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photo: Crown Dental and Medical

Infection Prevention Products & Services

US Industry Study with Forecasts for **2015 & 2020**

Study #2783 | September 2011 | \$4900 | 297 pages

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Demand gains will be based on quality, performance, safety and/or convenience advantages over alternative products and services, or because of faster expanding end-use applications.

US demand to rise 4.9% annually through 2015

US demand for infection prevention products and services is forecast to increase 4.9 percent annually to \$21.2 billion in 2015. Better than average growth opportunities are projected for nitrile examination gloves, synthetic surgical gloves, cardiovascular surgical drapes, nonwoven and other surgical gowns, safety-enhanced catheters and hypodermic syringes, waterless hand sanitizers, high-level surface disinfectants, ortho-phthalaldehyde (OPA) and peracetic acid instrument disinfectants, biological sterilization indicators, medical waste containers and accessories, medical waste disposal services and contract sterilization services. These products and services will gain demand based on quality, performance, safety and/or convenience advantages over alternative offerings or because of faster expanding end-use applications.

Nitrile examination gloves, safety catheters & syringes among best opportunities

Nitrile examination and synthetic surgical gloves will fare well in the marketplace as they pose a lower risk of causing allergic reactions in staff than do latex gloves. Cardiovascular surgical drapes will see above average growth in demand based on the expanding prevalence of heart conditions requiring surgical intervention. The market for nonwoven and other surgical gowns will

US Infection Prevention Products & Services Demand, 2010 (\$16.7 billion)



Infection Prevention Supplies
76%

Equipment 5%

Infection Prevention Services
19%

photo: Prestige Dental Care

benefit from upward trends in the volume of surgical procedures and increasing physicians' preferences for higher quality types. Safety-enhanced catheters and hypodermic syringes will post above average growth based on performance advantages over standard devices in the prevention of catheter-linked infections and accidental needlesticks.

Convenience benefits and adaptability to usage anywhere will promote the substitution of waterless hand sanitizers for formulations that require rinsing with water. Enhanced destructive actions against pathogens will boost demand for high-level disinfectants. Performance, compatibility and ease-of-use advantages over glutaraldehyde will impact

favorably on growth opportunities for OPA disinfectants in instrument reprocessing. Applications in the reprocessing of endoscopes and dialyzers will drive up demand for peracetic acid disinfectants. Improved quality assurance results will broaden the use of biological indicators in sterilization processes. Above average growth in demand for waste disposal products and services will reflect the adoption of stricter safety standards governing the collection and removal of infectious materials. Lastly, cost and convenience advantages in the preparation of sterile products for shipment will broaden the use of contract sterilization services by medical supply and device suppliers.

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Sample Text, Table & Chart

PRODUCTS & SERVICES

Urinary Catheters: Boosted by expanded Medicare coverage which began in 2008, safety-enhanced urinary catheters will have strong growth opportunities. Demand for these devices is forecast to increase to 98 million units, valued at almost \$1 billion, by 2015. The treatment of hospital, nursing home, and ambulatory care patients who are immobilized or cannot urinate normally has a long history of widespread reuse of urinary catheters. In an attempt to reduce the incidence of catheter-associated urinary tract infections (CAUTIs) and Hospital-Acquired Infections (HAIs), Medicare and Medicaid Services broadened its coverage for intermittent catheterization from one per week to 200 per month. Although this change in reimbursement policy does not apply to indwelling urinary catheters, infection prevention considerations will prompt the more frequent changing of these devices in hospitals and nursing homes.

The top-selling safety-enhanced urinary catheters are Foley balloon configurations. Used primarily for hospital and incapacitated home and nursing home patients, these devices are projected to fare well in the US marketplace based on the upgrading of infection prevention standards by medical providers. Advances in minimally invasive procedures will moderate even faster gains by reducing the need for Foley catheters in some surgery and post-surgical recovery cases.

Intended for indwelling applications, the Foley catheter provides for the continuous bladder drainage of surgical and other immobilized patients. A balloon located on one end of the device is inserted into the bladder and inflated to hold the catheter in place. The opposite end is connected to a collection bag. Once the device is installed, urine flows from the bladder to the external container. In many Foley catheters, the level of urine output is measured for diagnostic purposes by a graduated meter.

93

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TABLE IV-14

SAFETY-ENHANCED CATHETER DEMAND BY TYPE

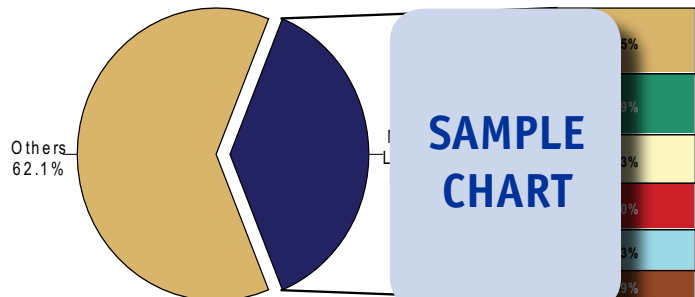
Item	2000	2005	2010	2015	2020
Hospital Admissions (mil) safety-enhanced catheters/admission					
Safety-Enhanced Catheters (mil units)					
Urinary Catheters					
IV & Other Catheters					
\$/unit					
Safety-Enhanced Catheters (mil \$)					
Urinary Catheters					
IV & Other Catheters					
% catheters					
Safety-Enhanced Medical Devices (mil \$)					

