



Clarivate | Medtech Marketrack

Prepared by Clarivate Medtech Team | 2025

MARKETRACK

MARKET SHARE REPORTING

BRAND PERFORMANCE TRACKING

MARKET OPPORTUNITY ASSESSMENT

COMPETITOR PRICING ANALYSIS

PROCEDURE TRENDS

PRODUCT PORTFOLIO PERFORMANCE
ANALYSIS

Marketrack Methodology

MarkeTrack methodology involves recruiting hospital personnel responsible for the management of medical equipment and procedures to participate by providing procedure volumes, device usage data, and brand-level pricing information on an ongoing basis.

Sample/ Survey design 	End users surveyed 	Data collected 	Analysis 	Data Reports 
• Characterize universe • Review literature • Identify key respondents • Sample stratification • Design survey • Program survey	• CathLab Managers • Nurses • Purchasing Managers • Interventional Cardiologists • Interventional Radiologists • Stoma Nurses • Radiation Oncologists	• Procedure volumes • Manufacturers/Brands • Prices paid • Installed base • New Purchases • Contrast agents • Patient gender • Reason for surgery • Type of stoma	• Survey data checks for consistency • Data verified with internal & external sources • Outliers isolated & verified with respondents • Extrapolated National Totals	• Customized reports • National/Regional data splits • Intuitive displays • Excel Reports • Tableau Reports

Marketrack is a solution that provides timely, global brand share tracking across the Medtech industry

Focus on detailed
product categories

Directional understanding of
device **manufacturer** and
brand share performance

Detailed capture of market
performance by all product
brands used in the market

Directional understanding
of **trends**

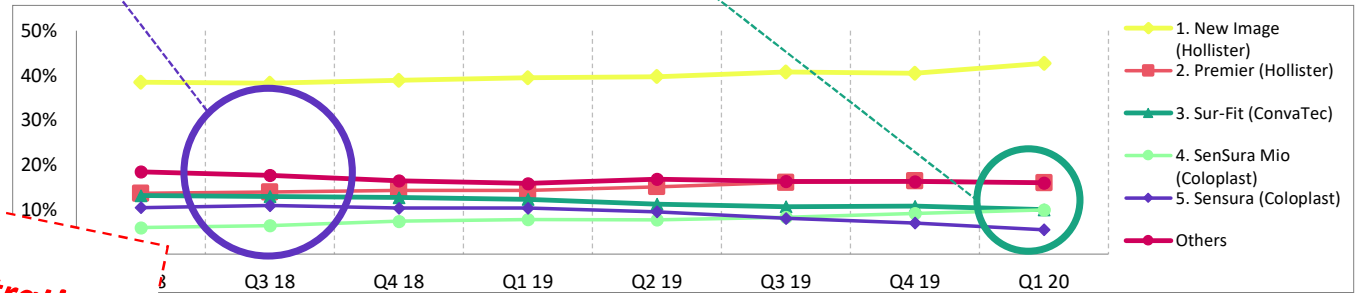
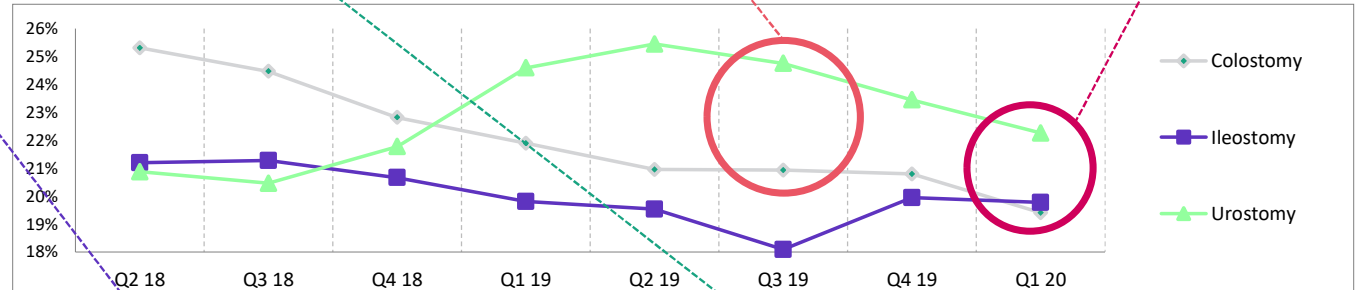
Dive into **competing**
treatments

