

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND	1
GOALS AND OBJECTIVES.....	1
INTENDED AUDIENCE.....	2
SCOPE OF REPORT	2
METHODOLOGY	3
AUTHOR’S CREDENTIALS	3
RELATED BCC RESEARCH	3
BCC ONLINE SERVICES.....	4
DISCLAIMER	4
CHAPTER TWO: EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE U.S. MARKET FOR MEDICAL AUTOMATION</i> <i>PRODUCTS, THROUGH 2014 (\$ MILLIONS).....</i>	5
<i>SUMMARY FIGURE U.S. MEDICAL AUTOMATION MARKET BY</i> <i>FUNCTIONAL SEGMENTS, 2008 VS. 2014 (%).....</i>	6
CHAPTER THREE: OVERVIEW OF MEDICAL AUTOMATION	7
DEFINITIONS	7
MEDICAL AUTOMATION FUNCTIONS.....	7
HEALTH ASSESSMENT, MONITORING	7
IMAGING	8
PRESCRIPTION FORMULATION, DISPENSING.....	8
NONSURGICAL THERAPEUTIC APPLICATIONS	8
MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGERY	8
LABORATORY TESTING AND ANALYSIS	9
LOGISTICS, RESOURCE AND PATIENT TRACKING.....	9
HEALTHCARE PROFESSIONAL TRAINING	9
ENABLING TECHNOLOGIES FOR MEDICAL AUTOMATION	9
WIRELESS TECHNOLOGIES.....	10
SENSORS	10
Parameters Measured	11
Micro- and Nanosensors.....	11
Sensing Fabrics and Wearable Monitors.....	12
ROBOTICS	12
Surgical Robots	13
Other Medical Robot Applications	14
ARTIFICIAL INTELLIGENCE AND DECISION SUPPORT	15
Artificial Intelligence and Decision Support (Continued).....	16
<i>TABLE 1 MEDICAL APPLICATIONS OF ARTIFICIAL INTELLIGENCE.....</i>	17
RFID/BARCODING	17
END USER SEGMENTS.....	18
HOSPITALS	19

<i>FIGURE 1 TRENDS IN NUMBER OF U.S. HOSPITALS, 1995–2007</i> <i>(UNITS)</i>	19
<i>FIGURE 2 U.S. HOSPITALS WITH SURGERY DEPARTMENTS, 2008</i> <i>(NUMBER OF HOSPITALS)</i>	20
OUTPATIENT SURGERY CENTERS.....	20
PHYSICIAN PRACTICES.....	21
<i>FIGURE 3 TRENDS IN NUMBER OF ACTIVE U.S. PHYSICIANS, 1975–</i> <i>2007 (THOUSANDS)</i>	21
<i>TABLE 2 DISTRIBUTION OF U.S. PHYSICIANS BY PRACTICE</i> <i>SETTING/SIZE, 1996–2005 (%)</i>	22
RETAIL ESTABLISHMENTS.....	22
<i>FIGURE 4 TRENDS IN NUMBER OF RETAIL DRUG OUTLETS, 2000–</i> <i>2007 (THOUSAND UNITS)</i>	23
HOME CARE.....	23
<i>FIGURE 5 TRENDS IN U.S. EXPENDITURES ON HOME</i> <i>HEALTHCARE, 2000–2008* (\$ BILLIONS)</i>	24
MILITARY.....	24
<i>FIGURE 6 U.S. MILITARY HEALTH EXPENDITURES, FY 2000–FY</i> <i>2008 (\$ BILLIONS)</i>	25
MEDICAL RESEARCH/CLINICAL LABORATORIES.....	25
MEDICAL SCHOOLS/OTHER TRAINING INSTITUTIONS.....	26
<i>TABLE 3 U.S. MEDICAL AUTOMATION MARKET BY FUNCTION</i>	26
<i>FIGURE 7 U.S. MEDICAL AUTOMATION MARKET BY FUNCTION,</i> <i>2008–2014 (%)</i>	27
