</i>	43
<i>FIGURE 5 PROJECTED GLOBAL CATHETER MARKET BY REGION, 2005-2012 (\$ BILLIONS)</i>	43
<i>TABLE 14 PROJECTED GLOBAL CATHETER MARKET SHARES BY REGION, 2007 AND 2012 (%)</i>	44
<i>FIGURE 6 GLOBAL CATHETER MARKET SHARES BY REGION, 2007 (%)</i>	44
<i>FIGURE 7 PROJECTED GLOBAL CATHETER MARKET SHARES BY REGION, 2012 (%)</i>	45
U.S. Catheter Market.....	45
European Catheter Market.....	46
Rest of the World Catheter Market	47
REPROCESSED CATHETERS.....	48
REPROCESSED CATHETERS (CONTINUED)	49
COMPETITIVE STRUCTURE.....	50
TYPES OF COMPETITION	50
TIERS OF COMPETITION	50
MERGERS AND ACQUISITIONS.....	51
<i>TABLE 15 KEY MERGERS AND ACQUISITIONS WITHIN THE CATHETER MARKET (\$)</i>	51
<i>TABLE 15 (CONTINUED)</i>	52
END-USER GROUPS	52
DISTRIBUTION STRUCTURE.....	53
PURCHASE STRUCTURE.....	53
COMPETITIVE FACTORS.....	54

Regulatory Environment.....	54
Pricing.....	54
Catheter Properties.....	54
Branding.....	54
SWOT ANALYSIS OF THE GLOBAL CATHETER MARKET.....	55
<i>FIGURE 8 SWOT ANALYSIS OF THE GLOBAL CATHETER MARKET.....</i>	<i>55</i>
STRENGTHS.....	55
WEAKNESSES.....	56
OPPORTUNITIES.....	56
THREATS.....	57
CARDIOVASCULAR CATHETERS.....	58
KEY MARKET CHALLENGES.....	58
CONTROVERSY REGARDING THE USE OF DRUG ELUTING STENTS (DES) IS AFFECTING CATHETER USE.....	58
PHARMACOLOGICAL APPROACHES IS THREATENING CATHETER DEMAND.....	58
LACK OF CLINICAL DATA IS HINDERING ACCEPTANCE OF NEWER CATHETERS BY PHYSICIANS.....	59
KEY MARKET DRIVERS.....	59
INCREASE IN THE INCIDENCE OF CV DISEASES IS INCREASING THE NUMBER OF PROCEDURES.....	59
POPULARITY OF ANGIOPLASTY AND STENTS OVER BYPASS SURGERY IS LEADING TO AN INCREASE IN THE USE OF CARDIAC CATHETERS.....	59
ANGIOGRAPHY, A NEAR FOOLPROOF METHOD IN THE DETECTION OF CARDIAC DISEASE, IS DRIVING THE INCREASE IN THE NUMBER OF DIAGNOSTIC PROCEDURES.....	60
INTERVENTIONAL CARDIAC PROCEDURES ARE MORE EFFECTIVE THAN DRUG-BASED THERAPIES.....	60
KEY MARKET RESTRAINTS.....	60
CONSTANT PRICE EROSION IS LEADING TO DECREASED REVENUES.....	60
DECREASE IN RESTENOSIS IS IMPACTING STENT PROCEDURES.....	61
CATHETER USAGE IS RESTRAINED DUE TO LOW REIMBURSEMENT RATES.....	61
CARDIOVASCULAR CATHETER MARKET ANALYSIS.....	62
REVENUES AND PROJECTIONS BY TYPE OF CATHETER.....	62
<i>TABLE 16 PROJECTED GLOBAL CARDIOVASCULAR CATHETER MARKET BY TYPE, THROUGH 2012 (\$ BILLIONS).....</i>	<i>62</i>
<i>FIGURE 9 PROJECTED GLOBAL CARDIOVASCULAR CATHETER MARKET BY TYPE, 2005-2012 (\$ BILLIONS).....</i>	<i>62</i>

MARKET SHARES AND PROJECTIONS BY TYPE OF CATHETER.....	63
<i>TABLE 17 PROJECTED GLOBAL CARDIOVASCULAR CATHETER MARKET SHARES BY TYPE, 2007 AND 2012 (%).....</i>	<i>63</i>