Top 5 Manufacturer Brands Shares - Drainable (MAT)

Brand (Manufacturer)	Share of Patients		
	Q2 18	Q3 18	Q4 18
1. New Image (Hollister)	37%	37%	38%
2. Premier (Hollister)	13%	14%	14%
3. Sur-Fit (ConvaTec)	13%	13%	13%
4. SenSura Mio (Coloplast)	6%	6%	7%
5. Sensura (Coloplast)	11%	11%	11%
Others	19%	18%	16%
National Totals	107,581	107,528	107,227

Top 5 Manufacturer Brands Shares - Urostomy (MQT)

Brand (Manufacturer)	Share of Patients		
	Q2 18	Q3 18	Q4 18
1. New Image (Hollister)	48%	47%	45%
2. Premier (Hollister)	15%	16%	13%
3. Sur-Fit (ConvaTec)	15%	16%	15%
4. SenSura Mio (Coloplast)	9%	5%	
5. Active Life (ConvaTec)	4%	5%	
Others	9%	11%	
National Totals	2,130	2,143	



Illustrative

Data Capture and Sample Survey

				Manufacturer Usage Unit Share %						
A	Segment	Sub-Segment	# of Procedures	DePuy Synthes	Microport	Smith & Nephew	Stryker	Zimmer Biomet	Other (Please Specify)	Other (Please Specify)
	HIP IMPLANTS	Total Hip Arthroplasty								
		Partial Hip								
		Revision								
		Resurfacing								

What % of Total Hip Arthroplasty (THA) procedures are Anterior Approach?

What % of your total hip procedures are done through the anterior approach in the outpatient setting ?

Illustrative

				Manufacturer Usage Unit Share %						
B	Segment	Sub-Segment	# of Procedures	Arthrex	DePuy Synthes	Smith & Nephew	Stryker	Zimmer Biomet	Other (Please Specify)	Other (Please Specify)
	KNEE IMPLANTS	Total Knee Arthroplasty								
		Partial Knee Revision								
		Complete Knee Revision								
		Unicondylar								
		Patello-Femoral								

Data Capture and Sample Survey

1. Drug Eluting Stent (DES)										
合計 :										
For Office Use Only		# of DES in P1-Q3								G
製品名		数量		購入単価						

--- ABBOTT VASCULAR ---アボットバスキュラー

Xience Xpedition										
(径)	8	12	15	18	23	28	33	38	48	(mm長)
2.25										
2.5										
2.75										
3										
3.25										
3.5										
4										

Xience Sierra									
(径)	8	12	15	18	23	28	33	38	(mm長)
2.25									
2.5									
2.75									
3									
3.25									
3.5									
4									

2. Bare Metal Stents (BMS)										
合計 :									0	
For Office Use Only		# of BMS in P1-Q3								G
ID	製品名		数量		購入単価					

--- ABBOTT VASCULAR ---アボットバスキュラー

1875	Graftmaster								
1357	Multi-Link 8								

--- BOSTON SCIENTIFIC ---ボストンサイエンティフィック

22	Express2								
691	Liberte								

--- Biotronik---

2328	PK Papyrus								
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--- BIOSENSORS INTERNATIONAL ---日本バイオセンサーズ

704	S-Stent								
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--- GOODMAN --- グッドマン

101	Duraflex								
1701	Vival								

--- MEDTRONIC ---メドトロニック

1064	Driver Sprint								
1122	Integrity								

--- TERUMO ---テルモ

1461	Kaname								
49	Tsunami								

--- [Other] --- [その他]

社名/品名									
社名/品名									

Data Capture and Sample Survey

Decision-Making

1 What is the most important factor in selecting a supplier of patient simulators?

	RANK
Product Features	
Quality	
Sales Attention	
Customer Service	
Interoperability With A Specific Capture/Debrief System	
Price	

2 Who is the primary influencer of patient-simulator purchasing decisions?

Faculty
Simulation technicians/specialists
Training program director

3 When thinking about the bidding process, please select all that apply below

Getting bids from various vendors seen as a formality
Significantly impact product selection
Craft requirements specifically to favor a particular vendor
Requirements driven purely by training needs

