

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND .....	1
GOALS AND OBJECTIVES.....	1
INTENDED AUDIENCE.....	2
SCOPE AND FORMAT .....	2
METHODOLOGY .....	3
AUTHOR’S CREDENTIALS .....	3
RELATED BCC RESEARCH .....	3
BCC ONLINE SERVICES.....	4
DISCLAIMER .....	5
CHAPTER TWO: EXECUTIVE SUMMARY.....	6
<i>SUMMARY TABLE U.S. MARKET FOR MEDICAL AUTOMATION</i> <i>PRODUCTS, THROUGH 2016 (\$ MILLIONS)</i> .....	6
<i>SUMMARY FIGURE U.S. MEDICAL AUTOMATION MARKET BY</i> <i>FUNCTIONAL SEGMENTS, 2010 VS. 2016 (%)</i> .....	7
CHAPTER THREE: OVERVIEW OF MEDICAL AUTOMATION .....	8
DEFINITIONS .....	8
MEDICAL AUTOMATION FUNCTIONS.....	8
HEALTH ASSESSMENT, MONITORING .....	8
IMAGING .....	9
PRESCRIPTION FORMULATION, DISPENSING.....	9
NONSURGICAL THERAPEUTIC APPLICATIONS .....	9
MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGERY .....	9
LABORATORY TESTING AND ANALYSIS .....	10
LOGISTICS, RESOURCE AND PATIENT TRACKING.....	10
HEALTHCARE PROFESSIONAL TRAINING .....	10
ENABLING TECHNOLOGIES FOR MEDICAL AUTOMATION .....	10
WIRELESS TECHNOLOGIES.....	11
SENSORS .....	11
Parameters that Are Measured .....	12
Micro- and Nanosensors.....	12
Sensing Fabrics and Wearable Monitors.....	13
ROBOTICS .....	14
Surgical Robots .....	14
Surgical Robots (Continued).....	15
Other Medical Robot Applications .....	16
ARTIFICIAL INTELLIGENCE AND DECISION SUPPORT .....	16
Artificial Intelligence and Decision Support (Continued).....	17
<i>TABLE 1 MEDICAL APPLICATIONS OF ARTIFICIAL INTELLIGENCE</i> .....	18
RFID/BARCODING .....	18
END USER SEGMENTS.....	19

HOSPITALS .....	20
<i>FIGURE 1 TREND IN THE NUMBER OF U.S. HOSPITALS, 1995–2010</i> <i>(UNITS)</i> .....	20
<i>FIGURE 2 U.S. HOSPITALS WITH SURGERY DEPARTMENTS, 2010</i> <i>(NUMBER OF HOSPITALS)</i> .....	21
OUTPATIENT SURGERY CENTERS .....	22
PHYSICIAN PRACTICES .....	22
<i>FIGURE 3 TREND IN THE NUMBER OF ACTIVE U.S. PHYSICIANS,</i> <i>2002 AND 2010 (THOUSANDS)</i> .....	22
<i>TABLE 2 DISTRIBUTION OF U.S. PHYSICIANS BY PRACTICE</i> <i>SETTING/SIZE, 1996–2005 (%)</i> .....	23
RETAIL ESTABLISHMENTS.....	23
<i>FIGURE 4 TREND IN THE NUMBER OF RETAIL DRUG OUTLETS,</i> <i>2000–2008 (THOUSAND UNITS)</i> .....	24
HOME CARE.....	24
<i>FIGURE 5 TRENDS IN U.S. EXPENDITURES ON HOME HEALTH</i> <i>CARE, 2000–2009 (\$ BILLIONS)</i> .....	25
MILITARY .....	25
<i>FIGURE 6 U.S. MILITARY HEALTH EXPENDITURES, FY 2000–FY</i> <i>2010 (\$ BILLIONS)</i> .....	26
MEDICAL RESEARCH/CLINICAL LABORATORIES .....	26
MEDICAL SCHOOLS/OTHER TRAINING INSTITUTIONS .....	27
MARKET SUMMARY.....	27
<i>TABLE 3 U.S. MEDICAL AUTOMATION MARKET BY FUNCTION</i> .....	27
<i>FIGURE 7 U.S. MEDICAL AUTOMATION MARKET SHARES (%)</i> .....	28