MARKET SHARES AND PROJECTIONS BY REGION	64
<i>FIGURE 10 GLOBAL CARDIOVASCULAR CATHETER SHARES BY REGION, 2007 (%).....</i>	<i>64</i>
<i>FIGURE 11 PROJECTED GLOBAL CARDIOVASCULAR CATHETER SHARES BY REGION, 2012 (%).....</i>	<i>64</i>
MARKET SHARES BY COMPANY	65
<i>TABLE 18 GLOBAL CARDIOVASCULAR CATHETER MARKET SHARES BY COMPANY, 2007 (%).....</i>	<i>66</i>
<i>FIGURE 12 GLOBAL CARDIOVASCULAR CATHETER MARKET SHARES BY COMPANY, 2007 (%).....</i>	<i>66</i>
CARDIOVASCULAR CATHETER PRODUCTS BY COMPANY	67
<i>TABLE 19 ANGIOGRAPHY CATHETER PRODUCTS BY COMPANY.....</i>	<i>67</i>
<i>TABLE 20 EP CATHETER PRODUCTS BY COMPANY.....</i>	<i>68</i>
<i>TABLE 20 (CONTINUED).....</i>	<i>69</i>
<i>TABLE 21 PTCA CATHETER PRODUCTS BY COMPANY.....</i>	<i>69</i>
<i>TABLE 21 (CONTINUED).....</i>	<i>70</i>
<i>TABLE 22 GUIDING CATHETER PRODUCTS BY COMPANY.....</i>	<i>70</i>
COMPETITIVE STRUCTURE.....	70
UROLOGY CATHETER MARKET	71
KEY MARKET CHALLENGES	71
USE OF LONG-TERM CATHETERS IS THREATENING THE GROWTH OF DISPOSABLE CATHETERS	71
USE OF CATHETERS HAS DECLINED DUE TO AN INCREASE IN THE NUMBER OF URINARY TRACT INFECTIONS (UTI)	71
SOME PHYSICIANS ARE NOT READY TO ACCEPT NEW PRODUCTS DUE TO A LACK OF CLINICAL DATA.....	71
KEY MARKET DRIVERS	72
INCREASE IN UROLOGY PROCEDURES IS LEADING TO INCREASED CATHETER USE.....	72
CATHETERS WITH ANTIMICROBIAL COATINGS ARE INCREASING CONFIDENCE IN THE USE OF CATHETERS	72
SOME PRODUCTS CAN BE USED BY PATIENTS THEMSELVES, INCREASING PATIENT ADOPTION.....	72
KEY MARKET RESTRAINTS	73
LENGTHY FDA APPROVAL TIMES HAVE LED TO DELAYS IN THE LAUNCH OF EFFECTIVE ANTIMICROBIAL CATHETERS	73

OCCURRENCES OF UTI IS DISCOURAGING CATHETER USAGE	73
UROLOGY CATHETER MARKET ANALYSIS.....	73
REVENUES AND PROJECTIONS BY TYPE OF CATHETER	73
TABLE 23 PROJECTED GLOBAL UROLOGY CATHETER MARKET BY TYPE, THROUGH 2012 (\$ BILLIONS)	73
FIGURE 13 PROJECTED GLOBAL UROLOGY CATHETER MARKET BY TYPE, 2005-2012 (\$ MILLIONS).....	74
MARKET SHARES AND PROJECTIONS BY TYPE OF CATHETER.....	75
TABLE 24 PROJECTED GLOBAL UROLOGY CATHETER MARKET SHARES BY TYPE, 2007 AND 2012 (%).....	75
FIGURE 14 PROJECTED GLOBAL UROLOGY CATHETER MARKET SHARES BY TYPE, 2007 (%).....	75
FIGURE 15 GLOBAL UROLOGY CATHETER MARKET SHARES BY TYPE, 2012 (%)	76
MARKET SHARES BY COMPANY	77
TABLE 25 GLOBAL UROLOGY CATHETER MARKET SHARES BY COMPANY, 2007 (%).....	77
FIGURE 16 UROLOGY CATHETER MARKET SHARES BY COMPANY, 2007 (%).....	78
UROLOGY CATHETER PRODUCTS BY COMPANY	78
TABLE 26 UROLOGY CATHETER PRODUCTS BY COMPANY.....	79
COMPETITIVE STRUCTURE.....	80
NEUROVASCULAR CATHETER MARKET	81
KEY MARKET CHALLENGES	81
COST OF SPECIALIZED MICROCATHETERS IMPACTS THEIR ADOPTION	81
