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Infection Prevention Products & Services

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

Study #2234 | August 2007 | \$4400 | 242 pages

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Surgical drapes and gowns will continue to post the largest share of US infection prevention supply revenues through 2011, with growth driven by enhanced barrier, level 4 textiles.

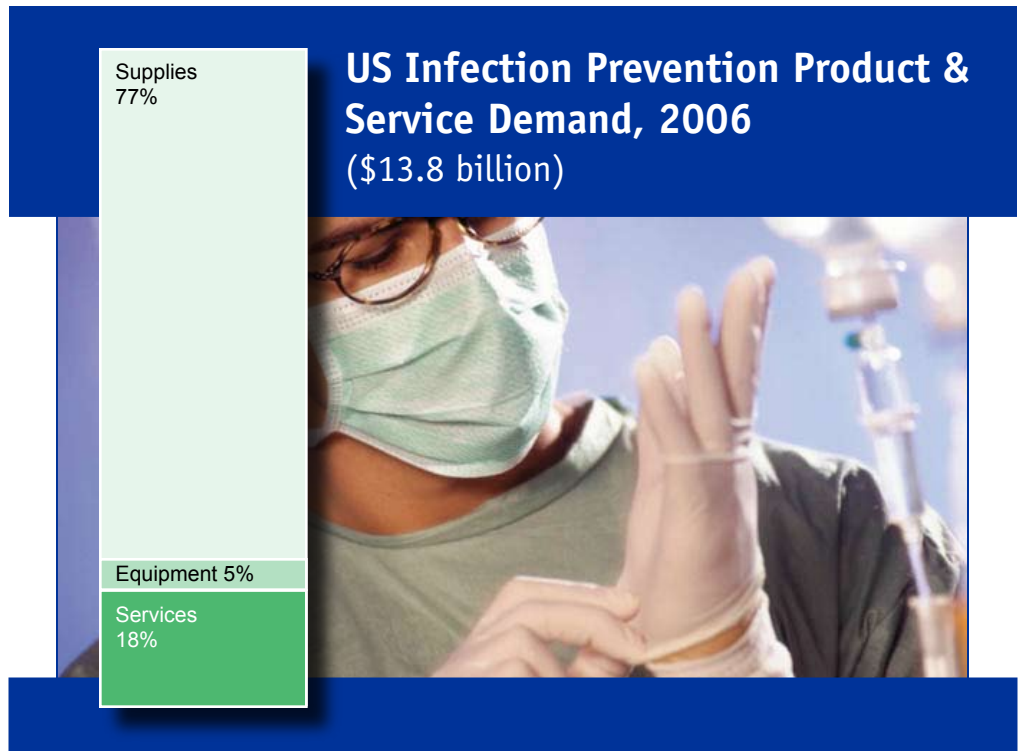
US demand to grow 4% annually through 2011

US demand for infection prevention products and services will advance 4.0 percent annually to \$16.8 billion in 2011. Growth will reflect increasing government and private pressures on the medical community to alleviate the widespread problem of healthcare-acquired infections (HAIs). The need for improved infection prevention strategies also exists in the life science sector.

Surgical products, disinfectants to stay dominant

Among all infection prevention supplies, products used in surgery will continue to post the largest share of revenues. The elevated risk of transmitting air- and blood-borne pathogens in the operating room, coupled with upward trends in the number of operative procedures, will increase demand for surgical drapes and gowns 3.6 percent annually to \$3.9 billion in 2011. Expanding preferences for enhanced barrier, level 4 textiles (which provide the strongest protection against pathogens) will impact favorably on growth. Cost containment pressures and advances in less invasive surgical techniques will moderate a faster rise in demand.

Disinfectants consumed by health care and life science facilities will comprise a \$2.8 billion market in 2011, up 3.8 percent annually from 2006. Pressures on health care facilities to adopt stricter



staff hygiene and facility cleaning and disinfection practices will bolster gains. Additionally, growth in surgical procedures will boost the market for scrubs, patient preparations and instrument disinfectants. Disinfectant use in life science facilities will also expand as production systems and research and diagnostic investigations become increasingly complex and more vulnerable to microbial contamination.

