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Medical Plastics

US Industry Study with Forecasts for **2012 & 2017**

Study #2467 | February 2009 | \$4700 | 338 pages

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ENGINEERING

MEDICAL PLASTICS

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Increased attention to infection control will spur greater use of disposable medical products and sterile packaging, as well as the use of materials able to withstand intensive sterilization.

US demand to reach \$6.6 billion in 2012

Demand for medical plastics in the US is forecast to expand 2.6 percent annually to five billion pounds in 2012, valued at \$6.55 billion. Advances reflect the shift to an older demographic, resulting in a rising incidence of acute and chronic conditions and an increasing volume of patient activity. This will broaden overall demand for medical devices, supplies and packaging. Increased attention to infection control will also portend the greater use of disposable medical products and sterile packaging materials, as well as the use of materials capable of withstanding intensive sterilization. Plastic demand will also benefit from advantages over metal, glass and rubber, such as lower costs, lighter weight, clarity, chemical resistance and the ability to be cost-effectively molded into ergonomic shapes.

Commodity plastics to remain largest segment

Demand for commodity plastics used in the production and packaging of medical products is expected to rise 2.3 percent yearly to 4.3 billion pounds in 2012, valued at \$4.6 billion. Leading commodity resins include polyvinyl chloride (PVC), polypropylene, polyethylene and polystyrene. PVC growth will be stimulated by the resin's versatility, low cost, good performance properties and the introduction of environmentally safer

Packaging
56%

Supplies &
Equipment
44%

US Medical Plastic Demand by Market, 2012 (4.4 billion pounds)



photo: P/MC

grades. Thermoplastic polyester and polypropylene will exhibit the most rapid growth due to opportunities in pharmaceutical and other medical product packaging. Slowest growth is anticipated for polystyrene based on saturated applications and competition from lower cost polypropylene.

Engineering plastics to be fastest growing segment

Engineering plastics accounted for eleven percent of the total volume of medical plastics in 2007, but a much higher 27 percent of total value. This results from the significantly higher price of engineering plastics compared to commodity plastics. Demand for engi-

neering plastics is expected to expand 5.2 percent annually to 630 million pounds in 2012, reaching nearly \$2 billion. Advances will be based on needs for higher performing materials in surgical instruments, diagnostic testing, drug delivery, geriatric care and preventative medicine. Best opportunities are anticipated in surgical and medical instruments, while faster growth is expected in surgical appliances and supplies. Polycarbonate will remain the leading engineering resin and exhibit the best growth prospects based on expanded needs for high clarity, impact resistance and other enhanced performance properties.

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Sample Text, Table & Chart

COMMODITY MEDICAL PLASTICS

Polypropylene

Demand for polypropylene, the second fastest growing plastic used in medical applications, is expected to rise globally to 3 billion lbs by 2017. Polypropylene will remain a translucent chemical. Polypropylene more expensive than other plastics such as polyethylene due to its resistance at high temperatures, and processing difficulties in many instances.

SAMPLE TEXT

Three different types of polypropylene serve as major production of medical supplies and equipment, and polypropylene accounts for the largest usage and incorporation of specific structure in which the propylene monomers are arranged in a normal top to bottom sequence. Syndiotactic polypropylene is manufactured through the addition of a single metallocene catalyst with the monomers positioned in an alternating pattern. Syndiotactic formulations provide better clarity and impact strength than isotactic at the expense of some dimensional stability. The third type of polypropylene is produced through random monomer insertion and is known as atactic.

Isotactic formulations dominate medical supply applications of polypropylene and are available in three forms: homopolymer, copolymer and random copolymer. Homopolymers encompass different grades, most of which are blended with fillers or other additives to enhance intrinsic characteristics. Impact copolymers with rubber additives to improve impact resistance. Random copolymers produced from ethylene and propylene comonomers, a combination of which enhances clarity and barrier properties.

70

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TABLE V-4

POLYCARBONATE DEMAND IN MEDICAL SUPPLIES & EQUIPMENT

Item	1997	2002	2007	2012	2017
Medical Supplies & Equip (bil 2000\$)	90	100	110	120	130
lbs polycarbonate/mil \$ supplies					
Supply & Eq Polycarbonate (mil lbs)					
Surgical & Medical Instruments					
Surgical Appliances & Supplies					
Research & Diagnostic Products					
X-Ray/Electromedical Equip/Other					
\$/lb	2	2	2	2	2
Supply & Eq Polycarbonate (mil \$)					
% supplies & equipment	8	8	8	8	8
Medical PC Demand (mil lbs)	10	10	10	10	10

SAMPLE TABLE

TABLE IV-6

POLYPROPYLENE DEMAND IN MEDICAL MARKETS

Item	1997	2002	2007	2012	2017
Medical Product Shipment (bil 2000\$)	200	200	215	225	271
lbs PP/000\$ medical products					
Medical Polypropylene (mil lbs)					
Medical Packaging					
Medical Supplies & Equipment					
\$/lb	9	9	9	9	9
Medical Polypropylene (mil \$)					
% polypropylene	7	7	7	7	7
Commodity Medical Plastics (mil lbs)	10	10	10	10	10
% medical	8	8	8	8	8
Polypropylene Demand (mil lbs)	10	10	10	10	10

SAMPLE TABLE

Sample Profile, Table & Forecast

COMPANY PROFILES

Solutia Incorporated

575 Maryville Centre Drive
 St. Louis, MO 63166
 314-674-1000
 http://www.solutia.com

Sales: \$1.9 billion
 North America
 Employees: 10,000

Key Products: Performance Products, Integrated Nylon, Solutia Chemicals

Solutia is a manufacturer of high-performance chemical-based materials for use in consumer, household, automotive and industrial products. The Company operates in two segments: Performance Products and Integrated Nylon. Solutia emerged from Chapter 11 bankruptcy protection in February 2008.