SAMPLE
 TABLE

SAMPLE
 TEXT

CHART VI-1

INFECTION PREVENTION PRODUCTS MARKET SHARE
 BY TOP COMPANIES
 (\$13.5 billion, 2010)



SAMPLE
 CHART

Sample Profile, Table & Forecast

TABLE V-3
HOSPITAL INFECTION PREVENTION DEMAND BY TYPE
 (million dollars)

Item	2000	2005	2010	2015	2020
Number of Hospitals					
mil \$ infection prevention/hospital					
Hospital Market Demand					
Infection Prevention Supplies:					
Apparel & Textiles					
Safety-Enhanced Devices					
Sterilization Supplies					
Disinfectants					
Medical Waste Disposal Products					
Infection Prevention Equipment					
Infection Prevention Services					
% hospitals					
Infection Prevention Health Care Mkts & Svc					



COMPANY PROFILES

GOJO Industries Incorporated

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

Annual Sales:
 Employment:

Key Products: _____ and other products

GOJO Industries is a leading manufacturer and supplier of hand hygiene and related skin care products for commercial, industrial and institutional use. The Company's product offerings consist of instant hand sanitizers, hand soaps, lotions and other hand care products. In addition, the privately held company supplies dispensing systems and related accessories for use with its hand care products.

GOJO Industries participates in the US infection prevention industry through the manufacture of hand sanitizers, soaps and surgical scrubs for the acute-care, long-term care, alternative care and other health care facilities. Hand sanitizers from the Company are alcohol-based and marketed under the PURELL brand name. These products are formulated to kill 99.99 percent of most common disease-causing pathogens in as little as 15 seconds and do not require the use of water or towels. Moreover, they are compatible with latex, nitrile and vinyl medical gloves. PURELL hand sanitizers are available in such varieties as instant hand sanitizer gel with DERMAGLYCERIN SYSTEM one-step sanitizing and moisturizing formula, instant hand sanitizer gel with aloe, instant hand sanitizer foam, instant hand sanitizer skin nourishing foam designed for frequent use by health care workers, and sanitizing hand wipes.

"An increasing volume of admissions, inpatient days, surgical procedures, emergency visits and institutional-based ambulatory consultations, coupled with the phasing-in of HHS Action Plan recommendations, will boost hospital demand for infection prevention products and services 4.6 percent annually to \$11.6 billion in 2015. The impact of group purchasing practices and cost containment initiatives will moderate faster gains."

--Section V, pg. 185-6

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OTHER STUDIES

World Nonwovens

This study analyzes the world nonwovens industry. It presents historical demand data for the years 2000, 2005 and 2010, with forecasts for 2015 and 2020 by formation process (e.g., spunmelt, carded, airlaid, wetlaid), application (disposables, nondisposables), market (e.g., personal hygiene, wipes, construction, filtration, medical/surgical), world region and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.
 #2816 November 2011 \$5900

Biologics

US demand for biologics is expected to grow 6.5 percent annually through 2015, driven by dramatic shifts in production technology and more targeted diseases such as cancer, diabetes and other serious medical conditions. Monoclonal antibodies will remain the largest category and be one of the fastest growing segments, outpaced only by hormones. This study analyzes the \$74.3 billion US biologics industry, with forecasts for 2015 and 2020 by product and application. The study also evaluates company market share and profiles industry competitors.
 #2792 September 2011 \$4900

Excipients

US excipients demand will advance 3.9 percent yearly through 2015, driven by continued growth in US pharmaceutical production and the increasing importance of excipients in drug formulation. Polymers will remain the top-selling type based on their use as fillers and binders in tablets. Fillers and diluents will remain the leading application and grow the fastest. This study analyzes the \$1.5 billion US excipients industry, with forecasts for 2015 and 2020 by product and application. The study also evaluates company market share and profiles industry players.
 #2736 May 2011 \$4800

World Disposable Medical Supplies

Global demand for disposable medical supplies will increase 5.6 percent annually through 2014, with developed countries accounting for nearly three-fourths of the market. Wound management supplies will remain the top-selling group while diagnostic and laboratory disposables grow the fastest. This study analyzes the \$125 billion world disposable medical supply industry, with forecasts for 2014 and 2019 by product, world region and for 14 countries. It also evaluates company market share and profiles industry competitors.
 #2691 December 2010 \$5900

Vaccines

US demand for vaccines will advance 5.6 percent annually through 2014, driven by the development of new vaccines to treat complex human diseases, such as cancer. Public health recommendations for adult and adolescent immunization will produce continued strong sales in this segment, which has reached the level of pediatric vaccines sales. This study analyzes the \$10.8 billion US vaccines industry, with forecasts for 2014 and 2019 by product. It also evaluates company market share and profiles US industry competitors.
 #2667 August 2010 \$4700

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