

FOREWORD .....	1
CHAPTER ONE: DIABETES THERAPIES AND DIAGNOSTICS: GLOBAL MARKETS (HLC029C) .....	2
INTRODUCTION .....	2
STUDY GOALS AND OBJECTIVES .....	2
REASONS FOR DOING THE STUDY.....	2
SCOPE OF REPORT.....	3
MARKET ANALYSES AND FORECASTS.....	3
METHODOLOGY.....	3
INTENDED AUDIENCE.....	3
INFORMATION SOURCES .....	4
ANALYST CREDENTIALS .....	4
RELATED REPORTS .....	4
BCC ONLINE SERVICES .....	5
DISCLAIMER.....	5
SUMMARY.....	5
THE DIABETES MARKET .....	5
LEADING COMPANIES .....	6
<i>TABLE 1 DIABETES MARKET BREAKDOWN BY PRODUCT GROUPS,     THROUGH 2015 (\$ BILLIONS)</i> .....	6
<i>FIGURE 1 DIABETES MARKET EVOLUTION BY PRODUCT GROUP,     2010 AND 2015 (\$ BILLIONS)</i> .....	7
DIABETES BASICS.....	7
A GROWING MARKET.....	8
DRUG TREATMENT OF DIABETES .....	8
INSULIN .....	8
ORAL ANTIDIABETIC DRUGS .....	9
THE PHARMACEUTICAL DIABETES MARKET .....	9
INSULIN ADMINISTRATION DEVICES.....	9
MEDICAL DEVICES FOR DIABETES .....	10
<i>TABLE 2 TOTAL DIABETES MARKET (\$ BILLIONS)</i> .....	11
REGIONAL SEGMENTATION.....	11
<i>TABLE 3 ADULT DIABETES MARKET, BY REGION (MILLIONS/%)</i> .....	11
MARKET GROWTH .....	11
THE DIABETES INDUSTRY .....	12
PHARMACEUTICAL COMPANIES.....	12
MEDICAL DEVICE COMPANIES.....	13
DIABETES THERAPIES .....	13
INSULIN .....	13
History.....	14
Bovine and Porcine Insulin .....	15
Humanized Insulin.....	15
COMPANIES SUPPLYING INSULIN.....	16

Eli Lilly .....	16
Sanofi Aventis.....	16
Novo Nordisk .....	16
Some Other Suppliers .....	17
Wockhardt Limited: India .....	17
BioconB: India.....	17
Shreya Life Sciences: India .....	17
Diosynth: the Netherlands .....	17
<i>TABLE 4 MAJOR BRANDS OF INSULIN</i> .....	18
INSULIN DELIVERY .....	18
Syringes.....	18
INSULIN SYRINGE MANUFACTURERS.....	19
Becton Dickinson .....	19
Owen Mumford .....	19
Terumo .....	19
B. Braun.....	20
Pens .....	20
<i>TABLE 5 INSULIN PENS</i> .....	21
MANUFACTURERS OF INSULIN PENS.....	21
Novo Nordisk .....	21
Owen Mumford .....	22
Other Makers.....	22
INJECTORS .....	23
INJECTOR MANUFACTURERS .....	23
Activa Brand Products .....	23
Antares Pharma .....	24
Bioject.....	24
MediCool, Inc .....	24
Owen Mumford .....	24
Palco Labs, Inc.....	24
Rosch AG Medizintechnik .....	25
INHALED INSULIN.....	25
OTHER INSULIN DELIVERY APPROACHES .....	26
Oral-Lyn.....	26
Oramed.....	26
Medingo Micro-pump Patch .....	26
INSULIN PUMPS .....	27
The Infusion Set .....	28
Candidates for Pump Therapy .....	29
COMPANIES SUPPLYING INSULIN PUMPS .....	30
Animas Corporation .....	30
Sooil Development Company .....	30
Medtronic MiniMed .....	30
Nipro Diabetes Systems .....	31