Sterilization, medical waste disposal supplies among fastest growing

Health care and life science markets for sterilization supplies, equipment and

services will post moderate growth as medical providers and producers adopt stricter protocols to ensure the safety of new and reprocessed products. Stepped up efforts to prevent the transmission of pathogenic microorganisms to and from staff personnel will boost demand for medical and laboratory gloves, face masks and other protective apparel, especially in the health care sector. Lastly, the widespread upgrading of medical and life science infection prevention standards, coupled with continued EPA restrictions on onsite incineration, will create above average growth opportunities for medical waste disposal supplies, equipment and services.

Sample Text, Table & Chart

MARKETS

Life Science Market

The life science sector consists of more than 16,400 manufacturing research and production facilities that provide a wide range of supplies for a wide range of supplies for genetic microorganisms and other personnel, compromising in. Because of the strict quality imposed on pharmaceuticals and services account for approximately revenues realized from life science market.

**SAMPLE
 TEXT**

Demand by Type

Demand for infection prevention products and services in the life science market will increase 5.2 percent annually to \$2.7 billion in 2011. Growth opportunities will continue to be divided between the medical research and drug discovery segment and the pharmaceutical and medical device production segment. The increasing sophistication of life science research and drug discovery activities is broadening the infection prevention needs of laboratory workers. During manufacturing, pharmaceuticals and sterile medical devices are highly vulnerable to contamination by pathogenic microorganisms. As a result, the life science sector provides substantial sales opportunities for a complete range of sterilization supplies and equipment as well as surface disinfectant and various types of protective apparel.

The best growth opportunities for infection prevention in the life science research market will exist in high-level disinfectants, hand sanitizers, synthetic gloves, face masks, medical waste and contract sterilization services. Based on the extent of growth requirements, pharmaceutical companies will continue to hold the largest share of demand followed by medical research facilities, medical supply and device manufacturers. Forensic laboratories

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TABLE IV-2

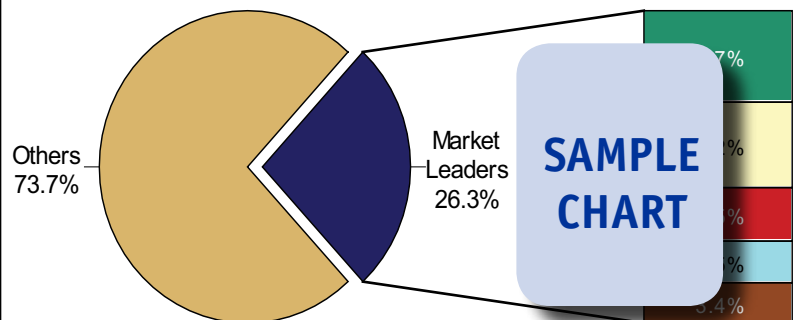
HEALTH CARE MARKETS - INFECTION PREVENTION
 PRODUCT & SERVICE DEMAND BY FACILITY
 (million dollars)

Item	1996	2001	2006	2011	2016
Health Care Facilities (000)					
000\$ infection prevention/facility					
Health Care Markets					
Hospitals					
Outpatient Facilities					
Physicians' Offices					
Dental Offices					
Nursing Homes					
Other Health Care Markets					
% health care					
Infection Prevention Markets					

**SAMPLE
 TABLE**

CHART V-1

INFECTION PREVENTION SUPPLIES & EQUIPMENT,
 MARKET SHARE BY COMPANY, 2006
 (\$11.3 billion)

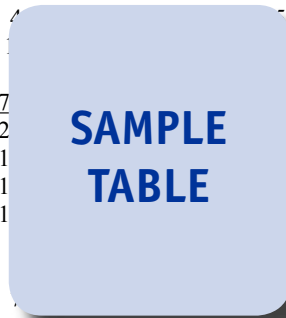


**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE III-2
INFECTION PREVENTION SUPPLIES DEMAND
 (million dollars)

Item	1996	2001	2006	2011	2016
Health Care & Life Sci Facilities (000)	4	4	4	4	4
000\$ inf prevention supplies/facility	79.5	78.0	76.7	75.4	74.0
Infection Prevention Supplies	7	7	7	7	7
Surgical Drapes & Gowns	2	2	2	2	2
Disinfectants	1	1	1	1	1
Sterilization Supplies	1	1	1	1	1
Medical & Laboratory Gloves	1	1	1	1	1
Face Masks					
Infectious Waste Disposal Supplies					
Other Supplies					
% supplies	79.5	78.0	76.7	75.4	74.0
Inf Prevention Products & Services	8890	11250	13840	16800	20200



