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Disposable Medical Supplies

US Industry Study with Forecasts for **2013 & 2018**

Study #2476 | July 2009 | \$4800 | 464 pages

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The home health care segment will outpace the key hospitals market as consumers broaden preventive medicine and self-treatment activities to save out-of-pocket health care costs.

US demand to increase 4.6% yearly through 2013

US demand for disposable medical supplies will increase 4.6 percent annually to \$59 billion in 2013. The best growth opportunities are anticipated in intermittent catheters for urinary drainage; dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; polymer and biological tissue sealants for wound closure; and daily contact lenses. All of these products offer significant therapeutic, infection prevention and/or convenience advantages over competitive supplies. Hospitals will remain the largest market for disposable medical supplies based on the complexity of procedures performed and stringent infection prevention requirements. However, the home health care market will grow faster as consumers broaden preventive medicine and self-treatment activities to save out-of-pocket health care costs.

Catheterization, drug delivery and related devices to remain key segment

Catheterization, drug delivery and related products will remain the largest and fastest expanding group of disposable medical supplies, with demand increasing 5.4 percent annually to \$17.5 billion in 2013. Gains will reflect a rising base of chronic care patients who require surgery or continuous therapy.



Discontinuation of Medicare reimbursement for catheter-linked health care-acquired infections (HAIs), along with a new federally funded effort aimed at reducing the overall occurrence of HAIs, will foster the expanding use of disposable catheters, drug delivery and related products in hospitals and clinics. Intermittent urinary catheters will fare especially well in the marketplace as, beginning in 2008, Medicare and many private health insurance plans substantially boosted coverage for these devices.

Advanced dressings to pace wound care supplies

Demand for wound management supplies will reach \$8.9 billion in 2013,

up 3.3 percent annually from 2008. The best growth opportunities are anticipated for highly absorbent alginate and foam, fast-healing collagen and growth factor, and new electricity-emitting dressings. Based on faster-healing advantages, these dressings will build applications in the treatment of moderate-to-severe lacerations. Tissue sealants composed of cyanoacrylates and bioengineered fibrins, along with new DNA-based sutures, will see the best demand gains among wound closures based on superior binding traits and fast healing advantages. Growth in the market for bandages will remain weak due to limited pricing flexibility and the lack of high value-added products.

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Sample Text, Table & Chart

WOUND MANAGEMENT SUPPLIES

Staples & Disposable Stapling Devices

Based on breadth of applications and performance advantages, the healing of minor-to-moderate surgical incisions and skin staples and disposable stapling devices will remain the second selling group and for these products to increase to \$2.0 billion in 2013. Advancements in wound closures, especially biocompatible tissue sealants.

Surgical closures use stainless steel, titanium and other metals. Surgical closures, especially biocompatible tissues, reconstruct organs, remove diseased tissue, occlude blood vessels and close skin incisions. Stainless steel varieties are indicated for healing incisions and lacerations on skin surfaces. Due to better biocompatibility and lack of interference with MRI (magnetic resonance imaging) procedures, titanium staples are usually preferred for internal closure applications. In addition to titanium, absorbable staples based on lactic acid and other copolymers are used to heal internal surgical incisions and wounds.

As wound closures, staples offer the advantages of reduced blood loss and tissue trauma. They also can be applied much more quickly than sutures. However, in closing rough and friable tissue, staples usually fail to prevent air and fluid leakage that can lead to complications, especially in lung-related surgeries.

Although sold separately, most staple demand is derived from pre-loaded disposable applicators. These products operate in a similar fashion as office staplers with available models holding between 15 and 55 individual wound closures. Staples are produced in six different sizes in both absorbable and removable formats. Associated supplies used in stapling procedures include clips and hemostats (such as fibrin glue) for constricting blood vessels and controlling hemorrhaging.

**SAMPLE
TEXT**

TABLE VII-4

DISPOSABLE NONWOVEN SURGICAL DRAPE DEMAND BY TYPE (million dollars)

Item	1998	2003	2008	2013	2018
Surgical Procedures (million)					7
\$ drapes/procedure					5
Nonwoven Surgical Drapes					0
General Surgery					0
Cardiovascular					5
Urological					5
Abdominal					5
Other					5
% drapes					8
Nonwoven Garments & Textiles					0

**SAMPLE
TABLE**

Driven by trends in the number and types of operating room procedures, nonwoven surgical drape demand is forecast to rise 3.6 percent annually to \$2.0 billion in 2013. Growth will also reflect increasing surgeon preferences for Level 3 and Level 4 textiles with enhanced barrier, resistance and comfort properties. These higher value-added drapes are being used in an expanding number of surgical procedures, even in many less invasive operations where they greatly exceed recommended infection prevention standards.