Roche Disetronic .....	31
Smiths Medical .....	31
Insulet .....	31
<i>TABLE 6 INSULIN PUMPS</i> .....	32
Problems with Pumps or Users? .....	32
Problems with Pumps or Users? (Continued).....	33
 CHAPTER TWO: MEDICAL IMAGING REAGENTS AND ANALYSIS	
EQUIPMENT (HLC040C).....	34
INTRODUCTION .....	34
STUDY OBJECTIVES .....	34
REASONS FOR DOING THIS STUDY .....	34
INTENDED AUDIENCE.....	35
SCOPE OF THE STUDY .....	35
METHODOLOGY.....	35
INFORMATION SOURCES .....	35
ABOUT THE AUTHOR .....	35
RELATED BCC RESEARCH REPORTS.....	36
SUMMARY.....	36
SUMMARY (CONTINUED) .....	37
<i>TABLE 7 GLOBAL REVENUE OF THE IMAGING MARKET (IMAGING REAGENTS AND SYSTEMS), THROUGH 2014 (\$ MILLIONS)</i> .....	38
<i>FIGURE 2 GLOBAL REVENUE OF THE IMAGING MARKET (IMAGING REAGENTS AND SYSTEMS), 2007-2014 (\$ MILLIONS)</i> .....	38
WHAT IS MEDICAL IMAGING .....	39
HISTORY OF MEDICAL IMAGING .....	39
<i>TABLE 8 HISTORY OF MEDICAL IMAGING, 1895-1993</i> .....	39
TYPES OF MEDICAL IMAGING .....	39
X-RAY IMAGING .....	40
Applications of X-ray in Medicine.....	40
<i>TABLE 9 ADVANTAGES AND DISADVANTAGES OF X-RAY IMAGING</i> .....	41
ULTRASOUND .....	41
Applications of Ultrasound .....	41
<i>TABLE 10 ADVANTAGES AND DISADVANTAGES OF ULTRASOUND</i> .....	42
MAGNETIC RESONANCE IMAGING .....	42
Applications of Magnetic Resonance Imaging.....	43
<i>TABLE 11 ADVANTAGES AND DISADVANTAGES OF MAGNETIC RESONANCE IMAGING</i> .....	43
COMPUTED TOMOGRAPHY.....	44
Applications of Computed Tomography.....	44
<i>TABLE 12 ADVANTAGES AND DISADVANTAGES OF COMPUTED TOMOGRAPHY</i> .....	45
POSITRON EMISSION TOMOGRAPHY .....	45
Applications of Positron Emission Tomography .....	46

<i>TABLE 13 ADVANTAGES AND DISADVANTAGES OF POSITRON EMISSION TOMOGRAPHY</i> .....	46
DIFFERENTIATION BETWEEN VARIOUS IMAGING TECHNIQUES.....	47
<i>TABLE 14 DIFFERENCES BETWEEN CT AND PET</i> .....	47
<i>TABLE 15 DIFFERENCES BETWEEN CT AND MRI</i> .....	47
CONTRAST AGENTS OR IMAGING REAGENTS .....	47
PROPERTIES OF AN IDEAL CONTRAST AGENT.....	48
CLASSIFICATION OF CONTRAST AGENTS BASED ON THEIR PROPERTIES .....	48
Positive Contrast Agents.....	48
Barium.....	48
Iodine-based Contrast Agents .....	49
Negative Contrast Agents .....	49
CLASSIFICATION OF CONTRAST AGENTS BASED ON THE TYPE OF IMAGING TECHNIQUE.....	49
Contrast Agents for X-Ray .....	50
Contrast Agents for Magnetic Resonance Imaging.....	50
Contrast Agents for Ultrasound .....	51
PET Radiopharmaceuticals.....	51
<i>TABLE 16 COMPOUNDS USED IN PET SCAN</i> .....	52
IMAGING EQUIPMENT.....	52
X-RAY IMAGING SYSTEM.....	52
FLUOROSCOPY EQUIPMENT.....	53
COMPUTED TOMOGRAPHY SCANNER .....	53
ULTRASOUND MACHINES.....	54
Bedside Doppler.....	55
Duplex Doppler .....	55
Color Doppler .....	55
Power Doppler .....	55
MAGNETIC RESONANCE IMAGING SYSTEM.....	56
Conventional MRI Units .....	56
Short-bore MRI Units.....	57
Open MRI Units .....	57
Mobile MRI Units .....	57
Dedicated Extremity/Head/Breast MRI units.....	57
POSITRON EMISSION TOMOGRAPHY EQUIPMENT.....	57
 CHAPTER THREE: MEDICAL LASERS: TECHNOLOGIES AND GLOBAL MARKETS (HLC072A) .....	 58
INTRODUCTION .....	58
STUDY BACKGROUND.....	58
GOALS AND OBJECTIVES .....	59
INTENDED AUDIENCE.....	59
SCOPE OF REPORT.....	59