KEY MARKET DRIVERS	81
ADVANCES IN IMAGING TECHNOLOGIES ARE CREATING NEW AREAS OF DIAGNOSIS AND TREATMENT	81
STENTING AND ANEURYSM TREATMENTS ARE INCREASING CATHETER USE.....	82
NEW CATHETER TECHNOLOGIES ARE IMPROVING PROCEDURESAND INCREASING DEMAND	82
MARKET POTENTIAL EXISTS IN UNMET TREATMENT OPTIONS	82
KEY MARKET RESTRAINTS	83
INCREASED AVAILABILITY OF PHARMACOLOGICAL TREATMENT OPTIONS IS INHIBITING NEURO CATHETER USE.....	83
SHORTAGE OF PROFESSIONALS QUALIFIED TO PERFORM INVASIVE NEUROLOGICAL PROCEDURES IS IMPACTING NEURO CATHETER SALES	83

MANY PATIENTS DIE BEFORE RECEIVING TREATMENT	83
NEUROVASCULAR CATHETER MARKET ANALYSIS	83
REVENUES AND PROJECTIONS BY SEGMENT	84
<i>TABLE 27 PROJECTED GLOBAL NEUROVASCULAR CATHETER</i>	
<i>MARKET, THROUGH 2012 (\$ BILLIONS)</i>	84
<i>FIGURE 17 PROJECTED GLOBAL NEUROVASCULAR CATHETER</i>	
<i>MARKET, 2005-2012 (\$ BILLIONS)</i>	84
MARKET SHARES BY COMPANY	85
<i>TABLE 28 GLOBAL NEUROVASCULAR CATHETER MARKET</i>	
<i>SHARES BY COMPANY, 2007 (%)</i>	85
<i>FIGURE 18 GLOBAL NEUROVASCULAR CATHETER MARKET</i>	
<i>SHARES BY COMPANY, 2007 (%)</i>	86
NEUROVASCULAR CATHETER PRODUCTS BY COMPANY	86
<i>TABLE 29 NEUROVASCULAR CATHETER PRODUCTS BY COMPANY</i>	86
COMPETITIVE STRUCTURE.....	87
INTRAVENOUS CATHETER MARKET	88
KEY MARKET CHALLENGES	88
LACK OF CLINICAL DATA CHALLENGES ADOPTION OF	
NEW IV CATHETERS	88
MANUFACTURERS FACE PRICE EROSION AND FIERCE	
COMPETITION	88
KEY MARKET DRIVERS	88
STRICT CATHETER REPLACEMENT RULES ARE	
INCREASING SALES	88
IV CATHETERS WITH ANTIMICROBIAL COATINGS HAVE	
IMPROVED THEIR MARKETABILITY	89
INCREASE IN APPLICATIONS AND INTRODUCTION OF	
NEW TECHNOLOGY IS BOOSTING IV CATHETER	
SALES	89
KEY MARKET RESTRAINTS	89
CONSTANT PRICE EROSION IS LEADING REVENUE	
LOSSES	89
REIMBURSEMENT ISSUES REDUCE THE USE OF HIGH-	
END IV CATHETERS	90
INTRAVENOUS CATHETER MARKET ANALYSIS.....	90
REVENUES AND PROJECTIONS BY CATHETER TYPE	90
<i>TABLE 30 PROJECTED GLOBAL IV CATHETER MARKET BY TYPE,</i>	
<i>THROUGH 2012 (\$ BILLIONS)</i>	90
<i>FIGURE 19 PROJECTED GLOBAL INTRAVENOUS CATHETER</i>	
<i>MARKET, 2005-2012 (\$ BILLIONS)</i>	91
MARKET SHARES AND PROJECTIONS BY CATHETER	
TYPE	91
<i>TABLE 31 PROJECTED GLOBAL INTRAVENOUS CATHETER</i>	
<i>SHARES BY TYPE, 2007 (%)</i>	92

<i>FIGURE 20 GLOBAL INTRAVENOUS CATHETER SHARES BY TYPE, 2007 (%)</i>	92
<i>FIGURE 21 PROJECTED GLOBAL INTRAVENOUS CATHETER SHARES BY TYPE, 2012 (%)</i>	93
MARKET SHARES BY COMPANY.....	93
<i>TABLE 32 GLOBAL INTRAVENOUS CATHETER MARKET SHARES BY COMPANY, 2007 (%)</i>	94
<i>FIGURE 22 GLOBAL INTRAVENOUS CATHETER MARKET SHARES BY COMPANY, 2007 (%)</i>	94
IV CATHETER PRODUCTS BY COMPANY.....	95
