Disposable Medical Supplies

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

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

Freedonia®

The Freedonia Group

767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Disposable Medical Supplies

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

Freedonia

Table of Contents

(continued on next page)

Click here to purchase online

Order now, click here!

Disposable Medical Supplies

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

INDUSTRY STRUCTURE

COMPANY PROFILES

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

RAW MATERIALS

PRODUCT OVERVIEW

CATHETERIZATION, DRUG DELIVERY & RELATED DEVICES

WOUND MANAGEMENT SUPPLIES

NONWOVEN MEDICAL DISPOSABLES

OTHER DISPOSABLE MEDICAL SUPPLIES

MARKETS

INDUSTRY STRUCTURE

Disposable Medical Supplies

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

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.

US Disposable Medical Supplies Demand, 2008

($47.1 billion)

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.

Sample Text, Table & Chart

TABLE VII-4

DISPOSABLE NONWOVEN SURGICAL DRAPE DEMAND BY TYPE (million dollars)

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

SAMPLE TABLE

WOUND MANAGEMENT SUPPLIES

Staples & Disposable Stapling Devices

Based on breadth of applications and performance adva
the healing of minor-to-moderate surgical incisions and skin
staples and disposable stapling devices will remain the secon
selling grou ... and for these products
to increase ... billion in 2013. Adv
complemen ... closures, especially bi
tissue seala ... ns.

SAMPLE TEXT

Surgic ... ss steel, titanium and
closures use ... nal 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.

173

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

Disposable Medical Supplies

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

Freedonia®

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)	1[illegible]				[illegible]1.3
$ inhalation & anesthesia/condition					[illegible].7
Inhalation & Anesthesia Disposables					[illegible]60
Prefillable Inhalers					[illegible]50
Oxygen Therapy Supplies					[illegible]95
Anesthesia Disposables					[illegible]75
Nebulizers					[illegible]15
Humidifiers					[illegible]95
Other					[illegible]30
% inhalation & anesthesia					[illegible].1
Catheter, Drug Delivery & Related	7[illegible]				[illegible]400

SAMPLE TABLE

COMPANY PROFILES

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

Annual S[illegible] 3/09)
Employ[illegible]

Key Pro[illegible] and bandages, and skin clea[illegible]

SAMPLE PROFILE

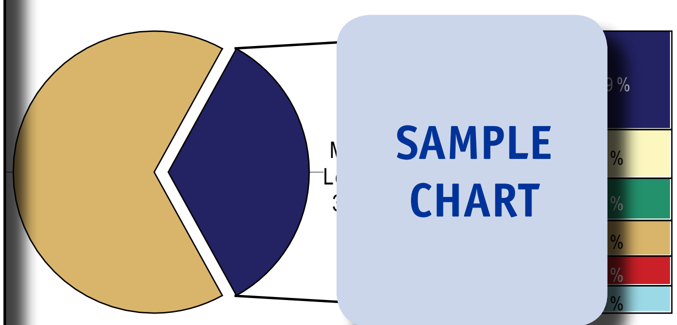
Co[illegible] rketer of ostomy, wound a[illegible] wned by Nordic Capital F[illegible] ners, which acquired ConvaTec from Bristol-Myers Squibb Company (New York, New York) in August 2008 for $4.1 billion. In September 2008, ConvaTec acquired Unomedical A/S (Denmark), a manufacturer of single-use medical 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

400

CHART X-1

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



Click here to purchase online

Order now, click here!

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping
There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US
Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders
For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%
If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License
Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2300, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2476

Disposable Medical Supplies.................................. $4800

☐ Corporate Use License (add to study price) * +$2300

___ Additional Print Copies @ $500 each *

Total (including selected option) $________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

Credit Card # ________________

Expiration MM YY

Signature ________________

Name ________________

Title ________________

Company ________________

Division ________________

Street ________________ (No PO Box please)

City/State/Zip ________________

Country ________________

Phone ________________ Fax ________________

Email ________________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement
The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ________________

☐ Individual Use License Agreement
The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2300; one additional user, add $500; two additional users, add $1000; three additional users, add $1500.

Signature ________________

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com

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

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unibiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

• Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research

Click here for complete title list

Click here to visit freedoniagroup.com

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com