METHODOLOGY.....	60
AUTHOR'S CREDENTIALS .....	61
RELATED BCC RESEARCH .....	61
SUMMARY.....	61
<i>TABLE 17 GLOBAL MARKET FOR MEDICAL LASERS BY END USE, THROUGH 2014 (\$ MILLIONS)</i> .....	62
<i>FIGURE 3 GLOBAL MARKET FOR MEDICAL LASERS BY END USE, 2008-2014 (\$ MILLIONS)</i> .....	62
BASIC CONCEPTS OF MEDICAL LASERS .....	63
LASER PRINCIPLES .....	63
COMPONENTS OF LASERS .....	64
Energy Source.....	64
Lasing Medium .....	64
Optical Resonator .....	65
LASER OPERATION.....	65
Continuous Wave Operation .....	66
Pulsed Operation .....	66
Q-switching .....	66
Mode Locking.....	66
Pulsed Pumping.....	67
HISTORY OF MEDICAL LASERS.....	67
EFFECT OF LASERS ON HUMAN TISSUE .....	68
EFFECT OF LASERS ON HUMAN ... (CONTINUED) .....	69
EFFECT OF LASERS ON HUMAN ... (CONTINUED) .....	70
MEDICAL TREATMENTS USING LASERS.....	71
<i>TABLE 18 COMMON TYPES OF MEDICAL LASER TREATMENTS</i> .....	71
MARKET SIZE AND SEGMENTATION .....	72
OVERALL MARKET SIZE .....	72
<i>FIGURE 4 GLOBAL MARKET TRENDS FOR MEDICAL LASERS, 2008–2014 (\$ MILLIONS)</i> .....	72
End-Use Segments .....	72
<i>TABLE 19 GLOBAL MARKET FOR MEDICAL LASERS BY END USE, THROUGH 2014 (\$ MILLIONS)</i> .....	73
<i>FIGURE 5 GLOBAL MEDICAL LASER END-USE SEGMENTS, 2008- 2014 (%)</i> .....	73
<i>FIGURE 5 (CONTINUED)</i> .....	74
Application Segments.....	74
<i>TABLE 20 GLOBAL MARKET FOR MEDICAL LASERS BY APPLICATION, THROUGH 2014 (\$ MILLIONS)</i> .....	74
Application Segments .....	75
CHAPTER FOUR: MEDICAL MAGNETIC RESONANCE IMAGING (MRI): TECHNOLOGIES AND GLOBAL MARKETS (HLC078A) .....	76
INTRODUCTION .....	76
REASONS FOR DOING THE STUDY.....	76