CHAPTER FOUR: MARKET ENVIRONMENT FOR MEDICAL AUTOMATION.....	28
LAWS AND REGULATIONS.....	28
FDA REGULATION.....	28
FDA Regulation (Continued).....	29
FDA Regulation (Continued).....	30
MEDICARE/MEDICAID RULES.....	31
DEMOGRAPHIC TRENDS.....	32
GROWTH AND STRUCTURAL CHANGES IN THE U.S. POPULATION.....	32
<i>TABLE 4 TRENDS IN TOTAL US POPULATION AND POPULATION</i> <i>AGED 65 AND OLDER, 2000–2014 (THOUSANDS)</i>	33
TRENDS IN THE NUMBER OF ELDERLY LIVING IN OWN HOMES.....	33
<i>FIGURE 8 TRENDS IN THE PERCENTAGE OF AMERICANS OVER</i> <i>65 REMAINING IN THEIR HOMES, 1985–2007 (%)</i>	34
TRENDS IN THE HEALTHCARE INDUSTRY.....	35
RISING HOSPITAL/NURSING HOME COSTS.....	35
<i>FIGURE 9 TRENDS IN U.S. HOSPITAL AND NURSING HOME COSTS</i> <i>SINCE 2000 (\$)</i>	35

<i>FIGURE 9 (CONTINUED)</i>	36
EXPENDITURES ON HOME HEALTHCARE	36
<i>FIGURE 10 TRENDS IN U.S. EXPENDITURES ON HOME</i>	
<i>HEALTHCARE, 2000–2007 (\$ BILLIONS)</i>	36
PHYSICIAN ATTITUDES TOWARD HOME CARE	37
<i>FIGURE 11 TREND IN NUMBER OF MEDICARE-PAID PHYSICIAN</i>	
<i>HOUSE CALLS, 2001 AND 2008 (MILLION HOUSE CALLS)</i>	37
DECLINING REIMBURSEMENT RATES	38
SHORTAGES OF HEALTHCARE PERSONNEL AND	
INCREASING WORKLOADS	39
Physicians	39
Surgeons.....	40
Nurses	41
HEALTHCARE PROFESSIONALS’ ATTITUDES TOWARDS	
AUTOMATION	42
CARE PROVIDER FINANCES	43
<i>FIGURE 12 EFFECT OF ECONOMIC DOWNTURN ON HOSPITALS’ IT</i>	
<i>SPENDING (%)</i>	44
 CHAPTER FIVE: AUTOMATED HEALTH ASSESSMENT AND	
MONITORING: TECHNOLOGIES, PRODUCTS AND MARKETS.....	45
SUMMARY.....	45
<i>FIGURE 13 TRENDS IN U.S. MARKET FOR AUTOMATED HEALTH</i>	
<i>ASSESSMENT AND MONITORING, 2008–2014 (\$ MILLIONS)</i>	45
AUTOMATED HOME MONITORING AND TELEMETRY.....	46
Objectives.....	46
Technologies.....	46
Embedded Monitors	46
Toilet Seats	46
Bathroom Mirrors	46
Elderly Walkers.....	47
Wearable Monitors.....	47
Wearable ... (Continued)	48
Home Telemetry Monitors.....	49
Telehomecare	49
Mobile Phone-based Technologies.....	49
Bluetooth	50
ZigBee	50
Signal Transmission via Human Skin.....	51
Current Commercial Status	51
Suppliers	51
<i>TABLE 5 DEVELOPERS AND SUPPLIERS OF AUTOMATED HOME</i>	
<i>MONITORING AND TELEMETRY SOLUTIONS</i>	52
TELEHEALTH KIOSKS.....	52
Objectives.....	52

Technologies.....	53
Commercial Status	53
Suppliers	54
<i>TABLE 6 SUPPLIERS OF TELEHEALTH KIOSKS.....</i>	<i>54</i>
AUTOMATED EYE EXAMINATION DEVICES	54
Objectives.....	54
Technologies.....	55
Automated Ophthalmic Instruments.....	55
Autorefractors	55