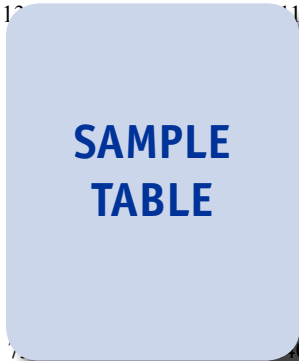
--Section VII, pg. 219

Sample Profile, Table & Forecast

TABLE V-18

INHALATION & ANESTHESIA DISPOSABLES DEMAND BY PRODUCT GROUP (million dollars)

Item	1998	2003	2008	2013	2018
Chronic Resp Conditions (million)	12	17	22	27	31.3
\$ inhalation & anesthesia/condition	1.5	2.0	2.5	3.0	3.7
Inhalation & Anesthesia Disposable	18.0	24.0	30.0	36.0	42.0
Prefillable Inhalers	1.0	1.5	2.0	2.5	3.0
Oxygen Therapy Supplies	1.0	1.5	2.0	2.5	3.0
Anesthesia Disposable	1.0	1.5	2.0	2.5	3.0
Nebulizers	1.0	1.5	2.0	2.5	3.0
Humidifiers	1.0	1.5	2.0	2.5	3.0
Other	1.0	1.5	2.0	2.5	3.0
% inhalation & anesthesia	1.1	1.5	2.0	2.5	3.0
Catheter, Drug Delivery & Related	7.0	9.0	11.0	13.0	15.0



COMPANY PROFILES

ConvaTec Incorporated

100 Headquarters Park Drive
 Skillman, NJ 08558
 908-904-2200
<http://www.convatec.com>

Annual Sales (2008) \$1.3 billion (2009)
 Employment 10,000

Key Products: Wound dressings and bandages, and skin cleansers

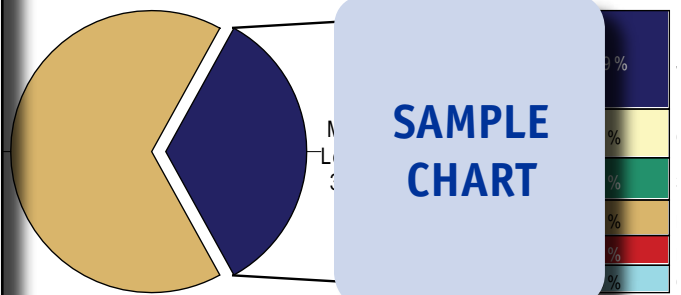


ConvaTec is a global marketer of ostomy, wound and skin care products owned by Nordic Capital Funder, which acquired ConvaTec from Bristol-Myers Squibb Company (New York, New York) in August 2008 for \$4.1 billion. In September 2008, ConvaTec acquired Unomedical A/S (Denmark), a manufacturer of single-use medical devices that had sales of \$365 million and employed 4,585 in 2007. Subsequent to this transaction, ConvaTec operates through four divisions: Ostomy Care, Wound Therapeutics, Continence and Critical Care, and Infusion Devices.

ConvaTec participates in the US disposable medical supplies industry via the manufacture of such single-use medical products as ostomy supplies, wound dressings and bandages, and skin cleansers and protectants. The Company manufactures these products at a plant in Greensboro, North Carolina. Among ConvaTec's ostomy products are skin barriers, one- and two-piece ostomy bags, and accessories. Skin barriers include STOMAHESIVE barriers, which are design to adhere to both dry and moist skin; DURAHESIVE barriers, which swell when exposed to liquids for increased skin protection; and CONVATEC

CHART X-1

US DISPOSABLE MEDICAL SUPPLIES MARKET SHARE BY COMPANY, 2008 (\$47.1 billion)



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OTHER STUDIES

Infection Prevention Products & Services

This study analyzes the US infection prevention industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by type (e.g., surgical drapes and gowns, disinfectants, sterilization supplies and equipment, gloves, face masks, medical waste disposal services, contract sterilization) and market (e.g., hospitals, outpatient facilities, doctor/dentist offices). The study also considers new policies, regulations and standards aimed at reducing HAIs, evaluates market share and profiles industry players.

#2526 08/2009..... \$4700

Food Safety Products in China

Food safety product demand in China will grow 15% yearly through 2013. Growth will be driven by ongoing food and beverage output gains, especially processed items, and more focus on food safety and supply chain security. Disinfection products will remain the largest segment while tracking products grow the fastest. This study analyzes the 6.5 billion yuan food safety product industry in China, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry participants.

#2525 07/2009..... \$5200

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products is forecast to increase 5.4 percent annually through 2013. Clinical chemistry and immunoassay will remain the top two IVD methodologies. Nucleic acid testing products will generate the fastest demand gains while endocrine condition testing remains the largest application. This study analyzes the \$17.6 billion US IVD industry, with forecasts for 2013 and 2018 by product, application and market. It also evaluates company market share and profiles industry players.

#2455 03/2009..... \$4800

Home Medical Equipment

US demand for home medical equipment will grow 5.5% annually through 2012. Cost-saving products such as CPAP machines, peritoneal dialysis equipment, IV pumps, ventilators and BP monitors will lead gains. Mobility devices, medical furniture and home safety equipment will continue to form sizeable markets. This study analyzes the \$7.7 billion US home medical equipment industry, with forecasts for 2012 and 2017 by equipment type. It also evaluates market share and profiles industry players.

#2447 01/2009..... \$4600

Dental Products in China

Demand for dental products in China will climb 11% annually through 2012. Toothpaste will continue to dominate the key consumer segment, while lower volume products such as whiteners, floss and dentures lead gains. The professional segment will outpace the consumer market, spurred by more dental visits per year. This study analyzes the 12.8 billion yuan dental product industry in China, with forecasts for 2012 and 2017 by product, raw material and region. It also evaluates market share and profiles industry players.

#2421 01/2009..... \$5100

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