STUDY GOALS AND OBJECTIVES .....	76
SCOPE OF REPORT .....	77
METHODOLOGIES AND INFORMATION SOURCES .....	77
ANALYST CREDENTIALS .....	77
RELATED BCC REPORTS.....	77
SUMMARY.....	78
<i>TABLE 21 GLOBAL MARKET FOR MRI SYSTEMS BY REGION, THROUGH 2015 (\$ MILLIONS)</i> .....	79
<i>FIGURE 6 GLOBAL MARKET FOR MRI SYSTEMS BY REGION, 2010 AND 2015 (%)</i> .....	79
<i>FIGURE 6 (CONTINUED)</i> .....	80
HISTORY .....	80
MECHANICS OF THE MRI.....	81
MAGNETS.....	81
Resistive Magnets.....	82
Permanent Magnets .....	82
Superconducting Magnets.....	82
Gradient Magnets.....	82
COILS .....	82
Coils for Specific Applications.....	83
Total Imaging Matrix .....	83
REFURBISHED COILS.....	83
<i>TABLE 22 GLOBAL MARKET FOR MRI COILS, THROUGH 2015 (\$ MILLIONS)</i> .....	84
RF TRANSMITTER OR SOLENOID .....	84
SHIELDS .....	84
Magnetic Shielding.....	85
CRYOGENIC LIQUIDS.....	85
CONTRAST AGENTS.....	85
Chelates of Gadolinium.....	86
Iron Oxide .....	86
Manganese Chelates.....	86
<i>TABLE 23 PROJECTED GLOBAL MARKET FOR SALES OF MRI CONTRAST MEDIA, THROUGH 2015 (\$ MILLIONS)</i> .....	87
COMPUTER SYSTEM.....	87
MRI PROCESS.....	87
CONTRAST AGENTS IN MRI .....	88
USES.....	88
TYPES OF MRI SCANS .....	88
BASIC MRI SCANS .....	89
<i>TABLE 24 BASIC MRI SCAN, BY TYPE, WITH APPLICATION</i> .....	89
T <sub>1</sub> -Weighted MRI.....	89
T <sub>2</sub> -Weighted MRI.....	90
T* <sub>2</sub> -Weighted MRI .....	90

Spin-Density-Weighted MRI .....	90
SPECIALIZED MRI SCANS .....	90
<i>TABLE 25 SPECIALIZED MRI SCAN, BY TYPE, WITH APPLICATION</i> .....	<i>91</i>
Diffusion MRI .....	91
Magnetization Transfer MRI .....	91
Fluid Attenuated Inversion Recovery (FLAIR) .....	92
Magnetic Resonance Angiography (MRA) .....	92
Magnetic Resonance Gated Intracranial CSF Dynamics (MR-GILD).....	92
Magnetic Resonance Spectroscopy (MRS) .....	93
FUNCTIONAL MRI (fMRI).....	93
INTERVENTIONAL MRI.....	93
INTRAOPERATIVE MRI .....	93
RADIATION THERAPY SIMULATION.....	94
MAGNETIC RESONANCE GUIDED FOCUSED ULTRASOUND (MRGFUS) .....	94
MULTINUCLEAR IMAGING .....	94
SUSCEPTIBILITY-WEIGHTED IMAGING (SWI).....	94
MRI AND CT ATTRIBUTES.....	94
STRENGTHS/LIMITATIONS OF CT .....	95
STRENGTHS/LIMITATIONS OF MRI.....	95
<i>TABLE 26 STRENGTHS/LIMITATIONS OF MRI</i> .....	<i>96</i>
MRI MARKET STRENGTHS.....	96
SUPERIOR IMAGING FOR SOME SITUATIONS.....	96
CONTINUING EVOLUTION OF MORE POWERFUL EQUIPMENT .....	96
NEW APPLICATIONS FOR EQUIPMENT .....	96
MARKET CHALLENGES .....	97
MATURE MARKET IN DEVELOPED NATIONS.....	97
DIFFERENTIATING PRODUCT CAPABILITIES .....	97
Unit Capabilities .....	97
COMPLEX TECHNOLOGY AND LACK OF PERSONNEL .....	98
LONG SALES AND INSTALLATION CYCLES .....	98
HIGHER COST THAN OTHER TECHNOLOGIES.....	98
COMPETITIVE TECHNOLOGIES .....	98
<i>TABLE 27 ADVANTAGES/DISADVANTAGES OF IMAGING TECHNOLOGIES</i> .....	<i>99</i>
<i>FIGURE 7 PERCENT OF MARKET, BY TYPE OF IMAGING, IN THE U.S., 2010 (%)</i> .....	<i>100</i>

CHAPTER FIVE: MEDICAL DEVICE SENSORS: TECHNOLOGIES AND GLOBAL MARKETS (HLC080A) .....	101
INTRODUCTION .....	101
STUDY GOAL AND OBJECTIVES .....	101
REASONS FOR DOING THE STUDY.....	101

