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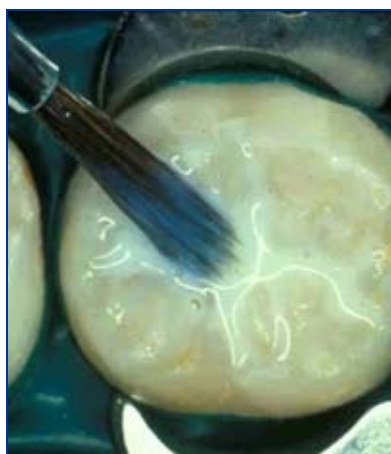
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Medical & Dental Adhesives & Sealants

US Industry Study with Forecasts for **2011 & 2016**

Study #2201 | May 2007 | \$4400 | 216 pages

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Many markets for medical adhesives and sealants -- including cyanoacrylate, polyethylene glycol and various plasma and protein types -- are experiencing fast growth off a small base.

US demand to grow 7.6% annually through 2011

Demand for medical and dental adhesives and sealants in the US is forecast to rise 7.6 percent per year to \$1.8 billion in 2011. Much of this growth can be attributed to the aging US population, as older individuals are more likely to require surgical and dental procedures. Advances will also depend on continuing new product development and increasing acceptance of these materials in surgical and consumer settings.

Cyanoacrylate, polyethylene glycol among best prospects

With the exception of joint replacements and most dental applications, medical applications for adhesives and sealants are relatively new, and thus many markets are experiencing fast growth off a small base. Cyanoacrylate adhesives are projected to find greater use in external tissue bonding applications, particularly in medical emergency and consumer settings. In addition, rapid gains should result from the commercialization of several products presently in development, including cyanoacrylates for internal applications. Continued market penetration of polyethylene glycol sealants in tissue bonding and sealing applications during cardiovascular surgical procedures, as well as the development of an expanded application base into abdominal and cranial procedures, will provide rapid growth for these



materials. Rapid gains for plasma and protein sealants, including those based on albumin and collagen, will be promoted by their expanded use in surgical procedures such as tissue sealing.

Medical applications to outpace dental uses

Due to the aforementioned factors, medical applications will achieve more rapid growth than dental applications through 2011. In internal medical applications, adhesives and sealants will experience the best growth in situations where the tissue involved is affected by pressure caused by blood (e.g., capillaries, veins or arteries), air (e.g., the lungs), solids (e.g., the gastrointestinal

system) or fluids (e.g., the dural membrane in the cranial region, the bladder or the spinal cord). In external medical applications, adhesives and sealants will find increased opportunities in external tissue bonding, particularly on low tension wounds.

Dental applications will post annual growth of 4.1 percent through 2011. However, good opportunities still exist, especially in newer products. For example, pit and fissure sealants will register strong gains due to their use in the prevention of cavities. Products such as denture adhesives, restorative adhesives and luting cements will see limited gains through 2011, primarily due to overall improved dental health.

Sample Text, Table & Chart

APPLICATIONS

Dental Applications

Consumption of adhesives and sealants in dental applications is forecast to rise 4.1 percent per year through 2011. Growth will be limited by a lower incidence of tooth loss and the effort from the fluoridation of water. The benefits of brushing and flossing, strict gains for restorative and luting cements, growth will be favored for pit and fissure sealants. In dental applications, adhesives and sealants generally do not compete with other technologies. This is in contrast to other applications where adhesives and sealants compete with bandages, sutures or staples. In 2011, dental applications are expected to account for 39 percent of the total medical and dental adhesives and sealants market.

There are seven major categories of dental adhesives and sealants: denture bonding agents, pit and fissure sealants, restorative adhesives, cements, orthodontic bonding agents, luting cements, tray adhesives and surgical tissue bonding. Adhesives and sealants are projected to achieve the most rapid gains in tissue bonding as more dental professionals realize the benefits of using these materials in various surgical procedures, such as tooth extractions. Pit and fissure sealants will also register above-average gains due to their use in the prevention of cavities. Products such as denture adhesives, restorative adhesives and luting cements will see limited gains through 2011, primarily due to overall improved dental health in the US population.