#### CHAPTER FOUR: MARKET ENVIRONMENT FOR MEDICAL

AUTOMATION.....	29
LAWS AND REGULATIONS.....	29
FDA REGULATION.....	29
FDA Regulation (Continued).....	30
FDA Regulation (Continued).....	31
MEDICARE/MEDICAID RULES .....	32
PATIENT PROTECTION AND AFFORDABLE CARE ACT.....	33
DEMOGRAPHIC TRENDS .....	34
GROWTH AND STRUCTURAL CHANGES IN THE U.S.	
POPULATION .....	34
<i>TABLE 4 TRENDS IN TOTAL U.S. POPULATION AND POPULATION</i> <i>AGED 65 AND OLDER, THROUGH 2016 (MILLIONS)</i> .....	35
TRENDS IN THE NUMBER OF ELDERLY PEOPLE LIVING IN THEIR OWN HOMES .....	35
<i>FIGURE 8 TRENDS IN THE PERCENTAGE OF AMERICANS OVER</i> <i>AGE 65 REMAINING IN THEIR HOMES, 1985–2008 (%)</i> .....	36
TRENDS IN THE HEALTHCARE INDUSTRY.....	36
RISING HOSPITAL/NURSING HOME COSTS .....	37

<i>FIGURE 9 TRENDS IN U.S. HOSPITAL AND NURSING HOME COSTS 2000 AND 2010 (\$)</i> .....	37
PHYSICIAN ATTITUDES TOWARD HOME CARE .....	38
<i>FIGURE 10 TREND IN THE NUMBER OF MEDICARE-PAID PHYSICIAN HOUSE CALLS, 2001 AND 2009 (MILLION HOUSE CALLS)</i> .....	38
DECLINING REIMBURSEMENT RATES .....	39
SHORTAGES OF HEALTHCARE PERSONNEL AND INCREASING WORKLOADS .....	40
Physicians .....	40
Physicians (Continued).....	41
Surgeons.....	42
Nurses .....	42
HEALTHCARE PROFESSIONALS' ATTITUDES TOWARD AUTOMATION .....	43
CARE PROVIDER FINANCES .....	44
<i>FIGURE 11 EFFECT OF ECONOMIC DOWNTURN ON HOSPITALS' IT SPENDING (%)</i> .....	45
Care Provider Finances (Continued) .....	46
 CHAPTER FIVE: AUTOMATED HEALTH ASSESSMENT AND MONITORING: TECHNOLOGIES, PRODUCTS, AND MARKETS.....	47
SUMMARY.....	47
<i>FIGURE 12 TRENDS IN U.S. MARKET FOR AUTOMATED HEALTH ASSESSMENT AND MONITORING, 2010–2016 (\$ MILLIONS)</i> .....	47
<i>FIGURE 12 (CONTINUED)</i> .....	48
TECHNOLOGIES AND PRODUCTS .....	48
AUTOMATED HOME MONITORING AND TELEMETRY.....	48
Objectives .....	48
Technologies.....	49
Embedded Monitors .....	49
Toilet seats.....	49
Bathroom mirrors .....	49
Elderly Walkers.....	49
Wearable Monitors.....	50
Home Telemetry Monitors.....	51
Telehomecare.....	52
Mobile Phone-based Technologies .....	52
Bluetooth.....	53
ZigBee.....	53
Signal Transmission via Human Skin .....	54
Current Commercial Status .....	54
Suppliers .....	54
<i>TABLE 5 DEVELOPERS AND SUPPLIERS OF AUTOMATED HOME MONITORING AND TELEMETRY SOLUTIONS</i> .....	55