INTENDED AUDIENCE.....	102
SCOPE OF REPORT.....	102
SCOPE OF REPORT (CONTINUED).....	103
SCOPE OF REPORT (CONTINUED).....	104
METHODOLOGY.....	104
INFORMATION SOURCES.....	105
THE ANALYST'S CREDENTIALS.....	105
RELATED BCC RESEARCH REPORTS.....	105
SUMMARY.....	106
<i>TABLE 28 GLOBAL REQUIREMENTS FOR MEDICAL DEVICE SENSORS, THROUGH 2014 (\$ MILLIONS, CLASS II AND CLASS III DEVICES)</i> .....	107
<i>FIGURE 8 GLOBAL MARKET FOR MEDICAL DEVICES SENSORS BY TECHNOLOGY, 2007-2014 (\$ MILLIONS)</i> .....	107
THE MEDICAL SENSORS INDUSTRY IN 2009.....	107
THE MEDICAL SENSORS INDUSTRY ... (CONTINUED).....	108
THREE INDUSTRY-DRIVING TRENDS.....	109
THREE INDUSTRY-DRIVING TRENDS (CONTINUED).....	110
THREE INDUSTRY-DRIVING TRENDS (CONTINUED).....	110
SENSORS USED IN MEDICAL DEVICES.....	110
DIGITAL CONVERSION IS NOW COMPLETE.....	111
SENSORS FOR MEDICAL DEVICES.....	112
TEMPERATURE SENSORS.....	112
POSITION SENSORS.....	113
PRESSURE SENSORS AND TRANSDUCERS.....	113
Pressure Sensors and Transducers (Continued).....	114
CHEMICAL SENSORS.....	114
FORCE AND LOAD SENSORS AND TRANSDUCERS.....	115
Force And Load Sensors And Transducers(Continued).....	115
FLOW SENSORS.....	117
LEVEL SENSORS.....	117
<i>TABLE 29 LEVEL SENSOR TECHNOLOGIES LISTED BY SENSING FUNCTION</i> .....	117
<i>TABLE 29 (CONTINUED)</i> .....	118
SPINTRONICS.....	118
Spintronics (Continued).....	119
CHAPTER SIX: SLEEP AIDS: TECHNOLOGIES AND GLOBAL MARKETS (HLC081A).....	120
INTRODUCTION.....	120
STUDY GOALS AND OBJECTIVES.....	120
REASONS FOR STUDY.....	120
SCOPE OF STUDY.....	120
METHODOLOGY AND INFORMATION SOURCES.....	121
ANALYST CREDENTIALS.....	121



RELATED BCC REPORTS.....	122
SUMMARY.....	122
SUMMARY (CONTINUED) .....	123
SUMMARY (CONTINUED) .....	124
<i>TABLE 30 TOTAL WORLDWIDE MARKET FOR SLEEP AIDS BY PRODUCT TYPE, THROUGH 2014 (\$ MILLIONS).....</i>	<i>125</i>
<i>TABLE 31 WORLDWIDE MARKET FOR SLEEP AIDS: TECHNOLOGIES AND MARKETS BY REGION, 2008-2014 (%).....</i>	<i>126</i>
<i>FIGURE 9 PERCENT OF TOTAL WORLDWIDE MARKET FOR SLEEP AIDS: TECHNOLOGIES AND MARKETS BY REGION, 2014 (%) .....</i>	<i>126</i>
PHYSIOLOGY OF SLEEP .....	126
STAGES OF SLEEP.....	127
NREM Sleep.....	127
Stage 1 .....	127
Stage 2.....	128
Stage 3.....	128
Stage 4.....	128
REM Sleep .....	128
REM Sleep (Continued) .....	129
SLEEP CYCLE.....	130
BIOLOGICAL CLOCK.....	130
FACTORS AFFECTING SLEEP.....	131
COMFORT LEVEL .....	131
ANXIETY AND STRESS .....	131
CULTURAL NORMS .....	131
DRUGS/MEDICATIONS .....	131
ENVIRONMENT.....	132
HORMONES .....	132
LIFESPAN CONSIDERATIONS .....	132
Lifespan Considerations (Continued) .....	133
LIFESTYLE.....	133
NUTRITION/DIET.....	134
ALTERATION IN SLEEP PATTERNS .....	134
INSOMNIA.....	135
Psychological Insomnia .....	135
Idiopathic Insomnia.....	135
Sleep-State Misinterpretation .....	135
NARCOLEPSY/HYPERSOMNIA.....	136
SLEEP APNEA AND SNORING.....	136
PARASOMNIA .....	137
SLEEP DEPRIVATION.....	138
DEMOGRAPHICS .....	138
<i>TABLE 32 WORLD POPULATION BY SELECTED GEOGRAPHICAL REGION, 2008–2050 (MILLIONS).....</i>	<i>139</i>