Animatronics

1 Would you pay a significant premium for a simulator that could make facial expressions?

Yes, 10% more
Yes, 20% more
No

Markettrack Coverage

Therapy Areas

- Blood Analyzers
- Diagnostic Imaging
- Electrophysiology
- External Beam Radiation Therapy
- General Surgery
- Interventional Cardiology
- Interventional Oncology & Endovascular
- Orthopedics
- Pain Management & RF Ablation
- Spinal Cord Injury
- Stoma Care Patient Discharge
- Urinary Retention Management

Countries

- **North America:** United States, Canada
- **Latin America:** Argentina, Brazil, Colombia, Mexico
- **EU5:** United Kingdom, France, Spain, Italy, Germany
- **Rest of Europe:** Belgium, Czech Republic, Hungary, Sweden, Switzerland, Netherlands, Poland, Romania, Russia
- **EMEA:** Pakistan, Saudi Arabia, South Africa, Turkey
- **Asia-Pacific:** Australia, China, India, Japan, South Korea

Plus, supplemental or aggregate coverage of smaller markets across Europe, Asia-Pacific and Latin America

Market share reporting

Brand performance tracking

Market opportunity
assessment

Competitor pricing analysis

Regional pricing analysis

Product portfolio
performance analysis

Markettrack Engagement A - Global RF Ablation Market Overview

Clarivate and client partnered to help understand the current RF Ablation market in various countries that informs the development of the marketing plan and sales team strategy

Business Context

The client’s executive team needed an on the ground assessment of how RF Ablation procedures were being adopted across a variety of countries to help inform a business plan to deploy resources across those regions.

Key Engagement Objectives Questions
Top anatomies treated by RF Ablation
Understand the qualitative drivers that impact market growth, product usage, and brand selection
#1 treatment chosen by physicians before RF Ablation

Clarivate Solution
Primary market research-based and applicable secondary research methodology

Primary Research Inputs
20 Telephone Interviews
140 Quantitative Surveys
20 Face-to-Face Interviews

Additional Resources
Internal Clarivate Data Assets

Markettrack Engagement B - China Interventional Cardiology

Clarivate helps multiple clients track procedures and corresponding devices that are implanted in the Japanese Interventional Cardiology market on a monthly basis

Business Context

Clients needed a solution that gives visibility into the monthly trends of the Interventional Cardiology market in Japan that includes percutaneous coronary interventions, their corresponding devices like coronary stents, adoption of new products.

Key Engagement Objectives Questions
Percutaneous Coronary Intervention trends
Coronary Stents implants by manufacturer and brands
Imaging devices adoption into PCI procedures

Clarivate Solution

Primary market research-based and applicable secondary research methodology

Primary Research Inputs

110 Monthly Quantitative Surveys that captures monthly procedure volumes and devices implanted/used.

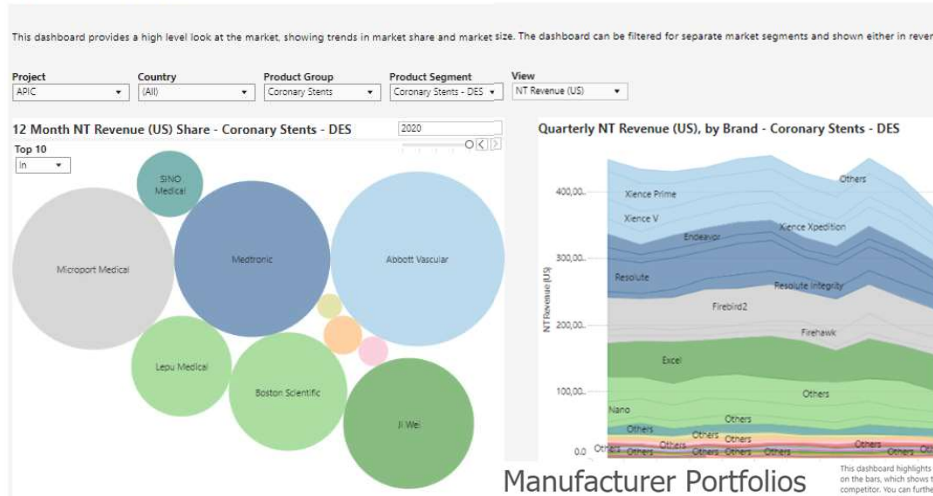
Sample is highly consistent month over month