Autokeratometers	55
Aberrometers.....	55
Eye Health Kiosk	56
Suppliers	56
<i>TABLE 7 DEVELOPERS AND SUPPLIERS OF AUTOMATED EYE</i>	
<i>HEALTHCARE SOLUTIONS.....</i>	<i>57</i>
Current Commercial Status.....	57
AUTOMATED DRUG TESTING.....	57
Objectives.....	58
Technologies.....	59
Analytical Technologies	59
<i>FIGURE 14 DRUG TESTS BY TYPE OF TEST, 2008 (PERCENT OF</i>	
<i>ALL TESTS BY VALUE).....</i>	<i>59</i>
<i>FIGURE 14 (CONTINUED)</i>	<i>60</i>
Test Matrices.....	60
Eye Tracking Systems	61
Laboratory vs. Point-of-Collection Analysis	61
Commercial Status	61
Suppliers	62
<i>TABLE 8 DEVELOPERS AND SUPPLIERS OF AUTOMATED DRUG</i>	
<i>TESTING EQUIPMENT.....</i>	<i>62</i>
MARKETS.....	62
<i>TABLE 9 U.S. MARKET FOR AUTOMATED HEALTH ASSESSMENT</i>	
<i>AND MONITORING SYSTEMS BY TYPE OF SYSTEM, THROUGH</i>	
<i>2014 (\$ MILLIONS).....</i>	<i>62</i>
<i>FIGURE 15 AUTOMATED HEALTH MONITORING AND</i>	
<i>ASSESSMENT MARKET PRODUCT SEGMENTS (%).....</i>	<i>63</i>
WEARABLE MONITORS.....	64
<i>TABLE 10 HOME MONITORING AND TELEMETRY SALES, 2008–</i>	
<i>2014 (\$ MILLIONS).....</i>	<i>64</i>
Home Telemetry Monitors	64
<i>TABLE 11 SALES OF HOME TELEMETRY MONITORS, 2008– 2014 (\$</i>	
<i>MILLIONS).....</i>	<i>64</i>
TELEHEALTH KIOSKS.....	65

<i>TABLE 12 TELEHEALTH KIOSK SALES AND LEASE REVENUES, 2014 (UNITS/\$)</i>	66
AUTOMATED EYE HEALTHCARE TECHNOLOGIES	66
<i>TABLE 13 U.S. MARKET FOR AUTOMATED DIAGNOSTIC OPHTHALMIC EQUIPMENT (\$ MILLIONS)</i>	66
AUTOMATED DRUG TESTING.....	67
<i>FIGURE 16 AUTOMATED TEST EQUIPMENT SHARE OF DRUG TESTING MARKET, 2008 (%)</i>	67
<i>FIGURE 17 DRUG ABUSE VS. THERAPEUTIC DRUG TESTING SHARES OF AUTOMATED DRUG TESTING EQUIPMENT MARKET, 2008 (%)</i>	68
<i>TABLE 14 U.S. MARKET FOR AUTOMATED DRUG TESTING SYSTEMS (\$ MILLIONS)</i>	69
CHAPTER 6: AUTOMATED IMAGING AND IMAGE ANALYSIS	70
SUMMARY.....	70
<i>FIGURE 18 TRENDS IN US MARKET FOR AUTOMATED MEDICAL IMAGING TECHNOLOGIES, 2008–2014 (\$)</i>	70
TECHNOLOGIES AND PRODUCTS	71
AUTOMATED RADIOGRAPHY AND FLUOROSCOPY	71
Objectives.....	71
Technologies.....	71
Automated Radiography	71
Automated Fluoroscopy	72
CT Fluoroscopy.....	73
AUTOMATED WHOLE-BREAST ULTRASOUND	73
COMPUTER-AIDED DETECTION	74
AUTOMATED MICROSCOPY	74
AUTOMATED SKIN CANCER DETECTION.....	75
Automated Skin ... (Continued).....	76
Commercial Status	77
Suppliers	77
<i>TABLE 15 DEVELOPERS AND SUPPLIERS OF AUTOMATED IMAGING TECHNOLOGIES</i>	77
<i>TABLE 15 (CONTINUED)</i>	78