Several technologies can be used in the production of dental adhesives and sealants, including bisphenol-A-glycidyl methacrylate (BIS-GMA), glass ionomer, hybrid glass ionomers, methacrylate, polycarboxylate, silicone, sodium carboxymethyl cellulose, urethane acrylate, zinc phosphate, zinc oxide-eugenol and a copolymer of methyl vinyl ether

SAMPLE
TEXT

TABLE III-8

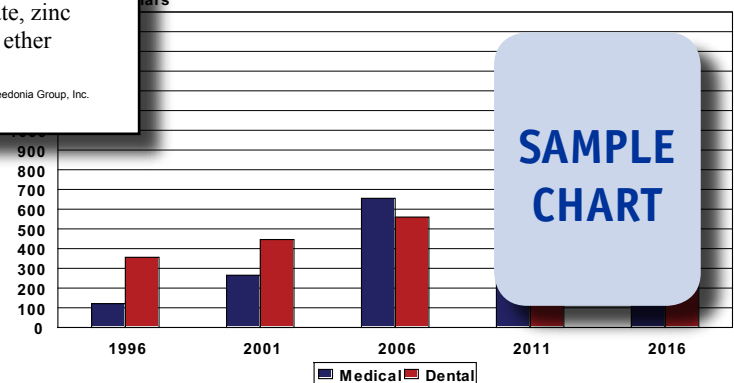
NATURAL-BASED MEDICAL & DENTAL ADHESIVES & SEALANTS DEMAND BY PRODUCT & APPLICATION (million dollars)

Item	1996	2001	2006	2011	2016
Resident Population (mil persons)	269	285	299	313	326
\$ natural/capita	0.5	1.0	2.0	3.0	3.9
Natural-Based Adhesives/Sealants	118	200	305	410	565
By Product:					
Plasma & Protein					5
Other Natural					0
By Application:					
Internal Medical					6
Dental					4
External Medical					5
\$/ml					3
Natural Adhesives/Sealants (mil ml)					0

SAMPLE
TABLE

CHART IV-1

NATURAL-BASED MEDICAL & DENTAL ADHESIVES & SEALANTS DEMAND BY APPLICATION, 1996-2016

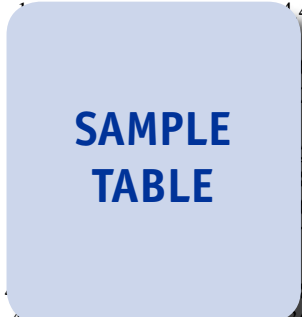


SAMPLE
CHART

Sample Profile, Table & Chart

TABLE V-3
DENTAL OFFICES MARKET FOR MEDICAL & DENTAL ADHESIVES & SEALANTS (million dollars)

Item	1996	2001	2006	2011	2016
Dental Offices (000)	113	117	121	123	126
000\$ adhesives/office					14
Dental Visits (million)					0
\$ adhesives/visit					2
Dental Adhesives & Sealants					5
Pit & Fissure Sealants					8
Restorative Adhesives					0
Other					7
% dental office					8
Medical/Dental Adhesives & Sealants	47	111	125	155	235



COMPANY PROFILES

Prestige Brands Holdings Incorporated
 90 North Broadway
 Irvington, NY 10533
 914-524-6810
 http://www.prestigebrands.com

