

## NEW US industry forecasts for 2013 & 2018

# Infection Prevention Products & Services

Study # 2526

August 2009

\$4700

### US demand to grow 4.5% annually through 2013

The Freedonia Group projects that total demand for infection prevention products and services will increase 4.5 percent annually through 2013. Growth will partially reflect the impact of new government legislation and changing health insurance reimbursement policies aimed at reducing the incidence of health care-acquired infections (HAIs). Gains will also be driven by efforts to reduce the incidence of HAIs in health care and life science establishments, prompting upgrades to standards involving patient and staff hygiene and protection, facility cleaning and disinfection, device and instrument sterilization, and medical waste collection and disposal.

### Safety-enhanced devices to offer best opportunities

Safety-enhanced devices for IV and injectable drug delivery and *in vivo* fluid withdrawal, along with high quality apparel, textiles and disinfectants for surgical procedures, will remain the top selling groups of infection prevention products. An increasing percentage of the syringes, catheters, IV administration sets, blood collection supplies and other disposable sharp instruments employed by the medical community will incorporate safety components designed to prevent accidental needlesticks and associated infections after use. Spurred by a rising volume of inpatient, outpatient, nursing home care and home health care episodes, demand for safety-enhanced medical devices is projected to rise 6.2 percent annually through 2013.



The elevated risk of transmitting air- and blood-borne infections during surgery will foster the expanding use of high barrier drapes, gowns and gloves and high level disinfectants in hospital and ambulatory operating rooms. In addition, upgraded infection prevention standards will encourage the immediate changing of apparel and textiles that are heavily splattered with blood or other body fluids during surgical procedures. Based on upward trends in the volume and mix of operations, the total market for surgical infection prevention products is forecast to grow 3.6 percent annually through 2013. Cost containment pressures and advances in less invasive surgical techniques will moderate faster growth.

Personal, surface and instrument disinfectants consumed by health care and life science facilities will grow 4.0 percent annually through 2013. Pressures to

adopt stricter patient and staff hygiene and facility cleaning and disinfection practices will foster gains in health care establishments. Disinfectant use in the life sciences sector will expand as production systems and research and diagnostic investigations become increasingly complex and more vulnerable to microbial contamination.

Health care and life science markets for sterilization supplies, equipment and services will expand 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 promote the rising use of examination and laboratory gloves and other protective apparel in the health care and life science sectors. However, multiple source availability and downward pricing pressures will moderate overall growth opportunities for these products. Lastly, the widespread upgrading of medical and life science infection prevention standards, coupled with continuing restrictions on onsite incineration, will create above average growth opportunities for medical waste disposal supplies, equipment and services.

### Study coverage

**Infection Prevention Products & Services** is a new Freedonia industry study priced at \$4700. It presents US historical demand data (1998, 2003 and 2008) plus forecasts for 2013 and 2018 by product and market. The study also considers market environment factors, evaluates company market share data and profiles 26 industry competitors.

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## Company Profiles

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

**COMPANY PROFILES**  
 Profiles for 26 competitors in the US industry including Cardinal Health, Covidien, Kimberly-Clark, Medline, STERIS and 3M

**PRODUCTS & SERVICES**

**Surgical Gloves**

Demand for surgical gloves is expected to increase by 1.5 percent yearly to 1.5 billion units, as a result of the widespread adoption of gloves in the operating room to foster infection control. The market is expected to continue to grow as a result of the increasing use of gloves in the operating room. The market is expected to continue to grow as a result of the increasing use of gloves in the operating room.

Companies in the market are expected to continue to grow as a result of the increasing use of gloves in the operating room. The market is expected to continue to grow as a result of the increasing use of gloves in the operating room.

Hypoallergenic, powder-free, sterile and heavy duty are among the major types of surgical gloves on the market. In spite of their allergy linkage, latex brands continue to dominate the market, making up over 80 percent of the value of demand generated in 2008. In spite of advances in alternative synthetic materials, surgeons and other operating room personnel are retaining preferences for latex gloves based on their fit, comfort, movement flexibility and strong barrier properties.

Producers of latex gloves have resolved the allergy issue by developing new powder-free varieties. Powder, primarily cornstarch derivatives, serves as a lubricant that promotes easy glove donning. When subjected to sterilization, powder particles break down and are absorbed into the latex. When coming into contact with the skin, the absorbed particles can abrade tissues and cause allergic reactions in both staff and patients.

To reduce the potential of latex surgical gloves to cause allergies while maintaining needed fit, comfort and easy donning features, producers have substituted polymeric coatings for cornstarch powder. For example, in 2007 Ansell

**SAMPLE PAGE**  
 Explanations that support each table's data and forecasts

**MARKETS**

**TABLE IV-9**  
**LIFE SCIENCE MARKET -- INFECTION PREVENTION PRODUCTS & SERVICES DEMAND BY TYPE (million dollars)**

Item	1998	2003	2008	2013	2018
Number of Life Science Facilities					300
000\$ infection prevention/facility					62
Life Science Market Demand					100
Supplies:					92
Apparel & Textiles					08
Face Masks					64
Other					44
Disinfectants					04
Hand Sanitizers					48
Surface Disinfectants					36
Instrument Disinfectants					20
Sterilization Supplies					55
Laboratory Gloves					24
Med Waste Disposal Supplies					01
Infection Prevention Equipment					58
Infection Prevention Services					50

**SAMPLE TABLE**  
 Historical data for 1998, 2003 and 2008 as well as Freedonia forecasts for 2013 and 2018; data illustrated with the aid of more than 70 tables and charts

**Life Science Market**

Demand for infection prevention market will see annual gains through 2018. 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

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## Freedonia's methods involve:

- Establishing consistent economic and market forecasts
- Using input/output ratios, flow charts and other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts and end users
- Researching a proprietary database that includes trade publications, government reports and corporate literature

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## 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

## Disposable Medical Supplies

This study analyzes the US disposable medical supply industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by type (e.g., drug delivery and catheterization; wound management supplies; nonwoven medical disposables), market (e.g., hospitals, home health care, outpatient facilities, physicians' offices), and material (e.g., plastic resins, chemicals and biochemicals, nonwoven fabrics). The study also considers market environment factors, evaluates market share and profiles industry players.

#2476..... 07/2009..... \$4800

## 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

## Food Safety Products

US demand for food safety products will grow 6.5% annually through 2012, driven by rising food safety concerns and new rules and regulations. Disinfection products will remain the largest segment and benefit from relatively new technologies such as ultraviolet and ozone equipment. Smart labels and tags will be the fastest growing products. This study analyzes the \$2.3 billion US food safety product industry, with forecasts for 2012 and 2017 by product and market. It also details market share and profiles major firms.

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