ENDOSCOPIC CAPSULES.....	78
Objective.....	78
Technologies.....	78
Current Commercial Status	79
Suppliers	79
<i>TABLE 16 CAPSULE ENDOSCOPY SUPPLIERS</i>	79
MARKETS.....	80
<i>TABLE 17 U.S. MARKET FOR AUTOMATED IMAGING SYSTEMS BY TYPE OF SYSTEM, THROUGH 2014 (\$ MILLIONS)</i>	80

<i>FIGURE 19 AUTOMATED IMAGING MARKET PRODUCT</i>	
<i>SEGMENTS, 2008-2014 (%).....</i>	<i>81</i>
AUTOMATED RADIOGRAPHY AND FLUOROSCOPY.....	81
<i>TABLE 18 U.S. MARKET FOR AUTOMATED RADIOGRAPHY AND</i>	
<i>FLUOROSCOPY SYSTEMS BY TYPE OF SYSTEM, THROUGH 2014</i>	
<i>(\$ MILLIONS).....</i>	<i>82</i>
Automated Radiography	82
<i>TABLE 19 U.S. MARKET FOR AUTOMATED RADIOGRAPHY</i>	
<i>SYSTEMS (\$ MILLIONS).....</i>	<i>82</i>
Fluoroscopy	83
<i>TABLE 20 U.S. MARKET FOR AUTOMATED FLUOROSCOPY</i>	
<i>SYSTEMS (\$ MILLIONS).....</i>	<i>83</i>
CAD.....	83
<i>TABLE 21 U.S. MARKET FOR CAD SYSTEMS (\$ MILLIONS).....</i>	<i>84</i>
AUTOMATED WHOLE BREAST ULTRASOUND.....	84
<i>TABLE 22 U.S. MARKET FOR AUTOMATED WHOLE BREAST</i>	
<i>ULTRASOUND SYSTEMS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>85</i>
AUTOMATED MICROSCOPY	85
<i>TABLE 23 U.S. MARKET FOR AUTOMATED MICROSCOPY</i>	
<i>SYSTEMS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>86</i>
AUTOMATED SKIN CANCER DETECTION.....	86
<i>TABLE 24 U.S. MARKET FOR AUTOMATED SKIN CANCER</i>	
<i>DETECTION SYSTEMS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>86</i>
CAPSULE ENDOSCOPY	87
<i>TABLE 25 U.S. MARKET FOR CAPSULE ENDOSCOPY SYSTEMS,</i>	
<i>THROUGH 2014 (\$ MILLIONS).....</i>	<i>87</i>
CHAPTER SEVEN AUTOMATED PRESCRIPTION FORMULATION AND	
DISPENSING: TECHNOLOGIES, PRODUCTS AND MARKETS	88
SUMMARY.....	88
<i>FIGURE 20 TRENDS IN US MARKET FOR AUTOMATED</i>	
<i>PRESCRIPTION FORMULATION AND DISPENSING</i>	
<i>TECHNOLOGIES, 2008–2014 (\$ MILLIONS).....</i>	<i>88</i>
OBJECTIVES.....	89
TECHNOLOGIES AND PRODUCTS	89
PACKAGING MACHINES	89
Tablet Counters	89
Unit-Dose or Blister Pack Repackaging and Dispensing	
Systems.....	89
INTRAVENOUS COMPOUNDERS.....	90
DISPENSING MACHINES	90
Centralized Dispensing Systems	90
Decentralized Dispensing Systems.....	90
CURRENT COMMERCIAL STATUS.....	91
SUPPLIERS	91

<i>TABLE 26 SUPPLIERS OF AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS</i>	92
MARKETS.....	92
<i>TABLE 27 U.S. MARKET FOR AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	92
<i>FIGURE 21 AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING PRODUCT SEGMENTS, 2008-2014 (%)</i>	93