Additional Resources

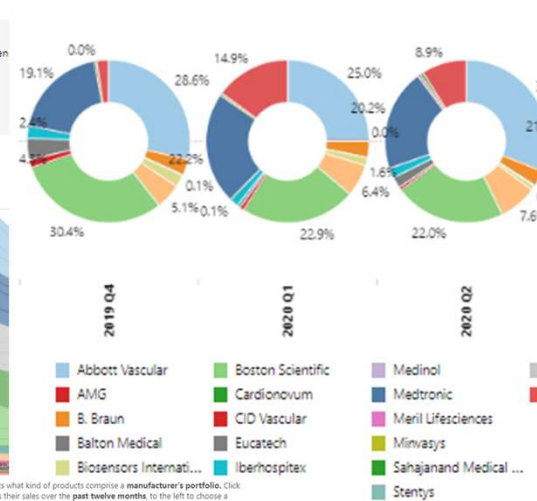
Internal Clarivate Data Assets

Data Views - Tableau

Asia Pacific - Interventional Cardiology Markettrack Market Overview



NT Revenue (US) Share - Coronary Stents - DES

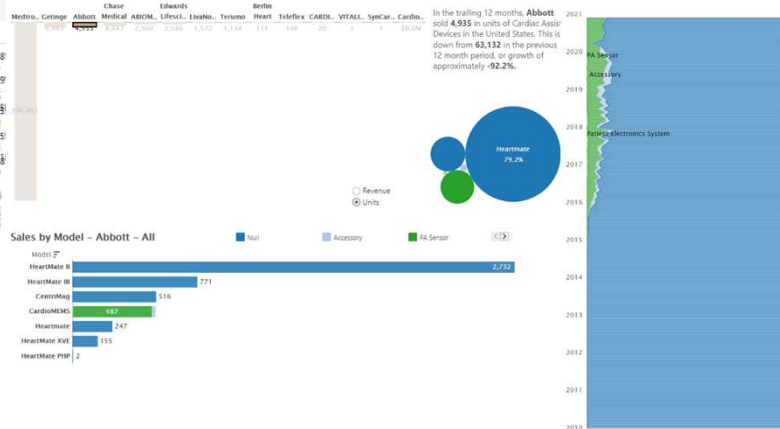
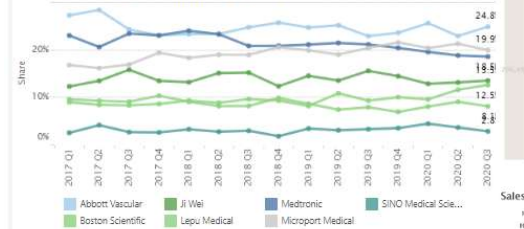