Peripheral Intravenous Catheter Products by Company.....	95
<i>TABLE 33 PERIPHERAL INTRAVENOUS CATHETER PRODUCTS BY COMPANY</i>	95
Central Venous Catheter Products by Company.....	96
<i>TABLE 34 CENTRAL VENOUS CATHETER PRODUCTS BY COMPANY</i>	96
PICC Products by Company.....	97
<i>TABLE 35 PICC PRODUCTS BY COMPANY</i>	97
COMPETITIVE STRUCTURE.....	97
SPECIALTY CATHETERS.....	98
KEY MARKET CHALLENGES.....	98
LACK OF CLINICAL DATA IN SUPPORT OF EFFICACY.....	98
KEY MARKET DRIVERS.....	98
DEMAND FOR ENHANCED MONITORING DEVICES IS LEADING TO MORE SALES.....	98
SPECIALTY CATHETER'S EFFECTIVENESS IS FUELING INTEREST IN MEDICAL STAFF AND PROMOTING USE.....	98
KEY MARKET RESTRAINTS.....	99
HIGH PRICE OF CATHETERS INHIBITS SALES.....	99
HIGH COST OF SPECIALTY CATHETERS RENDERS THEM UNAFFORDABLE FOR DEVELOPING COUNTRIES AND REDUCES REVENUES.....	99
SPECIALTY CATHETER MARKET ANALYSIS.....	99
REVENUES AND PROJECTIONS BY CATHETER TYPE.....	99
<i>TABLE 36 PROJECTED GLOBAL SPECIALTY CATHETER MARKET BY TYPE, THROUGH 2012 (\$ BILLIONS)</i>	99
<i>FIGURE 23 PROJECTED GLOBAL SPECIALTY CATHETER MARKET BY TYPE, 2005-2012 (\$ BILLIONS)</i>	100
MARKET SHARES AND PROJECTIONS BY CATHETER TYPE.....	101
<i>TABLE 37 PROJECTED GLOBAL SPECIALTY CATHETER MARKET SHARES BY TYPE, 2007 AND 2012 (%)</i>	101
<i>FIGURE 24 GLOBAL SPECIALTY CATHETER SHARES BY TYPE, 2007 (%)</i>	101

<i>FIGURE 25 PROJECTED GLOBAL SPECIALTY CATHETER SHARES</i>	
<i>BY TYPE, 2012 (%)</i>	102
MARKET SHARES BY COMPANY	102
<i>TABLE 38 SPECIALTY CATHETER MARKET SHARES BY COMPANY,</i>	
<i>2007 (%)</i>	103
<i>FIGURE 26 SPECIALTY CATHETER MARKET SHARES BY</i>	
<i>COMPANY, 2007 (%)</i>	103
SPECIALTY PRODUCTS BY COMPANY	104
<i>TABLE 39 SPECIALTY CATHETER PRODUCT APPLICATIONS BY</i>	
<i>COMPANY</i>	104
COMPETITIVE STRUCTURE.....	104
GOVERNMENT REGULATIONS AND ISSUES	105
CATHETER MARKET REGULATIONS	105
CLASS I MEDICAL DEVICES.....	105
CLASS II.....	105
CLASS III	106
<i>TABLE 40 CATHETER TYPES AND CLASS</i>	106
<i>TABLE 40 (CONTINUED)</i>	107
RECENT 510(K) APPROVALS BY FDA	107
<i>TABLE 41 U.S. FDA 510(K) APPROVALS OF CATHETERS, 2006–2007</i>	108
<i>TABLE 41 (CONTINUED)</i>	109
<i>TABLE 41 (CONTINUED)</i>	110
RECENT FDA APPROVALS (2005 TO 2007)	110
<i>TABLE 42 RECENT FDA APPROVALS</i>	110
IBI THERAPY DUAL 8 ABLATION CATHETER AND IBI	
1500T6 (USA) GENERATOR	111
NAVISTAR AND CELSIUS THERMOCOOL IRRIGATED	
DEFLECTABLE DIAGNOSTIC/ABLATION CATHETER	111
COAXIA NEUROFLO CATHETER	111
FDA RECALLS	112
MISLABELING	112
NON-STERILE CONDITIONS	112
MANUFACTURING DEFECTS.....	113
MALFUNCTIONS.....	113
<i>TABLE 43 CATHETER RECALLS IN THE PAST YEAR</i>	113
<i>TABLE 43 (CONTINUED)</i>	114