HOSPITAL/INPATIENT SYSTEMS.....	93
<i>TABLE 28 U.S. MARKET FOR HOSPITAL/INPATIENT AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	94
PHARMACY/OUTPATIENT SYSTEMS.....	94
<i>TABLE 29 U.S. MARKET FOR PHARMACY/OUTPATIENT AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	94
 CHAPTER EIGHT: AUTOMATED THERAPEUTIC (NONSURGICAL) PROCEDURES: TECHNOLOGIES, PRODUCTS AND MARKETS.....	95
SUMMARY.....	95
<i>FIGURE 22 TRENDS IN US MARKET FOR AUTOMATED NON-SURGICAL THERAPEUTIC DEVICES, 2008–2014 (\$ MILLIONS)</i>	95
TECHNOLOGIES AND PRODUCTS.....	96
AUTOMATED DEFIBRILLATORS.....	96
Objectives.....	96
Technologies.....	96
Portable Automated Defibrillators.....	96
Wearable Defibrillators.....	96
Implantable Defibrillators.....	97
Current Commercial Status.....	98
Suppliers.....	98
<i>TABLE 30 AUTOMATED DEFIBRILLATOR MANUFACTURERS</i>	98
AUTOMATED MEDICATION DELIVERY SYSTEMS.....	99
Objectives.....	99
Technologies.....	99
Implantable Drug Pumps.....	99
Wearable Drug Pumps.....	100
Wearable ... (Continued).....	101
Current Commercial Status.....	102
Suppliers.....	102
<i>TABLE 31 AUTOMATED MEDICATION DELIVERY SYSTEM SUPPLIERS</i>	102
MARKETS.....	102
<i>TABLE 32 U.S. MARKET FOR AUTOMATED NON-SURGICAL THERAPEUTIC DEVICES, THROUGH 2014 (\$ MILLIONS)</i>	103

<i>FIGURE 23 AUTOMATED NON-SURGICAL THERAPEUTIC DEVICE</i>	
<i>SEGMENTS, 2008-2014 (%).....</i>	<i>103</i>
AUTOMATED DEFIBRILLATORS	104
<i>TABLE 33 U.S. MARKET FOR AUTOMATED DEFIBRILLATORS,</i>	
<i>THROUGH 2014 (\$ MILLIONS).....</i>	<i>104</i>
Portable Automated Defibrillators	104
<i>TABLE 34 U.S. MARKET FOR AUTOMATED EXTERNAL</i>	
<i>DEFIBRILLATORS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>104</i>
Implanted Cardioverter Defibrillators	105
<i>TABLE 35 U.S. MARKET FOR IMPLANTED CARDIOVERTER</i>	
<i>DEFIBRILLATORS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>105</i>
AUTOMATED MEDICATION DELIVERY SYSTEMS	106
<i>TABLE 36 U.S. MARKET FOR AUTOMATED MEDICATION</i>	
<i>DELIVERY SYSTEMS, THROUGH 2014 (\$ MILLIONS).....</i>	<i>106</i>
Wearable Systems	107
<i>TABLE 37 U.S. MARKET FOR WEARABLE AUTOMATED</i>	
<i>MEDICATION DELIVERY SYSTEMS, THROUGH 2014 (\$</i>	
<i>MILLIONS).....</i>	<i>107</i>
Implanted Systems	107
<i>TABLE 38 U.S. MARKET FOR IMPLANTED AUTOMATED</i>	
<i>MEDICATION DELIVERY SYSTEMS, THROUGH 2014 (\$</i>	
<i>MILLIONS).....</i>	<i>108</i>
CHAPTER NINE: MEDICAL ROBOTICS AND COMPUTER-ASSISTED	