Pricing Tool

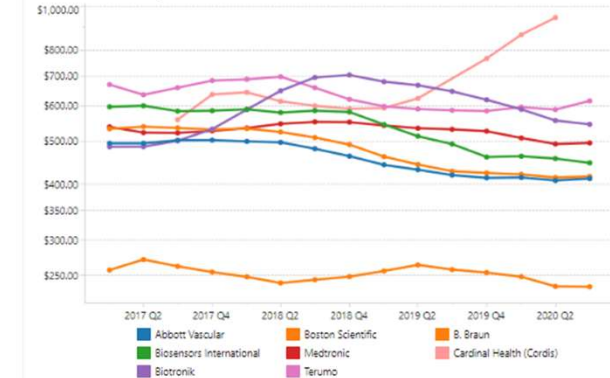


Illustrative

NT Revenue (US) Share - Coronary Stents - DES



ASP Trend - Coronary Stents - DES



Data Views - Excel

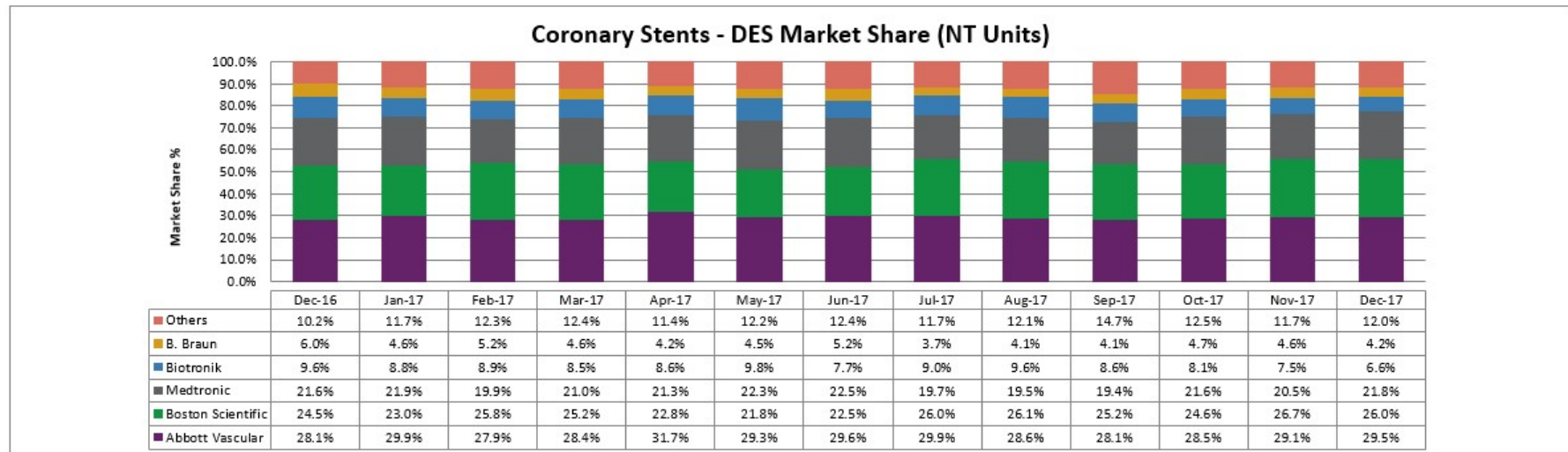
Choose Country **EU5**

NT Units	Dec-16	Nov-17	Dec-17	MoM Δ	MYoY Δ
Coronary Stents Units					
Coronary Stents - DES Units					
Coronary Stents - BMS Units					

NT Units	Dec-16	Nov-17	Dec-17	MoM Δ	MYoY Δ
DES Penetration					

Lab Count	Dec-16	Nov-17	Dec-17	MoM Δ	MYoY Δ
Total # of Labs surveyed					
DES Sample Penetration					
BMS Sample Penetration					

Illustrative



Data Views - Excel

Data	France	Germany	Italy	Spain	UK	EU5
# of Diagnostic Angiographies						
# of Drug Eluting Stent Procedures						
# of Bare Metal Stent Procedures						
# of Mixed Stent Procedures						
# of PTCA w/ Stent Procedures						
# of Direct Stent Procedures						
Total Stent Procedures						
# of PTCA Balloon Procedures						
# of Cutting Balloon Procedures						
# of Non-stented Other Interventional						
# of Diagnostic Only Procedures						
# of Same Session Procedures						
# of Intervention only Procedures						
Total Interventions						
# of Rotational & Directional Atherectomy Procedures						
# of Laser Catheter Procedures						
# of Thrombectomy Procedures						
# of Radiation Therapy Procedures						
# of IVUS Interventional Procedures						
# of IVUS Diagnostic Procedures						