TELEHEALTH KIOSKS.....	55
Objectives.....	55
Technologies.....	56
Commercial Status.....	57
Suppliers.....	57
<i>TABLE 6 SUPPLIERS OF TELEHEALTH KIOSKS.....</i>	<i>57</i>
AUTOMATED EYE EXAMINATION DEVICES.....	57
Objectives.....	58
Technologies.....	58
Automated Ophthalmic Instruments.....	58
Autorefractors.....	58
Autokeratometers.....	58
Aberrometers.....	59
Eye Health Kiosk.....	59
Suppliers.....	60
<i>TABLE 7 DEVELOPERS AND SUPPLIERS OF AUTOMATED EYE</i>	
<i>HEALTHCARE SOLUTIONS.....</i>	<i>60</i>
Current Commercial Status.....	60
AUTOMATED DRUG TESTING.....	61
Objectives.....	62
Technologies.....	62
Analytical Technologies.....	62
<i>FIGURE 13 DRUG TESTS BY TYPE OF TEST, 2010 (PERCENT OF</i>	
<i>ALL TESTS BY VALUE).....</i>	<i>63</i>
Test Matrices.....	64
Eye Tracking Systems.....	64
Laboratory vs. Point-of-collection Analysis.....	64
Commercial Status.....	65
Suppliers.....	65
<i>TABLE 8 DEVELOPERS AND SUPPLIERS OF AUTOMATED DRUG</i>	
<i>TESTING EQUIPMENT.....</i>	<i>66</i>
MARKETS.....	66
<i>TABLE 9 U.S. MARKET FOR AUTOMATED HEALTH ASSESSMENT</i>	
<i>AND MONITORING SYSTEMS BY TYPE OF SYSTEM, THROUGH</i>	
<i>2016 (\$ MILLIONS).....</i>	<i>66</i>
<i>FIGURE 14 AUTOMATED HEALTH MONITORING AND</i>	
<i>ASSESSMENT MARKET PRODUCT SEGMENTS, 2010–2016 (%).....</i>	<i>67</i>
WEARABLE MONITORS.....	68
<i>TABLE 10 HOME MONITORING AND TELEMETRY SALES,</i>	
<i>THROUGH 2016 (\$ MILLIONS).....</i>	<i>68</i>
Home Telemetry Monitors.....	68
<i>TABLE 11 SALES OF HOME TELEMETRY MONITORS, THROUGH</i>	
<i>2016 (\$ MILLIONS).....</i>	<i>68</i>
TELEHEALTH KIOSKS.....	69

<i>TABLE 12 TELEHEALTH KIOSK SALES AND LEASE REVENUES, 2016 (NEW UNITS/\$)</i> .....	69
AUTOMATED EYE HEALTHCARE TECHNOLOGIES .....	70
<i>TABLE 13 U.S. MARKET FOR AUTOMATED DIAGNOSTIC OPHTHALMIC EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	70
AUTOMATED DRUG TESTING.....	71
<i>FIGURE 15 AUTOMATED TEST EQUIPMENT SHARE OF DRUG TESTING MARKET, 2010 (%)</i> .....	71
<i>FIGURE 16 DRUG ABUSE VERSUS THERAPEUTIC DRUG TESTING SHARES OF AUTOMATED DRUG TESTING EQUIPMENT MARKET, 2010 (%)</i> .....	72
<i>TABLE 14 U.S. MARKET FOR AUTOMATED DRUG TESTING SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	73
CHAPTER SIX: AUTOMATED IMAGING AND IMAGE ANALYSIS .....	74
SUMMARY.....	74
<i>FIGURE 17 TRENDS IN THE U.S. MARKET FOR AUTOMATED MEDICAL IMAGING TECHNOLOGIES, 2010–2016 (\$ MILLIONS)</i> .....	74
<i>FIGURE 17 (CONTINUED)</i> .....	75
TECHNOLOGIES AND PRODUCTS .....	75
AUTOMATED RADIOGRAPHY AND FLUOROSCOPY.....	75
Objectives.....	75
Technologies.....	76
Automated Radiography.....	76
Automated Fluoroscopy .....	76
CT fluoroscopy .....	77
AUTOMATED WHOLE-BREAST ULTRASOUND.....	77
COMPUTER-AIDED DETECTION .....	78
AUTOMATED MICROSCOPY .....	78
Automated Microscopy (Continued).....	79
AUTOMATED SKIN CANCER DETECTION.....	80
Commercial Status .....	81
Suppliers .....	81
<i>TABLE 15 DEVELOPERS AND SUPPLIERS OF AUTOMATED IMAGING TECHNOLOGIES</i> .....	81
<i>TABLE 15 (CONTINUED)</i> .....	82
ENDOSCOPIC CAPSULES.....	82
Objectives.....	83
Technologies.....	83
Current Commercial Status.....	83
Suppliers .....	84
<i>TABLE 16 CAPSULE ENDOSCOPY SUPPLIERS</i> .....	84
MARKETS.....	84
<i>TABLE 17 U.S. MARKET FOR AUTOMATED IMAGING SYSTEMS BY TYPE OF SYSTEM, THROUGH 2016 (\$ MILLIONS)</i> .....	84