The Company is active in the US medical plastics industry via the Integrated Nylon segment, which reported 2007 sales of \$1.9 billion. Through this segment, Solutia manufactures and sells a range of nylon resins, intermediates and fibers, including VYDYNE nylon molding resins and acrylonitrile.

Solutia's VYDYNE product line comprises nylon 66 and nylon 66/6 engineering thermoplastic and extrusion-grade resin types, both of which are engineered to provide abrasion, chemical and flame resistance; high strength; enhanced insulating properties; and toughness. Additionally, VYDYNE resins feature such enhanced processing characteristics as easy filling, fast cycling and mold release properties. The Company makes VYDYNE products in nonreinforced varieties, as

**SAMPLE
PROFILE**

TABLE VI-3

PHARMACEUTICAL PACKAGING MARKET FOR PLASTIC BY RESIN (million pounds)

Item	1997	2002	2007	2012	2017
Pharm & Biological Shpts (bil 2000\$)	100	100	100	105	108
lbs plastic/000\$ pharm & bio	100	100	100	105	108
Plastics in Pharmaceutical Packaging	100	100	100	105	108
Commodity Plastics:					
High Density Polyethylene	10	10	10	10	10
Polyester	10	10	10	10	10
Polypropylene	10	10	10	10	10
Low Density Polyethylene	10	10	10	10	10
Polyvinyl Chloride	10	10	10	10	10
Other	10	10	10	10	10
Engineering Plastics:					
Thermoplastic Elastomers	10	10	10	10	10
Polycarbonate	10	10	10	10	10
Other	10	10	10	10	10
% pharmaceutical	10	10	10	10	10
Plastics in Medical Packaging	10	10	10	10	10

**SAMPLE
TABLE**

"Demand for engineering plastics in pharmaceuticals will remain limited to products requiring such properties as high clarity and enhanced barrier strength. Based on increasing applications in blister packaging and parenteral containers, cyclic olefin copolymers (COCs), glycol-modified polyethylene terephthalate copolyester and polycarbonate will provide the best growth prospects among higher barrier plastics."

--Section VI, pg. 172

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OTHER STUDIES

Natural Polymers

US demand for natural polymers will grow 7.1% annually through 2012. Best opportunities are anticipated in packaging uses based on the increased availability and cost competitiveness of novel polymers such as polylactic acid (PLA). Cellulose ether will remain the largest segment while starch and fermentation products jump at double-digit rates. This study analyzes the \$2.9 billion US natural polymer industry, with forecasts for 2012 and 2017 by market and product. It also evaluates company market share and profiles industry players.

#2422 11/2008..... \$4600

Engineering Plastics

US engineering plastic demand will rise 3.1% yearly through 2012, driven by the ongoing replacement of metal parts with high-performance plastic. ABS, polycarbonate and nylon will stay the largest volume types, with polycarbonate leading gains based on opportunities in motor vehicles, medical products and construction. This study analyzes the 4.7 billion pound US engineering plastic industry, with forecasts for 2012 and 2017 by resin and market. It also evaluates company market share and profiles industry players.

#2404 10/2008..... \$4600

Biodegradable Plastic

US demand for biodegradable plastic will grow 15.5% yearly through 2012. Gains will be driven by escalating costs for petroleum-based resins and growing initiatives that favor renewable resources. Polyester-based and polylactic acid resins will grow the fastest, while starch-based types remain the largest segment. This study analyzes the 350 million pound US biodegradable plastic industry, with forecasts for 2012 and 2017 by type and market. It also details market share and profiles industry players.

#2387 08/2008..... \$4600

Silicones

US silicone demand will rise 4.2% annually through 2012. Silicone fluids will lead gains based on their tendency to boost the performance of cosmetics and toiletries. The relatively small medical market will outpace all others. Silicone conditioning agents and emollients will be the fastest growing applications. This study analyzes the \$3.2 billion US silicone industry, with forecasts for 2012 and 2017 by product, market and application. It also evaluates company market share and profiles major players.

#2385 07/2008..... \$4500

Nanocomposites

US nanocomposites demand will grow 21% annually through 2011 as nanomaterial and composite prices decline. Higher-priced resins, such as engineering plastics used in applications where cost is not a critical factor, will lead gains. Packaging and motor vehicles will remain two key early markets. This study analyzes the \$860 million US nanocomposites industry, with forecasts for 2011, 2016 and 2025 presented by product, market and nanomaterial. It also details market share and profiles major firms.

#2303 02/2008..... \$4500

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