Disposable Medical Supplies

Industry Study with Forecasts for 2016 & 2021

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Disposable Medical Supplies
Industry Study with Forecasts for 2016 & 2021

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US demand to reach $46.7 billion in 2016

US demand for disposable medical supplies is forecast to increase 4.3 percent annually to $46.7 billion in 2016. Growth will be promoted by an expanding volume of patient care activity spurred by aging demographic patterns, a rising incidence of diseases and disorders, and the extension of health insurance coverage by the Affordable Care Act of 2010 (if left unmodified and phased in according to schedule).

Demand for disposable medical supplies will also build upward momentum as hospitals, outpatient facilities and other health care establishments adopt stricter infection prevention safeguards to meet standards recommended by the Centers for Disease Control and Prevention (CDC) and the Joint Commission on the Accreditation of Healthcare Organizations (JCAHO). Health care cost containment pressures will remain the major moderating influence on growth in the US disposable medical supplies market.

Drug delivery devices to remain largest, fastest growing

Drug delivery devices will remain the largest and fastest growing group of disposable medical supplies, with demand reaching $12.2 billion in 2016. Growth will reflect an expanding number of chronic care patients who require surgery or continuous therapy. This trend, coupled with the introduction of new higher value-added, safety enhanced products, will boost demand for several single use products, including prefillable syringes and inhalers, intravenous catheters, oxygen therapy disposables, hemodialysis bloodlines and peritoneal dialysis kits.

Tissue sealants lead wound management supplies gains

US demand for wound management supplies will reach $10.1 billion in 2016. Tissue sealants composed of polymers and bioengineered substances, along with alginate, foam, collagen and growth factor wound dressings, will exhibit the fastest gains based on safe and effective healing properties. Conversely, demand for bandages will expand at a below average pace due to limited pricing flexibility and the overall lack of proprietary types. First aid kits will fare the best among products in this group, building momentum from trends promoting self-treatment.

Class IV surgical drapes and gowns will net the best sales gains among non-woven medical textiles as infection prevention safeguards are upgraded by hospitals and ambulatory surgery centers. Disposable face masks will also fare well in the marketplace, benefiting from routine use by medical providers in direct contact patient procedures. New enhanced absorbent, odor neutralized undergarments and shields will see the fastest gains in demand among incontinence products based on comfort and protection advantages.
NONWOVEN MEDICAL DISPOSABLES

Surgical Drapes

Demand for nonwoven surgical drapes is forecast to reach $1.5 billion in 2016, up 4.5 percent annually from 2011. Increasing numbers of surgeons for higher quality textiles with stronger barrier and resistance properties will drive gains, though advances in less invasive procedures will limit draping requirements in many surgical applications.

Surgical drapes are divided into four classes based on barrier protection criteria set by the Association for the Advancement of Medical Instrumentation (AAMI). Level 1 drapes meet the minimum standards for resistance, while Level 4 textiles provide the strongest resistance.

In addition to barrier protection, surgical drapes are subject to guidelines established by the Association of Operating Room Nurses (AORN) and other medical groups for tear, linting and combustion resistance as well as patient and staff comfort. Tear and linting resistance are important because loosened textiles can provide a vehicle for transmitting pathogens. Due to the presence of heat sources, oxygen and compounds, surgical suites are vulnerable to potential fire breakout. Therefore, safety considerations dictate that surgical drapes are...
Sample Profile, Table & Forecast

STERIS is active in the US disposable medical supplies industry through the Healthcare segment, which had revenues of $836 million in FY 2011. Through this segment, the Company manufactures and sells equipment, accessories, consumables and services for acute care hospitals, surgery centers and other health care providers. Among the Healthcare segment’s disposable and consumable offerings are biological and chemical indicators and waste disposal containers.

STERIS manufactures biological and chemical indicators that test the effectiveness of sterilization procedures. These indicators are designed for use with specific sterilization systems and procedures. The Company’s biological indicators include SPORDI, SPORDEX and

---

“Demand for adhesive bandages will reach $1 billion in 2016, up 2.7 percent annually from 2011. The first aid treatment of minor injuries will dominate usage, accounting for sizable sales levels in consumer and professional health care markets. The introduction of new and upgraded products will impact favorably on future growth opportunities for adhesive bandages. However, the overall market for these disposables will increase at a comparatively slow pace due to ...”

---Section VI, pg. 154
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