<i>FIGURE 18 AUTOMATED IMAGING MARKET PRODUCT</i>	
<i>SEGMENTS, 2010-2016 (%).....</i>	<i>85</i>
AUTOMATED RADIOGRAPHY AND FLUOROSCOPY.....	86
<i>TABLE 18 U.S. MARKET FOR AUTOMATED RADIOGRAPHY AND</i>	
<i>FLUOROSCOPY SYSTEMS BY TYPE OF SYSTEM, THROUGH 2016</i>	
<i>(\$ MILLIONS).....</i>	<i>86</i>
Automated Radiography .....	86
<i>TABLE 19 U.S. MARKET FOR AUTOMATED RADIOGRAPHY</i>	
<i>SYSTEMS, THROUGH 2016 (\$ MILLIONS).....</i>	<i>87</i>
Fluoroscopy .....	87
<i>TABLE 20 U.S. MARKET FOR AUTOMATED FLUOROSCOPY</i>	
<i>SYSTEMS, THROUGH 2016 (\$ MILLIONS).....</i>	<i>87</i>
CAD.....	87
<i>TABLE 21 U.S. MARKET FOR CAD SYSTEMS, THROUGH 2016 (\$</i>	
<i>MILLIONS).....</i>	<i>88</i>
AUTOMATED WHOLE BREAST ULTRASOUND.....	89
<i>TABLE 22 U.S. MARKET FOR AUTOMATED WHOLE BREAST</i>	
<i>ULTRASOUND SYSTEMS, THROUGH 2016 (\$ MILLIONS).....</i>	<i>89</i>
AUTOMATED MICROSCOPY .....	89
<i>TABLE 23 U.S. MARKET FOR AUTOMATED MICROSCOPY</i>	
<i>SYSTEMS, THROUGH 2016 (\$ MILLIONS).....</i>	<i>90</i>
AUTOMATED SKIN CANCER DETECTION.....	90
<i>TABLE 24 U.S. MARKET FOR AUTOMATED SKIN CANCER</i>	
<i>DETECTION SYSTEMS, THROUGH 2016 (\$ MILLIONS).....</i>	<i>91</i>
CAPSULE ENDOSCOPY .....	91
<i>TABLE 25 U.S. MARKET FOR CAPSULE ENDOSCOPY SYSTEMS,</i>	
<i>THROUGH 2016 (\$ MILLIONS).....</i>	<i>91</i>
CHAPTER SEVEN: AUTOMATED PRESCRIPTION FORMULATION AND	
DISPENSING: TECHNOLOGIES, PRODUCTS, AND MARKETS .....	92
SUMMARY.....	92
<i>FIGURE 19 TRENDS IN THE U.S. MARKET FOR AUTOMATED</i>	
<i>PRESCRIPTION FORMULATION AND DISPENSING</i>	
<i>TECHNOLOGIES, 2010–2016 (\$ MILLIONS) .....</i>	<i>92</i>
OBJECTIVES.....	93
TECHNOLOGIES AND PRODUCTS .....	93
PACKAGING MACHINES .....	93
Tablet Counters .....	93
Unit-Dose or Blister Pack Repackaging and Dispensing	
Systems.....	93
INTRAVENOUS COMPOUNDERS.....	94
DISPENSING MACHINES .....	94
Centralized Dispensing Systems .....	94
Decentralized Dispensing Systems.....	94
CURRENT COMMERCIAL STATUS.....	95