COMPANY PROFILES

GOJO Industries Incorporated
 One GOJO Plaza, Suite 500
 Akron, OH 44311
 330-255-6000
<http://www.gojo.com>



Annual Sales:
 Employment:

Key Products:
 non-antimicro

bacterial and
 products

GOJO Industries, a privately held concern, is a leading worldwide producer and supplier of hand hygiene and related skin care products for commercial, industrial and institutional use. The Company's product offerings encompass instant hand sanitizers, hand soaps, lotions and other hand care products. In addition, GOJO supplies dispensing systems and related accessories for use with its hand care products. The Company has facilities in the US, the United Kingdom, Belgium, France, Japan, China, Mexico, Brazil and Peru.

GOJO Industries participates in the US infection prevention industry through the production of such health care products as instant hand sanitizers, antimicrobial/antibacterial and non-antimicrobial hand soap, and surgical scrubs. The Company's alcohol-based instant hand sanitizers are marketed under the PURELL brand name and are formulated to kill 99.99 percent of microorganisms in as short a time as 15 seconds without requiring the use of water or towels. For the health care sector, the Company's PURELL instant hand sanitizer line includes standard sanitizing gels; sanitizing gels with aloe or moisturizing ingredients; foaming hand sanitizer products; and wipes. One notable formulation known as the PURELL Instant Hand Sanitizer Lasting Care Formula is compatible with latex gloves worn by health care professionals.

"Spurred by steady growth in the number of surgical cases and increasing preferences for higher value-added formulations, total surgical disinfectant demand is projected to expand 3.5 percent annually to \$735 million in 2011. The multiple supplier availability of widely used preparations, magnified by trends toward smaller operating room staffs and less invasive surgical procedures, will moderate faster gains."

--Section III, pg. 72

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OTHER STUDIES

World Wipes

Global demand for wipes will rise 6.5% yearly through 2011. Developed markets in the US, Western Europe and Japan will remain dominant, while more rapid gains will occur in developing nations such as China and India. Baby wipes will stay the largest type while household, personal care and health care wipes grow the fastest. This study analyzes the \$5.8 billion world wipes industry, with forecasts for 2011 and 2016 by product, world region and for 14 countries. It also details market share and profiles major producers.

#2231 08/2007..... \$5400

Disposable Medical Supplies

US demand for disposable medical supplies will grow 4.9% annually through 2011. Best prospects include dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; tissue sealants for wound closure; and daily contact lenses. This study analyzes the US disposable medical supply industry, with forecasts for 2011 and 2016 presented by product, market and raw material. It also evaluates company market share and profiles industry competitors.

#2196 05/2007..... \$4500

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 for 2011 and 2016 by product and market. It also evaluates market share and profiles major players.

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

In Vitro Diagnostics

US demand for in vitro diagnostic (IVD) products will grow 5.1% annually through 2011. Clinical chemistry and immunoassay methods will remain the top two IVD sciences, while nucleic acid testing products will continue to generate the fastest gains. Hospital labs will stay the largest market while home health care will grow the fastest. This study analyzes the \$15.2 billion US IVD industry for 2011 and 2016 by product, application and market. It also evaluates company market share and profiles major players.

#2175 04/2007..... \$4500

Wipes

US wipes demand will grow 6.1% annually through 2011, propelled by new products and further market segmentation. Baby wipes will remain the top selling type while disinfectant and medicated wipes will grow faster. Spunlaced nonwovens will lead gains by substrate, while surfactants pace demand among the chemicals which saturate wipes. This study analyzes the \$1.6 billion US wipes industry for 2011 and 2016 by market, substrate and chemical. It also evaluates company market share and profiles major producers.

#2155 02/2007..... \$4300

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