Illustrative

Data Views - Excel

# of Facilities Reporting		
Group-SubGroup	PTCA Balloons - Normal	▼
Country	EU5	▼

Count of Lab_ID	Date												
Manufacturer	Dec-16	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17
Boston Scientific	200	189	198	201	192	195	196	202	191	190	210	195	188
Abbott Vascular	114	117	119	128	128	128	124	119	118	111	119	117	127
Terumo	89	85	85	85	90	92	90	83	92	91	96	99	82
Medtronic	82	81	76	84	83	83	81	77	86	87	91	89	83
Biotronik	44	40	42	45	41	45	44	44	44	46	46	49	48
B. Braun	17	12	17	20	16	17	17	20	18	14	20	18	18
Cardinal Health (Cordis)	12	10	9	8	13	12	12	13	11	9	9	13	13
SIS Medical	9	6	9	9	8	9	10	10	10	6	9	12	12
OrbusNeich	8	5	5	4	5	5	8	8	9	10	11	11	11
Hexacath	9	6	6	6	9	10	9	10	7	6	9	11	11
Invatec	6	6	7	5	7	3	5	7	4	6	4	4	4
Biosensors International	6	3	5	4	6	5	8	6	6	4	7	4	4
Acrostak	7	2	7	3	4	5	3	5	3	6	4	4	4
Meril Lifesciences	5	6	4	3	4	4	6	4	3	3	4	5	5
Minvasys	4	1	6	4	4	2	3	3	3	4	3	3	2
Iberhospitex	3	2	3	3	3	3	3	3	3	4	3	3	3
Intelligent Kinetics	1	4	1	1	3	3	1	2	3	3	2	3	3
Blue Medical	1	2	3	2	2	2	2	2	1	2	1	2	2
CID Vascular	2	2	1	1	1	2	2	2	1	1	4	1	1
iVascular	1	1	2	2	1	2	2	1	2	2	1	2	2
Balton Medical	2	1	3			2		2	2	1	2	2	2
Bolton Medical	1	1	1			1	2	2	1	2			1
Kaneka								2	2	2	2	1	2
ClearStream Technologies		1	1					1	1	1			
Bard		1					1	1			1		
Rontis Medical										1			
Grand Total	623	584	610	618	620	630	629	629	621	612	658	649	625

Illustrative

Data Views - Excel

YYYY	Quarter	Product_ID	Statistics_ID	Lab_ID	Lab Size	Facility Type	Date	Country	Group	Manufacturer
2009	1	8	9318	EC226	L	public	39814	France	PTCA Balloons	Boston Scientific
2009	1	9	9318	EC226	L	public	39814	France	PTCA Balloons	Boston Scientific
2009	1	10	9318	EC226	L	public	39814	France	PTCA Balloons	Boston Scientific
2009	1	289	9320	EC001	L	private	39814	France	PTCA Balloons	Abbott Vascular
2009	1	8	9320	EC001	L	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	502	9320	EC001	L	private	39814	France	PTCA Balloons	Terumo
2009	1	787	9338	EC335	L	public	39814	France	PTCA Balloons	Abbott Vascular
2009	1	8	9338	EC335	L	public	39814	France	PTCA Balloons	Boston Scientific
2009	1	8	9376	EC186	L	public	39814	France	PTCA Balloons	Boston Scientific
2009	1	350	9376	EC186	L	public	39814	France	PTCA Balloons	Medtronic
2009	1	289	9398	EC003	L	private	39814	France	PTCA Balloons	Abbott Vascular
2009	1	8	9398	EC003	L	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	859	9398	EC003	L	private	39814	France	PTCA Balloons	Cordis
2009	1	863	9398	EC003	L	private	39814	France	PTCA Balloons	Cordis
2009	1	903	9398	EC003	L	private	39814	France	PTCA Balloons	Medtronic
2009	1	782	9392	EC009	M	private	39814	France	PTCA Balloons	Abbott Vascular
2009	1	787	9392	EC009	M	private	39814	France	PTCA Balloons	Abbott Vascular
2009	1	8	9392	EC009	M	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	10	9392	EC009	M	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	248	9392	EC009	M	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	350	9392	EC009	M	private	39814	France	PTCA Balloons	Medtronic
2009	1	903	9392	EC009	M	private	39814	France	PTCA Balloons	Medtronic
2009	1	502	9392	EC009	M	private	39814	France	PTCA Balloons	Terumo
2009	1	289	9393	EC045	M	private	39814	France	PTCA Balloons	Abbott Vascular
2009	1	787	9393	EC045	M	private	39814	France	PTCA Balloons	Abbott Vascular
2009	1	8	9393	EC045	M	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	10	9393	EC045	M	private	39814	France	PTCA Balloons	Boston Scientific
2009	1	863	9393	EC045	M	private	39814	France	PTCA Balloons	Cordis

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