SUPPLIERS .....	95
<i>TABLE 26 SUPPLIERS OF AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS</i> .....	96
MARKETS.....	96
<i>TABLE 27 U.S. MARKET FOR AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	96
<i>FIGURE 20 AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING PRODUCT SEGMENTS, 2010-2016 (%)</i> .....	97
HOSPITAL/INPATIENT SYSTEMS.....	97
<i>TABLE 28 U.S. MARKET FOR HOSPITAL/INPATIENT AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	98
PHARMACY/OUTPATIENT SYSTEMS.....	98
<i>TABLE 29 U.S. MARKET FOR PHARMACY/OUTPATIENT AUTOMATED PRESCRIPTION FORMULATION AND DISPENSING SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	98
CHAPTER EIGHT: AUTOMATED THERAPEUTIC (NONSURGICAL) PROCEDURES: TECHNOLOGIES, PRODUCTS, AND MARKETS .....	
SUMMARY.....	99
<i>FIGURE 21 TRENDS IN THE U.S. MARKET FOR AUTOMATED NONSURGICAL THERAPEUTIC DEVICES, 2010–2016 (\$ MILLIONS)</i> .....	99
TECHNOLOGIES AND PRODUCTS .....	100
AUTOMATED DEFIBRILLATORS .....	100
Objectives.....	100
Technologies.....	100
Portable Automated Defibrillators.....	100
Wearable Defibrillators .....	100
Implantable Defibrillators.....	101
Current Commercial Status .....	102
Suppliers .....	102
<i>TABLE 30 AUTOMATED DEFIBRILLATOR MANUFACTURERS</i> .....	102
AUTOMATED MEDICATION DELIVERY SYSTEMS .....	103
Objectives.....	103
Technologies.....	103
Implantable Drug Pumps .....	103
Wearable Drug Pumps.....	104
Wearable Drug ... (Continued) .....	105
Current Commercial Status .....	106
Suppliers .....	106
<i>TABLE 31 AUTOMATED MEDICATION DELIVERY SYSTEM SUPPLIERS</i> .....	106
MARKETS.....	106

<i>TABLE 32 U.S. MARKET FOR AUTOMATED NONSURGICAL THERAPEUTIC DEVICES, THROUGH 2016 (\$ MILLIONS)</i> .....	107
<i>FIGURE 22 AUTOMATED NONSURGICAL THERAPEUTIC DEVICE SEGMENTS (%)</i> .....	107
<i>FIGURE 22 (CONTINUED)</i> .....	108
AUTOMATED DEFIBRILLATORS .....	108
<i>TABLE 33 U.S. MARKET FOR AUTOMATED DEFIBRILLATORS, THROUGH 2016 (\$ MILLIONS)</i> .....	108
Portable Automated Defibrillators .....	108
<i>TABLE 34 U.S. MARKET FOR PORTABLE AUTOMATED DEFIBRILLATORS, THROUGH 2016 (\$ MILLIONS)</i> .....	109
Implanted Cardioverter Defibrillators .....	109
<i>TABLE 35 U.S. MARKET FOR IMPLANTED CARDIOVERTER DEFIBRILLATORS, THROUGH 2016 (\$ MILLIONS)</i> .....	109
AUTOMATED MEDICATION DELIVERY SYSTEMS .....	110
<i>TABLE 36 U.S. MARKET FOR AUTOMATED MEDICATION DELIVERY SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	111
Wearable Systems .....	111
<i>TABLE 37 U.S. MARKET FOR WEARABLE AUTOMATED MEDICATION DELIVERY SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	111
Implanted Systems .....	112
<i>TABLE 38 U.S. MARKET FOR IMPLANTED AUTOMATED MEDICATION DELIVERY SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	112
 CHAPTER NINE: MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGICAL DEVICES: TECHNOLOGIES, PRODUCTS, AND MARKETS.....	
SUMMARY.....	113
<i>FIGURE 23 TRENDS IN THE U.S. MARKET FOR AUTOMATED MEDICAL IMAGING TECHNOLOGIES, 2010–2016 (\$ MILLIONS)</i> .....	113
TECHNOLOGIES AND PRODUCTS .....	114
SURGICAL PLANNERS AND SIMULATORS .....	114
Objectives.....	114
Technologies.....	114
Simulation of Actions and Force Feedback Reactions.....	115
Emerging Technologies.....	116
Web-based Surgical Simulators.....	116
Virtual Reality Simulators.....	116
Current Commercial Status.....	117
Suppliers .....	117
<i>TABLE 39 STANDALONE SURGICAL PLANNERS AND SIMULATORS</i> ....	118
SURGICAL NAVIGATION SYSTEMS .....	118
Technologies.....	118



