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Fremont, CA

Sample Case Study : Landscape Analysis for Neurosurgical space

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Problem Statement

- One of our clients, a leading Neurosurgery player, wanted to acquire an in-depth understanding of the Neurosurgery landscape in the U.S. to guide the strategy and direction of the company.

Orbees Approach

- Orbees first identified key neurological diseases that are currently treated or can be potentially treated surgically. Secondary research and various data bases were used to find out the incidence, prevalence, diagnosis rates and surgical procedures rates associated with these diseases.
- Secondary research was also done to identify future trends.
- Various surgical instruments and devices used in various neuro-surgeries were identified and mapped to various surgeries.
- Client and competitor instruments and devices were identified and mapped to various surgeries and diseases.
- Competitive share of the client and other players was also calculated and mapped to each surgery and disease condition.
- A final map was created with various client and competitor products and competitive shares for each of the diseases and surgeries.
- Inferences from the map and future trends identified were used to create a heat map.

Outcomes

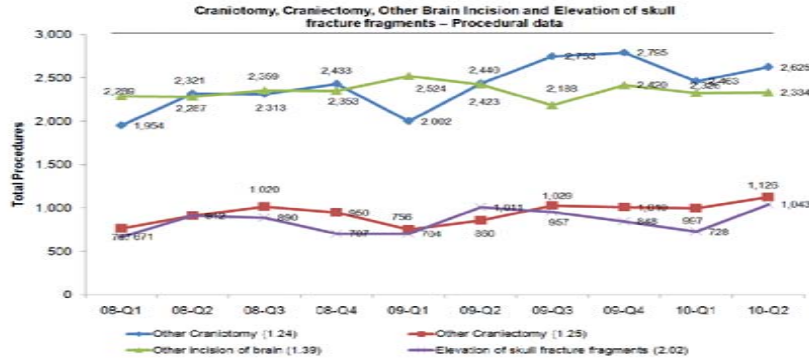
- The landscape analysis helped the client understand the various diseases pertinent to the neurosurgery space and their associated prevalence, incidence, diagnosis and procedure rates.
- The analysis also highlighted client's presence and absence in key areas, competitive share and key areas of competitor focus.
- The heat map helped the client identify potential areas of growth, gaps in its product offerings and threats from competition.

Orbees Deliverables

Patient volumes associated with different types procedures and diagnosis were captured

Trauma - Procedural Data

Other Craniotomy related Procedural Data

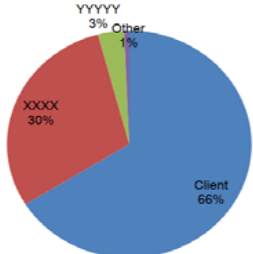


Competitive shares of various players for each device and instrument type were captured

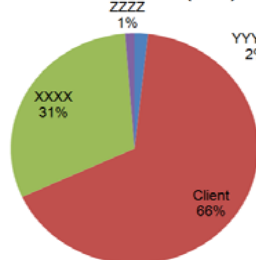
General technologies for diseases – Operative Assistance

Market share of various companies in Bipolar Forceps market

Share of companies in Bipolar forceps market in the U.S. (2009)



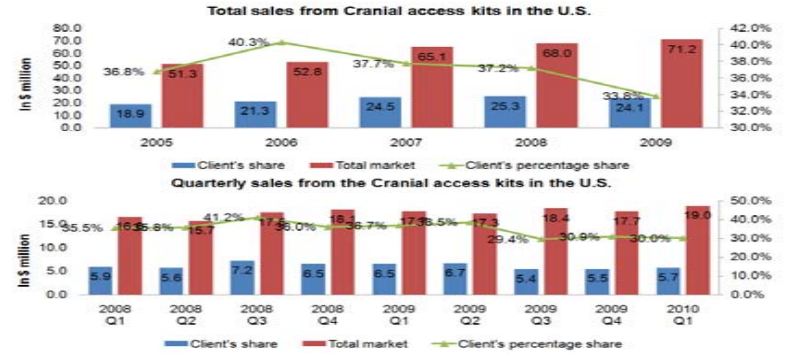
Share of companies in Bipolar forceps market in the U.S. (2008)



Sales volumes and \$ values of key devices and instruments associated with Neurosurgery procedures were captured

General technologies for diseases – Access

Yearly and Quarterly Sales – Cranial Access kits



Based on analysis of diagnostic and procedure volumes and sales and competitive shares a heat map was created

Product Category	Product Type	2009 Market value in thousand US\$	2009 Client sales value in million US\$	Core Disease Areas					
				Mechanical/Endovascular (Endovascular)	Other surgeries for A&E (including endovascular)	Aneurysm/AVM clipping	Other surgeries for Aneurysm/AVM/SM	Other craniotomies and craniectomies for endovascular disease	Other
				1,000	118,884	14,081	11,189	6,848	
Specific technologies for diseases				% of procedure using the technology	Market value from the procedure in thousand US\$	% of procedure using the technology	Market value from the procedure in thousand US\$	% of procedure using the technology	Market value from the procedure in thousand US\$
Aneurysm/AVM clips		14,457	0%	0%	-	100%	11,144	10%	911
Shunts		109,277	14%	0%	-	0%	-	0%	-
Mechanical Endovascular devices		51,271	-	100%	51,271	0%	-	0%	-
Deep Brain Stimulation		112,836	-	0%	-	0%	-	0%	-
General technologies for diseases				% of procedure using the technology	Market value from the procedure in thousand US\$	% of procedure using the technology	Market value from the procedure in thousand US\$	% of procedure using the technology	Market value from the procedure in thousand US\$
Access	Surgical Drills/Peelers	18,455	83%	0%	-	1%	397	100%	1,451
	Neuro Instrumentation	45,188	13%	0%	-	4%	9,862	100%	7,819
Operative assistance	Endoscopes	21,390	6%	0%	-	10%	3,709	40%	4,181
	Ultrasonic Aspirator	16,984	-	0%	-	0%	-	0%	-
Monitoring & Imaging	Endoscopes	2,718	-	0%	-	0%	-	0%	-
	Monitoring (CT, PET, MRI)	18,362	14%	0%	-	0%	-	0%	-
Monitoring & Imaging	Drainage	21,312	41%	0%	-	0%	-	0%	-
	Fluoroscopy	4,744	-	0%	-	0%	-	0%	-