<i>TABLE 43 (CONTINUED)</i>	115
FDA APPROVAL PROCESS	115
PREMARKET NOTIFICATION 510(K).....	116
Premarket Notification 510(k) (Continued)	117
PREMARKET APPROVAL.....	118
INVESTIGATIONAL DEVICE EXEMPTION (IDE).....	118
ESTABLISHMENT REGISTRATION FORM	119
MEDICAL DEVICE LISTING.....	120

QUALITY SYSTEM (QS) REGULATION.....	120
LABELING	121
MEDICAL DEVICE REPORTING	121
HEALTHCARE STANDARDS	122
EUROPEAN STANDARDS	122
The Active Implantable Medical Device Directive (AIMD) [90/385/EEC].....	122
The Medical Device Directive (MDD) [93/42/EEC]	122
The <i>In Vitro</i> Medical Devices Directive (IVD) [98/79/EC]	122
ISO (INTERNATIONAL ORGANIZATION FOR STANDARDS).....	123
TABLE 44 CATHETER ISO NUMBERS.....	123
DIFFERENCES IN EUROPEAN AND U.S. REGULATIONS.....	124
COMPANY PROFILES	125
ABBOTT LABORATORIES.....	125
TABLE 45 ABBOTT LABORATORIES' CATHETER PRODUCTS.....	125
TABLE 45 (CONTINUED).....	126
ARROW INTERNATIONAL	126
TABLE 46 ARROW INTERNATIONAL CATHETER PRODUCTS.....	127
ASTRA TECH AB	127
TABLE 47 ASTRA TECH CATHETER PRODUCTS.....	128
B BRAUN MELSUNGEN AG	129
TABLE 48 B BRAUN CATHETER PRODUCTS.....	129
BECTON, DICKINSON & CO.	129
TABLE 49 BD CATHETER PRODUCTS	130
BOSTON SCIENTIFIC.....	131
TABLE 50 BOSTON SCIENTIFIC CATHETER PRODUCTS.....	132
CARDINAL HEALTH.....	132
TABLE 51 CARDINAL HEALTH CATHETER PRODUCTS.....	133
COLOPLAST GROUP	133
TABLE 52 COLOPLAST CATHETER PRODUCTS	134
COOK MEDICAL.....	134
TABLE 53 COOK MEDICAL CATHETER PRODUCTS	135
CR BARD.....	136
TABLE 54 CR BARD CATHETER PRODUCTS.....	137
TABLE 54 (CONTINUED).....	138
EDWARDS LIFESCIENCES	138
TABLE 55 EDWARDS LIFESCIENCES CATHETER PRODUCTS	139
HOSPIRA, INC.	139
TABLE 56 HOSPIRA CATHETER PRODUCTS.....	140
IRVINE BIOMEDICAL, INC.	140
TABLE 57 IRVINE BIOMEDICAL CATHETER PRODUCTS.....	141
JOHNSON & JOHNSON	141
TABLE 58 JOHNSON & JOHNSON CATHETER PRODUCTS.....	142
MEDTRONIC, INC.	143

<i>TABLE 59 MEDTRONIC CATHETER PRODUCTS</i>	143
ROCHESTER MEDICAL	143
<i>TABLE 60 ROCHESTER MEDICAL CATHETER PRODUCTS</i>	144
SMITHS MEDICAL	145
<i>TABLE 61 SMITHS MEDICAL CATHETER PRODUCTS</i>	145
<i>TABLE 61 (CONTINUED)</i>	146
ST. JUDE MEDICAL.....	146
<i>TABLE 62 ST. JUDE MEDICAL CATHETER PRODUCTS</i>	147
TERUMO MEDICAL CORP.....	147
<i>TABLE 63 TERUMO CORP. CATHETER PRODUCTS</i>	148
<i>TABLE 63 (CONTINUED)</i>	149
<i>TABLE 64 REVENUES OF KEY CATHETER MANUFACTURERS, 2005</i> <i>AND 2006 (\$ BILLIONS)</i>	149
<i>TABLE 64 (CONTINUED)</i>	150
PATENT ANALYSIS	151
PATENT ANALYSIS BY SEGMENT	151
<i>TABLE 65 CATHETER PATENT SHARES BY SEGMENT, 2002 TO</i> <i>MAY 2007 (%)</i>	151
<i>FIGURE 27 CATHETER PATENT SHARES BY SEGMENT, 2002 TO</i> <i>MAY 2007 (%)</i>	152