Imaging Technologies .....	119
Multi-modal imaging .....	119
Fluoroscopic Imaging.....	119
Video-enhanced Imagery.....	120
Microscopic Imagery .....	120
Endoscopic Imagery .....	120
Dynamic (Interventional) Imaging.....	121
Compact MRI Scanners.....	122
Intra-operative CT .....	122
Intra-operative Ultrasound .....	123
Tracking Technologies .....	123
Optical Tracking.....	123
Electromagnetic Tracking .....	124
Display Technologies .....	124
Virtual and Augmented Reality.....	124
Heads-up Displays .....	124
Suppliers .....	125
<i>TABLE 40 SURGICAL NAVIGATION SYSTEM SUPPLIERS .....</i>	<i>125</i>
SURGICAL ROBOTS .....	125
Objectives .....	126
Technologies.....	126
Robotically Assisted Micro-manipulation .....	126
Steady-hand Systems .....	126
Robotic “Wrists” and Other Dexterity	
Enhancements .....	127
Pre-programmed Robots .....	127
Constraint Robots .....	128
Voice Control .....	128
Other Emerging Technologies.....	129
New Robotic Arm Designs .....	129
Remote Surgery.....	129
Microbots .....	130
Suppliers .....	130
<i>TABLE 41 SUPPLIERS AND DEVELOPERS OF SURGICAL ROBOTICS... 130</i>	
<i>TABLE 41 (CONTINUED).....</i>	<i>131</i>
INTELLIGENT OPERATING ROOMS AND RELATED	
EQUIPMENT .....	131
Description .....	131
Technologies.....	131
Data Routing .....	132
User Interface .....	132
Open System Architectures.....	132
Suppliers .....	132

<i>TABLE 42 SUPPLIERS OF INTELLIGENT OPERATING ROOM SOLUTIONS AND COMPONENTS</i> .....	133
MARKETS.....	133
<i>TABLE 43 U.S. MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGERY MARKET BY TYPE OF EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	134
<i>FIGURE 24 U.S. MEDICAL ROBOTICS AND COMPUTER-ASSISTED SURGERY MARKET SHARES BY TYPE OF EQUIPMENT, 2010 VERSUS 2016 (PERCENT OF TOTAL SALES)</i> .....	135