<i>TABLE 33 ESTIMATED WORLD POPULATION BY AGE AND GEOGRAPHICAL REGION, 2008 (MILLIONS)</i> .....	139
<i>TABLE 33 (CONTINUED)</i> .....	140
<i>TABLE 34 PERCENTAGE OF WORLDWIDE POPULATION OVER 65 BY YEAR AND REGION, 2008–2050 (%)</i> .....	140
<i>FIGURE 10 PERCENTAGE OF WORLDWIDE POPULATION OVER 65 BY YEAR AND REGION, 2008–2050 (%)</i> .....	141
PREVALENCE OF SLEEP APNEA .....	142
<i>TABLE 35 PREVALENCE OF SLEEP APNEA WORLDWIDE BY REGION AND COUNTRY, 2006</i> .....	142
<i>TABLE 35 (CONTINUED)</i> .....	143
<i>TABLE 35 (CONTINUED)</i> .....	144
<i>TABLE 35 (CONTINUED)</i> .....	145
OTHER SLEEP DISORDER STATISTICS .....	145
<i>TABLE 36 U.S. OTHER SLEEP DISORDER STATISTICS 2008</i> .....	145
NARCOLEPSY .....	146
RESTLESS LEG SYNDROME.....	147
SUBSTANCE ABUSE AND SLEEP DISORDERS .....	147
ALTERNATIVE SNORING AIDS.....	148
ALTERNATIVE SNORING AIDS (CONTINUED) .....	149
REIMBURSEMENT .....	150
SLEEP AND THE ELDERLY .....	151
DROWSY DRIVING .....	151
HOME TESTING .....	152
HOME TESTING (CONTINUED).....	153
OTHER SLEEP PRODUCTS .....	154
OBESITY AND SLEEP PROBLEMS.....	155
INNOVATIVE COST-SAVING PROGRAMS .....	156
INNOVATIVE COST-SAVING PROGRAMS (CONTINUED).....	157
 CHAPTER SEVEN: EMERGING MARKETS FOR ADVANCED MEDICAL TECHNOLOGIES (HLC082A) .....	
INTRODUCTION .....	158
STUDY BACKGROUND.....	158
GOALS AND OBJECTIVES .....	158
INTENDED AUDIENCE.....	159
SCOPE OF REPORT.....	159
INFORMATION SOURCES AND METHODOLOGY .....	160
ANALYST CREDENTIALS .....	160
RELATED BCC REPORTS.....	161
SUMMARY.....	161
<i>TABLE 37 EMERGING MARKETS FOR ADVANCED MEDICAL TECHNOLOGIES, BY TYPE OF TECHNOLOGY, THROUGH 2014 (\$ MILLIONS)</i> .....	162