CARDIOVASCULAR CATHETER PATENTS	152
<i>TABLE 66 CARDIOVASCULAR CATHETER PATENT ACTIVITY BY</i> <i>TYPE, 2002 TO MAY 2007</i>	153
<i>FIGURE 28 CARDIOVASCULAR PATENT ACTIVITY BY TYPE, 2002</i> <i>TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	153
UROLOGY CATHETER PATENTS.....	153
<i>TABLE 67 UROLOGY CATHETER PATENT ACTIVITY BY TYPE, 2002</i> <i>TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	154
<i>FIGURE 29 UROLOGY CATHETER PATENT ACTIVITY BY TYPE,</i> <i>2002 TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	154
IV CATHETER PATENTS.....	154
<i>TABLE 68 IV CATHETER PATENT ACTIVITY BY TYPE, 2002 TO MAY</i> <i>2007 (NUMBER OF PATENTS FILED)</i>	155
<i>FIGURE 30 IV CATHETER PATENT ACTIVITY, 2002 TO MAY 2007</i> <i>(NUMBER OF PATENTS FILED)</i>	155
SPECIALTY CATHETER PATENTS	156
<i>TABLE 69 SPECIALTY CATHETER PATENT ACTIVITY BY TYPE,</i> <i>2002 TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	156
<i>FIGURE 31 SPECIALTY CATHETER PATENT ACTIVITY BY TYPE,</i> <i>2002 TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	156
CATHETER PATENT ACTIVITY BY ASSIGNEE	157
<i>TABLE 70 CATHETER PATENT ACTIVITY BY ASSIGNEE, 2002 TO</i> <i>MAY 2007 (NUMBER OF PATENTS)</i>	157

<i>FIGURE 32 CATHETER PATENT SHARES BY ASSIGNEE, 2002 TO MAY 2007 (%)</i>	158
<i>FIGURE 32 (CONTINUED)</i>	159
<i>TABLE 71 U.S. CATHETER PATENT NUMBERS BY ASSIGNEE, 1995 TO MAY 2007</i>	159
<i>TABLE 71 (CONTINUED)</i>	160
CATHETER PATENT ACTIVITY BY COUNTRY	161
<i>TABLE 72 CATHETER PATENT ACTIVITY BY COUNTRY, 2002 TO MAY 2007</i>	161
<i>FIGURE 33 CATHETER PATENT SHARES BY COUNTRY, 2002 TO MAY 2007 (%)</i>	161
CATHETER PATENT ACTIVITY BY YEAR	162
<i>TABLE 73 PATENT FILINGS PER YEAR, 2002 TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	162
<i>FIGURE 34 PATENT FILINGS PER YEAR, 2002 TO MAY 2007 (NUMBER OF PATENTS FILED)</i>	162
U.S. PATENT ABSTRACTS	163
OCCLUSION BALLOON CATHETER WITH LONGITUDINALLY EXPANDABLE BALLOON	163
CATHETER-ADVANCEMENT ACTUATED NEEDLE RETRACTION SYSTEM	164
STEERABLE CATHETER.....	164
MULTI-LUMEN CATHETER HAVING A SOFT TIP	165
CATHETER FOR ELECTROPHYSIOLOGY.....	165
CATHETER WITH A DISPOSABLE BALLOON.....	166
CURVED ABLATION CATHETER FOR ENHANCED MANEUVERING	166
EXTERNAL URINARY CATHETER.....	167
MICROCATHETER FOR RETRIEVING EMBOLIC COILS.....	167
INTRAVENOUS CATHETER	168
HIGH TORQUE BALLOON CATHETER	168
SURGICAL CATHETER WITH AUXILIARY LUMEN	169
CONCLUSIONS OF THE PATENT ANALYSIS	169
APPENDIX	170
<i>TABLE 74 CATHETER DEFINITIONS</i>	170
<i>TABLE 74 (CONTINUED)</i>	171
<i>TABLE 75 KEY INDUSTRY WEBSITES</i>	171
<i>TABLE 76 KEY REGULATORY AND INFORMATION WEBSITES</i>	172
CURRENCY CONVERSIONS	172