CHAPTER TEN: AUTOMATED LABORATORY TESTING AND ANALYSIS: TECHNOLOGIES, PRODUCTS, AND MARKETS .....	136
SUMMARY.....	136
<i>FIGURE 25 TRENDS IN THE U.S. MARKET FOR AUTOMATED CLINICAL LABORATORY SYSTEMS, 2010–2016 (\$ MILLIONS)</i> .....	136
<i>FIGURE 25 (CONTINUED)</i> .....	137
TECHNOLOGIES AND PRODUCTS .....	137
OBJECTIVES.....	137
TECHNOLOGIES .....	138
Central Laboratory Systems .....	138
Total Laboratory Automation.....	138
Modular Systems .....	138
Sample Processing .....	139
Quality Inspection.....	139
Standardized Interfaces .....	139
Point-of-care Testing Systems.....	139
COMMERCIAL STATUS .....	140
SUPPLIERS .....	140
<i>TABLE 44 SUPPLIERS OF AUTOMATED LABORATORY TESTING AND ANALYSIS SYSTEMS</i> .....	140
MARKETS.....	141
SUMMARY .....	141
<i>TABLE 45 U.S. AUTOMATED LABORATORY TESTING AND ANALYSIS MARKET BY TYPE OF EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	141
<i>FIGURE 26 AUTOMATED LABORATORY TESTING AND ANALYSIS PRODUCT SEGMENTS, 2010-2016 (%)</i> .....	142
CENTRAL LABORATORY SYSTEMS .....	142
<i>TABLE 46 U.S. AUTOMATED CENTRAL LABORATORY TESTING AND ANALYSIS MARKET BY TYPE OF EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	143
POINT-OF-CARE TESTING SYSTEMS.....	143
<i>TABLE 47 U.S. AUTOMATED POINT-OF-CARE TESTING AND ANALYSIS MARKET BY TYPE OF EQUIPMENT, THROUGH 2016 (\$ MILLIONS)</i> .....	143

CHAPTER ELEVEN: AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING: TECHNOLOGIES, PRODUCTS, AND MARKETS .....	144
SUMMARY .....	144
<i>FIGURE 27 TRENDS IN THE U.S. MARKET FOR AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING SYSTEMS, 2010–2016 (\$ MILLIONS)</i> .....	144
<i>FIGURE 27 (CONTINUED)</i> .....	145
TECHNOLOGIES AND PRODUCTS .....	145
AUTOMATED HOSPITAL PICKUP AND DELIVERY .....	145
Objectives .....	145
Technologies .....	145
Pneumatic Tubes .....	145
Automated Guided Vehicles .....	146
Commercial Status .....	147
Suppliers .....	147
<i>TABLE 48 SUPPLIERS OF AUTOMATED HOSPITAL PICKUP AND DELIVERY SYSTEMS</i> .....	147
<i>TABLE 48 (CONTINUED)</i> .....	148
HOSPITAL ASSET/PATIENT/STAFF TRACKING SYSTEMS .....	148
Objectives .....	148
Technologies .....	149
Active RFID .....	149
Wi-Fi .....	150
Hybrid Systems .....	150
Sensor Tags .....	150
Real-time Location Systems .....	151
Commercial Status .....	151
Suppliers .....	151
<i>TABLE 49 SUPPLIERS OF HOSPITAL EQUIPMENT/PATIENT/STAFF/TRACKING SYSTEMS</i> .....	151
MARKETS .....	152
SUMMARY .....	152
<i>TABLE 50 U.S. MARKET FOR AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING SYSTEMS, THROUGH 2016</i> .....	152
<i>FIGURE 28 AUTOMATED HEALTHCARE LOGISTICS, RESOURCE AND PERSONNEL TRACKING SYSTEMS SEGMENTS, 2010-2016 (%)</i> .....	153
AUTOMATED HOSPITAL PICKUP AND DELIVERY SYSTEMS .....	153
<i>TABLE 51 U.S. MARKET FOR HOSPITAL AUTOMATED LOGISTICS SYSTEMS, THROUGH 2016 (\$ MILLIONS)</i> .....	154
Pneumatic Tubes .....	154