<i>FIGURE 11 EMERGING MARKETS FOR ADVANCED MEDICAL TECHNOLOGIES, BY TYPE OF TECHNOLOGY, 2008-2014 (\$ MILLIONS)</i> .....	162
EMERGING MARKETS.....	163
<i>TABLE 38 BIG EMERGING MARKETS BASIC DEMOGRAPHIC AND ECONOMIC CHARACTERISTICS, 2008</i> .....	164
<i>TABLE 39 BIG EMERGING MARKETS' TOTAL HEALTH CARE EXPENDITURES AND PURCHASES OF MEDICAL DEVICES</i> .....	165
<i>TABLE 40 BIG EMERGING MARKETS' PUBLIC VS. PRIVATE SHARES OF TOTAL HEALTH CARE EXPENDITURES, 2006* (% OF TOTAL HEALTH CARE EXPENDITURES)</i> .....	165
ASEAN NATIONS.....	166
Market Demographics and Economics.....	166
<i>TABLE 41 ASEAN NATIONS POPULATION, 2008 (MILLIONS)</i> .....	166
<i>TABLE 42 ASEAN NATIONS ECONOMIES, 2008</i> .....	167
Health Care Sector.....	168
Structure.....	168
<i>FIGURE 12 ASEAN COUNTRIES' PUBLIC HEALTH CARE EXPENDITURES, 2006* (% OF TOTAL NATIONAL HEALTH CARE SPENDING)</i> .....	168
<i>FIGURE 12 (CONTINUED)</i> .....	169
Policy.....	169
Expenditures.....	170
<i>TABLE 43 ASEAN NATIONS HEALTH CARE EXPENDITURES, 2006*</i> .....	170
Market for Medical Equipment and Supplies.....	170
<i>TABLE 44 ASEAN MEDICAL DEVICE MARKET, 2006*</i> .....	171
 CHAPTER EIGHT: GLOBAL MARKETS FOR OPHTHALMIC DEVICES, DIAGNOSTICS AND SURGICAL EQUIPMENT (HLC083A).....	
INTRODUCTION.....	172
STUDY GOALS AND OBJECTIVES.....	172
REASONS FOR DOING THE STUDY.....	172
SCOPE OF REPORT.....	172
METHODOLOGY.....	173
RELATED BCC REPORTS.....	174
ANALYST CREDENTIALS.....	174
SUMMARY.....	174
OPHTHALMIC MARKET: MAJOR MARKETS SUMMARY.....	174
<i>TABLE 45 TOTAL GLOBAL OPHTHALMIC DIAGNOSTIC, DEVICE, AND SURGICAL MARKET, BY SEGMENT, THROUGH 2014 (\$ MILLIONS)</i> .....	175
<i>FIGURE 13 TOTAL GLOBAL OPHTHALMIC DIAGNOSTIC, DEVICE, AND SURGICAL MARKET, BY SEGMENT, 2007-2014 (\$ MILLIONS)</i> .....	176
LEADING MANUFACTURERS.....	176
OVERVIEW OF VISION.....	177

STRUCTURE OF THE EYE.....	177
PATHOLOGY OF VISION.....	178
MARKET SIZE AND GROWTH .....	179
<i>TABLE 46 TOTAL GLOBAL MARKET FOR CONTACT LENSES, BY MARKET SEGMENT, THROUGH 2014 (\$ MILLIONS)</i> .....	180
<i>FIGURE 14 TOTAL GLOBAL MARKET FOR CONTACT LENSES, BY MARKET SEGMENT, 2007-2014 (\$ MILLIONS)</i> .....	181
SOFT CONTACT LENS MARKET BY PRODUCT TYPE .....	181
<i>TABLE 47 GLOBAL MARKET FOR SOFT CONTACT LENSES BY PRODUCT TYPE, THROUGH 2014 (\$ MILLIONS)</i> .....	182
<i>FIGURE 15 GLOBAL MARKET FOR SOFT CONTACT LENSES BY PRODUCT TYPE, 2007-2014 (\$ MILLIONS)</i> .....	183
MARKETS BY WORLD REGION .....	183
<i>TABLE 48 GLOBAL MARKET FOR CONTACT LENSES BY GEOGRAPHIC REGION, THROUGH 2014 (\$ MILLIONS)</i> .....	184
<i>FIGURE 16 GLOBAL MARKET FOR CONTACT LENSES BY GEOGRAPHIC REGION, 2009 AND 2014 (\$ MILLIONS)</i> .....	185
COMPETITIVE STRUCTURE AND MARKET SHARE .....	185
<i>TABLE 49 COMPETITIVE MARKET SHARE FOR CONTACT LENSES BY MANUFACTURERS' REVENUES, 2009 (\$ MILLIONS/%)</i> .....	186
<i>FIGURE 17 COMPETITIVE MARKET SHARE FOR CONTACT LENSES BY MANUFACTURERS' REVENUES, 2009 (\$ MILLIONS)</i> .....	187