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The World Market for Cardiovascular Diagnostics

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Abstracts

This report provides the reader with an overview of the global cardiac diagnostics industry and the trends driving growth. Segments within the cardiac diagnostic market include:

Electrocardiography including ECG testing, stress testing, Holter monitoring, event monitoring and implantable loop.

Cardiac imaging including non-invasive X-Ray, MRI, CT, ultrasound, and nuclear cardiography; and invasive /cardiac catheterization/angiography, intravascular ultrasound, optical coherence technology and electrophysiology.

Cardiac point-of-care including cholesterol testing and coagulation testing

Cardiac markers

Cardiac contrast agents and radiopharmaceuticals

For each of these segments, market size and forecast, along with compound annual growth rate is provided. Also included in the report are statistics influencing the industry, incidence of cardiac and related diseases worldwide, demographics, life expectancy, and company strategies. Information is presented as a global market. A market summary includes a total market analysis. Also included is a competitive analysis of leading cardiac diagnostic providers.

Economic conditions in several markets within the global cardiac diagnostics market remained challenging in 2012. Demand for cardiovascular diagnostics slowed during the historical period due to a weakened global economy, cost cutting measures and

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healthcare reform issues. However, demographics worldwide and an aging world society remain primary factors in growth. By 2020, 16 percent of the US population will be over the age of 65, up from 13% in 2010. People are also living longer, needing more health care, further fueling the market. In 1980, the US life expectancy at birth was 74 years, today the average American lives to be 78 years old.

The global cardiac diagnostic industry is a diverse and highly competitive market. It is anticipated that provider demand for cardiac diagnostic products and services will continue to rise providing opportunities for both existing market participants and emerging market participants. Manufacturers should look for ways to distinguish themselves in the marketplace by keeping abreast of key market drivers, restraints, and trends that are affecting the market and the economy as a whole. More than ever before, manufacturers are facing survival challenges in today's marketplace while the need for innovative and safe products continues to grow.

Companies profiled in this report include:

Abbott Diagnostics

Acusphere

Alere

Analogic Corp

Bayer Healthcare

Bracco SpA

Cardinal Health

CardioDX

C.R. Bard

Danaher Corporation

dpiX

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FluoroPharma Medical

GE Healthcare

Johnson & Johnson

King Pharmaceuticals

Lantheus Medical Imaging

LipScience

Medison America

Molecular Insight Pharmaceuticals

Nanosphere

PerkinElmer

Philips Healthcare

Roche Diagnostics

Shimadzu Corp

Siemens Medical Solutions

St Jude Medical

Terumo Medical

TomTec Imaging Systems

Trixell

Vascular Solutions

Vermillion

Volcano

Some of these companies are high stakes players in the market and control considerable market share while others are small or niche players that provide a valuable product to the global cardiac diagnostic arena. All are equally important to the market as a whole.

The information for this report was gathered using both primary and secondary research including comprehensive research of secondary sources such as company literature, databases, investment reports, and medical and business journals. Telephone interviews and email correspondence were the primary method of gathering information. For the purpose of this study, Kalorama Information conducted interviews with more than 21 key industry officials, consultants, health care providers, and government personnel. These sources were the primary basis in gathering information specifically relating to revenue and market share data presented in this report. Additional interviews were completed with relevant company representatives including marketing directors, division managers, and product representatives.

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Coronary vascular resistance has two major determinants: (1) coronaryartery diameter and (2) the degree of extra compression due to myocardialcontraction. Coronary artery diameter is continuously adjusted to maintain bloodflow at a level adequate for myocardial demands. Autoregulation is the term used todescribe the intrinsic ability of the arteries to adjust blood flow according to tissueneeds. Vasodilation occurs in response to increased tissue metabolism, whereasdecreased metabolic activity results in a decreased vessel diameter.

The mechanism of autoregulation can be explained by the metabolichypothesis, which proposes that increase metabolism results in a buildup ofvasodilatory chemicals in the vessel. Smooth muscle circling the vessel relaxes inresponse to the presence of the chemicals increasing vessel diameter. Severalvasodilation substances have been proposed, including potassium ions, hydrogenions, carbon dioxide, nitric oxide, prostaglandins, and adenosine.

The endothelialcells that line vessels are known to secrete a variety of relaxing and constrictingfactors, many of which have not yet been identified. An increase in the level ofadenosine is currently believed to be the chief vasodilatory chemicals. Low level ofoxygen in the blood also may cause vasodilation. Whatever their identity thevasodilatory substances are washed away as blood flow increases in response toincreased vessel diameter. A declining level of vasodilatory chemicals results invasoconstriction. Thus, vessel diameter is continuously adjusted according toconcentrations of vasodilatory chemicals, which are directly related to the tissuesmetabolic activity.

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