TABLE 52 U.S. MARKET FOR HOSPITAL PNEUMATIC TUBE SYSTEMS, THROUGH 2016 (\$ MILLIONS).....	154
AGVs .....	154
TABLE 53 U.S. MARKET FOR HOSPITAL AGV SYSTEMS, THROUGH 2016 (\$ MILLIONS).....	155
HOSPITAL PATIENT/STAFF/EQUIPMENT TRACKING .....	155
TABLE 54 U.S. MARKET FOR HOSPITAL RTLS SYSTEMS THROUGH 2016 (\$ MILLIONS).....	155
CHAPTER TWELVE: AUTOMATED MEDICAL (NONSURGICAL) PROFESSIONAL TRAINING: TECHNOLOGIES, PRODUCTS, AND MARKETS .....	
SUMMARY.....	156
FIGURE 29 TRENDS IN THE U.S. MARKET FOR AUTOMATED MEDICAL (NONSURGICAL) TRAINING DEVICES, 2010–2016 (\$ MILLIONS).....	156
FIGURE 29 (CONTINUED) .....	157
OBJECTIVES.....	157
TECHNOLOGIES AND PRODUCTS .....	157
Human Patient Simulators .....	157
Virtual Reality Trainers .....	158
Team Training .....	159
Commercial Status .....	159
Suppliers .....	159
MARKETS .....	159
TABLE 55 U.S. MARKET FOR AUTOMATED MEDICAL (NONSURGICAL) TRAINING SYSTEMS, THROUGH 2016 (\$ MILLIONS).....	160
APPENDIX A: COMPANY PROFILES .....	
ACROBOT COMPANY LTD. (SURGICAL PLANNERS, NAVIGATORS, ROBOTS).....	161
AEROSCOUT, INC. ....	161
ASTERES, INC. (AUTOMATED PRESCRIPTION FULFILLMENT).....	162
AWAREPOINT CORP. ....	162
BECKMAN COULTER, INC. ....	162
BRAINLAB AG (SURGICAL NAVIGATION SYSTEMS).....	163
CARD GUARD AG (HOME MONITORING AND TELEMETRY).....	164
CENTRAK INC. ....	164
CLEARCOUNT MEDICAL SOLUTIONS, INC. ....	165
COMPUTERIZED SCREENING INC. (TELEHEALTH KIOSKS).....	165
CURLIN MEDICAL, INC. ....	166
EKAHAU INC. ....	166
ESCREEN INC. (AUTOMATED DRUG TESTING SYSTEMS) .....	166
GE HEALTHCARE (SURGICAL NAVIGATION SYSTEMS).....	167

GIVEN IMAGING LTD. ....	167
ICAD INC. (COMPUTER-ASSISTED DETECTION AND DIAGNOSIS).....	168
INFIMED INC.....	168
INSULET CORP. ....	169
INTUITIVE SURGICAL, INC. (SURGICAL ROBOTICS).....	169
IRIS INTERNATIONAL, INC. ....	170
MEDICAL EDUCATION TECHNOLOGIES, INC. ....	170
MICROCHIPS INC. ....	171
NOVX SYSTEMS INC. (AUTOMATED DRUG TESTING).....	171
PARATA SYSTEMS LLC ....	172
PEVCO SYSTEMS INTERNATIONAL INC. ....	172
PHILIPS HEALTHCARE (AUTOMATED MEDICAL IMAGING) ....	172
QUIQMEDS, INC. (AUTOMATED PRESCRIPTION FULFILLMENT) ....	173
RF COMPANY LTD.....	173
ROBOTIC SURGICAL TECH, INC. (SURGICAL ROBOTICS).....	173
SIEMENS HEALTHCARE.....	174
SIMSURGERY (SURGICAL SIMULATORS) ....	174
STREETIME TECHNOLOGIES (AUTOMATED DRUG TESTING) .....	175
STRYKER CORP. (NAVIGATION SYSTEMS, INTELLIGENT OPERATING ROOMS).....	175
T+ MEDICAL AMERICAS (HOME MONITORING AND TELEMETRY) .....	176
U-SYSTEMS, INC. (AUTOMATED IMAGING SYSTEMS) .....	176
VERSUS TECHNOLOGY, INC.....	177
ZOLL MEDICAL CORP.....	177
APPENDIX B: PATENT ANALYSIS .....	178
<i>FIGURE 30 U.S. MEDICAL AUTOMATION PATENTS BY TYPE OF     TECHNOLOGY (PERCENT OF PATENTS ISSUED THROUGH AUG.     1, 2011)</i> .....	178
<i>FIGURE 30 (CONTINUED)</i> .....	179