SURGICAL DEVICES: TECHNOLOGIES, PRODUCTS AND MARKETS.....	109
SUMMARY.....	109
<i>FIGURE 24 TRENDS IN US MARKET FOR AUTOMATED MEDICAL</i>	
<i>IMAGING TECHNOLOGIES, 2008–2014 (\$ MILLIONS)</i>	<i>109</i>
TECHNOLOGIES AND PRODUCTS	110
SURGICAL PLANNERS AND SIMULATORS	110
Objectives.....	110
Technologies.....	110
Modeling of Organs and Deformations	111
Simulation of Actions and Force Feedback	
Reactions.....	111
Emerging Technologies.....	112
Web-Based Surgical Simulators.....	112
Virtual Surgery Tables	112
Current Commercial Status	113
Suppliers	113
<i>TABLE 39 STANDALONE SURGICAL PLANNERS AND SIMULATORS ...</i>	<i>113</i>
SURGICAL NAVIGATION SYSTEMS	114
Technologies.....	114
Imaging Technologies	114
Multi-Modal Imaging.....	114

Fluoroscopic Imaging	115
Video-enhanced Imagery	115
Microscopic Imagery	115
Endoscopic Imagery	116
Dynamic (Interventional) Imaging	117
Compact MRI Scanners	117
Intraoperative CT	118
Intraoperative Ultrasound	118
Tracking Technologies	118
Optical Tracking.....	118
Electromagnetic Tracking	119
Display Technologies	119
Virtual and Augmented Reality	119
Heads-up Displays	119
Suppliers	120
<i>TABLE 40 SURGICAL NAVIGATION SYSTEM SUPPLIERS</i>	<i>120</i>
SURGICAL ROBOTS.....	120
Objectives.....	121
Technologies.....	121
Robotically Assisted Micro-manipulation	121
Steady-hand Systems	122
Robotic “Wrists” and Other Dexterity	
Enhancements	122
Pre-programmed Robots	123
Constraint Robots	123
Voice Control.....	124
Other Emerging Technologies.....	124
New Robotic Arm Designs	124
Remote Surgery.....	125
Microbots	125
Suppliers	125
<i>TABLE 41 SUPPLIERS AND DEVELOPERS OF SURGICAL ROBOTICS....</i>	<i>126</i>
“INTELLIGENT OPERATING ROOMS” AND RELATED	
EQUIPMENT	126
Description.....	126
Technologies.....	126
Data Routing.....	127
User Interface	127
Open System Architectures.....	128
Suppliers	128
<i>TABLE 42 SUPPLIERS OF INTELLIGENT OPERATING ROOM</i>	
<i>SOLUTIONS AND COMPONENTS.....</i>	<i>128</i>
MARKETS.....	128

<i>TABLE 43 U.S. MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGERY MARKET BY TYPE OF EQUIPMENT, THROUGH 2014 (\$ MILLIONS)</i>	129
<i>FIGURE 25 U.S. MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGERY MARKET SHARES BY TYPE OF EQUIPMENT, 2008 VS. 2014 (PERCENT OF TOTAL SALES)</i>	130
CHAPTER TEN: AUTOMATED LABORATORY TESTING AND ANALYSIS: TECHNOLOGIES, PRODUCTS AND MARKETS	
ANALYSIS: TECHNOLOGIES, PRODUCTS AND MARKETS	131
<i>FIGURE 26 TRENDS IN US MARKET FOR AUTOMATED CLINICAL LABORATORY SYSTEMS, 2008– 2014 (\$ MILLIONS)</i>	131