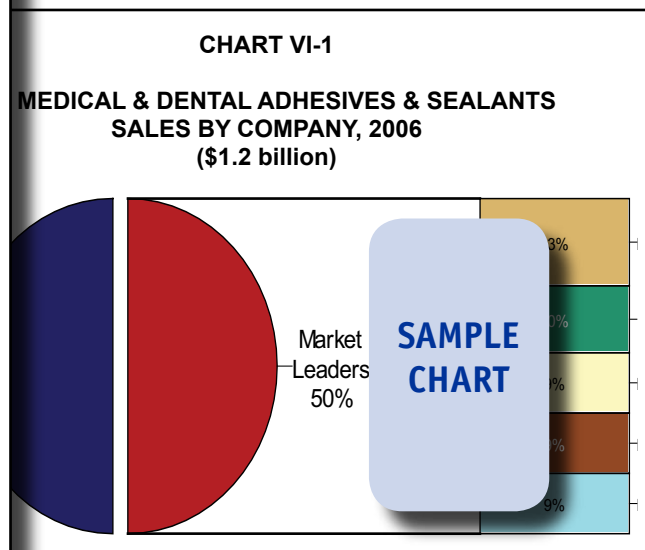
Revenue
 Employment
 Key Products

SAMPLE PROFILE

Prestige Brands Holdings Incorporated is a private equity firm GTCR Golden Ridge Capital in the marketing, sale and distribution of over-the-counter pharmaceuticals, household cleaning and personal care products sold by mass merchandisers. The Company operates through three segments: Over-the-Counter Drug, Household Cleaning and Personal Care.

The Company participates in the medical adhesive and sealant industry through the Over-the-Counter Drug segment, which generated FY 2006 sales of \$161 million. Among the segment's products are NEW-SKIN liquid bandages, which are brushed on skin and dry rapidly to form a clear protective cover that also kills germs via an antiseptic. The Company identifies the major competitor of their NEW-SKIN products as Johnson & Johnson (New Brunswick, New Jersey), maker of BANDAID liquid bandage. The segment uses various third-party manufacturers to fulfill all of its manufacturing needs. These manufacturers also handle production planning, research and development, procurement and quality testing. Principal customers of the Company's products include Wal-Mart (Bentonville, Arizona), Walgreens (Deerfield, Illinois), CVS (Woonsocket, Rhode Island), Target (Minneapolis, Minnesota) and Dollar General (Goodlettsville, Tennessee).

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OTHER STUDIES

Dental Equipment

US demand for dental equipment will grow 3.8% annually through 2011, aided by favorable population trends and strong interest in technology updates. In general, advanced equipment such as lasers, intra-oral cameras, digital radiography and CAD/CAM systems will lead gains. Dental offices will remain the largest market and grow the fastest. This study analyzes the \$2.4 billion US dental equipment industry to 2011 and 2016 by product and market. It also evaluates market share and profiles major players.

#2179 04/2007..... \$4400

Nanotechnology in Health Care

US demand for nanotechnology medical products will grow 17.5% annually through 2011, driven by the critical need for new or improved therapies and diagnostics. The greatest short-term impact will be in cancer and central nervous system disorders, followed by orthopedic nanoimplants. This study analyzes the \$23.6 billion US nanotech medical product industry to 2011, 2016 and 2021 by material, product and application. The study also reviews product development activities and profiles major players.

#2168 02/2007..... \$4500

Biocompatible Materials

US demand for biocompatible materials will grow 6.6% yearly through 2010. Synthetic polymers will remain dominant based on quality, performance and cost advantages in most applications. Ceramics will grow the fastest, driven by improved properties and processing ease. Hyaluronic acid and collagen will pace the natural polymer segment. This study analyzes the \$2.7 billion US biocompatible industry to 2010 and 2015 by material and application. It also evaluates market share and profiles major players.

#2111 09/2006..... \$4400

Cosmetic Surgery Products

US demand for cosmetic surgery products will grow 9.1% annually through 2010, driven by an obsession with youth coupled with an aging population and greater product availability. Nonsurgical markets (e.g., injections, dermal resurfacing, micro-dermabrasion) will lead gains based on consumer preferences for less invasive treatments. This study analyzes the \$1.6 billion US cosmetic surgery product industry to 2010 and 2015 by material, product and procedure. It also evaluates market share and profiles major players.

#2099 09/2006..... \$4300

Dental Products & Materials

US demand for dental supplies will grow 5.5% yearly through 2010 based on favorable demographics and a strong interest in cosmetic dentistry. The best gains will be found in ceramic fillings, clear or tooth-colored orthodontics, veneers and whitening gels, implants, new toothpastes and mouthwashes, and over-the-counter whitening products. This study analyzes the \$17.2 billion US dental supply industry to 2010 and 2015 by product and raw material. It also profiles major competitors and details market share.

#2044 04/2006..... \$4200

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