<i>FIGURE 26 (CONTINUED)</i>	132
TECHNOLOGIES AND PRODUCTS	132
OBJECTIVES	132
TECHNOLOGIES	133
Central Laboratory Systems	133
Total Laboratory Automation.....	133
Modular Systems	133
Sample Processing	133
Quality Inspection.....	134
Standardized Interfaces.....	134
Point-of-Care Testing Systems.....	134
COMMERCIAL STATUS	135
SUPPLIERS	135
<i>TABLE 44 SUPPLIERS OF AUTOMATED LABORATORY TESTING AND ANALYSIS SYSTEMS</i>	135
MARKETS.....	136
SUMMARY	136
<i>TABLE 45 U.S. AUTOMATED LABORATORY TESTING AND ANALYSIS MARKET BY TYPE OF EQUIPMENT, THROUGH 2014 (\$ MILLIONS)</i>	136
<i>FIGURE 27 AUTOMATED LABORATORY TESTING AND ANALYSIS PRODUCT SEGMENTS, 2008-2014 (%)</i>	136
<i>FIGURE 27 (CONTINUED)</i>	137
CENTRAL LABORATORY SYSTEMS	137
<i>TABLE 46 U.S. AUTOMATED CENTRAL LABORATORY TESTING AND ANALYSIS MARKET BY TYPE OF EQUIPMENT, THROUGH 2014 (\$ MILLIONS)</i>	137
POINT-OF-CARE TESTING SYSTEMS.....	138
<i>TABLE 47 U.S. AUTOMATED POINT-OF-CARE TESTING AND ANALYSIS MARKET BY TYPE OF EQUIPMENT, THROUGH 2014 (\$ MILLIONS)</i>	138

CHAPTER ELEVEN: AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING: TECHNOLOGIES, PRODUCTS AND MARKETS	139
SUMMARY	139
<i>FIGURE 28 TRENDS IN US MARKET FOR AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING SYSTEMS, THROUGH 2014 (\$)</i>	139
TECHNOLOGIES AND PRODUCTS	140
AUTOMATED HOSPITAL PICKUP AND DELIVERY	140
Objectives	140
Technologies.....	140
Pneumatic Tubes	140
Automated Guided Vehicles	141
Commercial Status	142
Suppliers	142
HOSPITAL ASSET/PATIENT/STAFF TRACKING SYSTEMS	142
Objectives	143
Technologies.....	143
Active RFID.....	144
Wi-Fi.....	144
Hybrid Systems.....	145
Sensor Tags	145
Real-Time Location Systems	145
Commercial Status	146
Suppliers	146
<i>TABLE 49 SUPPLIERS OF HOSPITAL EQUIPMENT/PATIENT/STAFF/TRACKING SYSTEMS</i>	146
MARKETS.....	146
SUMMARY	146
<i>TABLE 50 U.S. MARKET FOR AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	147
<i>FIGURE 29 AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING SYSTEMS SEGMENTS. 2008-2014 (%)</i>	147
<i>FIGURE 29 (CONTINUED)</i>	148
AUTOMATED HOSPITAL PICKUP AND DELIVERY SYSTEMS.....	148
<i>TABLE 51 U.S. MARKET FOR HOSPITAL AUTOMATED LOGISTICS SYSTEMS THROUGH 2014 (\$ MILLIONS)</i>	148
Pneumatic Tubes	148
<i>TABLE 52 U.S. MARKET FOR HOSPITAL PNEUMATIC TUBE SYSTEMS THROUGH 2014 (\$ MILLIONS)</i>	149
AGVs	149

<i>TABLE 53 U.S. MARKET FOR HOSPITAL AGV SYSTEMS THROUGH 2014 (\$ MILLIONS)</i>	149
HOSPITAL PATIENT/STAFF/EQUIPMENT TRACKING	150
<i>TABLE 54 U.S. MARKET FOR HOSPITAL RTLS SYSTEMS THROUGH 2014 (\$ MILLIONS)</i>	150

CHAPTER TWELVE: AUTOMATED MEDICAL (NON-SURGICAL) PROFESSIONAL TRAINING: TECHNOLOGIES, PRODUCTS AND MARKETS	151
SUMMARY	151
<i>FIGURE 30 TRENDS IN US MARKET FOR AUTOMATED MEDICAL (NON-SURGICAL) TRAINING DEVICES, 2008–2014 (\$)</i>	151
OBJECTIVES.....	152
TECHNOLOGIES AND PRODUCTS	152
HUMAN PATIENT SIMULATORS	152
VIRTUAL REALITY TRAINERS	153
TEAM TRAINING.....	153
COMMERCIAL STATUS	153
SUPPLIERS	154
MARKETS.....	154
APPENDIX A: COMPANY PROFILES	155
ACROBOT COMPANY LTD. (SURGICAL PLANNERS, NAVIGATORS, ROBOTS).....	155
AEROSCOUT, INC.	155
ASTERES, INC. (AUTOMATED PRESCRIPTION FULFILLMENT).....	156
AWAREPOINT CORP.	156
BECKMAN COULTER, INC.	157
BRAINLAB AG (SURGICAL NAVIGATION SYSTEMS).....	157
CARD GUARD AG (HOME MONITORING AND TELEMETRY).....	158
CENTRAK INC.	159
CLEARCOUNT MEDICAL SOLUTIONS, INC.	159
COMPUTERIZED SCREENING INC. (TELEHEALTH KIOSKS).....	160
CURLIN MEDICAL, INC.	160
EKAHAU INC.	161
ESCREEN INC. (AUTOMATED DRUG TESTING SYSTEMS)	161
GE HEALTHCARE (SURGICAL NAVIGATION SYSTEMS).....	162
GIVEN IMAGING LTD.	162
ICAD INC. (COMPUTER-ASSISTED DETECTION AND DIAGNOSIS).....	163
INFIMED INC.....	163
INSULET CORP.	164
INTUITIVE SURGICAL, INC. (SURGICAL ROBOTICS).....	164
IRIS INTERNATIONAL, INC.....	165
MEDICAL EDUCATION TECHNOLOGIES, INC.	165

MEDVITAL (HOME MONITORING AND TELEMETRY)	166
MICROCHIPS INC.	166
NOVX SYSTEMS INC. (AUTOMATED DRUG TESTING).....	167
PARATA SYSTEMS LLC	167
PEVCO SYSTEMS INTERNATIONAL INC.	167
PHILIPS HEALTHCARE (AUTOMATED MEDICAL IMAGING)	168
POLARTECHNICS LTD.	168
QUIK, INC. (AUTOMATED PRESCRIPTION FULFILLMENT)	168
RF COMPANY LTD.....	169
ROBOTIC SURGICAL TECH, INC. (SURGICAL ROBOTICS)	169
SENSATEX (HOME MONITONRG AND TELEMETRY)	170
SIEMENS HEALTHCARE.....	170
SIMSURGERY (SURGICAL SIMULATORS)	171
STREETIME TECHNOLOGIES (AUTOMATED DRUG TESTING)	171
STRYKER CORP. (NAVIGATION SYSTEMS, INTELLIGENT OPERATING ROOMS).....	171
T+ MEDICAL AMERICAS (HOME MONITORING AND TELEMETRY)	172
U-SYSTEMS, INC. (AUTOMATED IMAGING SYSTEMS)	173
VERSUS TECHNOLOGY, INC.....	173
VIVOMETRICS INC.....	173
ZOLL MEDICAL CORP.....	174
APPENDIX B: PATENT ANALYSIS.....	175
<i>FIGURE 31 U.S. MEDICAL AUTOMATION PATENTS BY TYPE OF TECHNOLOGY (% OF PATENTS ISSUED THROUGH JUNE 1, 2009)....</i>	<i>175</i>
<i>FIGURE 31 (CONTINUED)</i>	<i>176</i>