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# Disposable Medical Supplies

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Industry Study with Forecasts for **2016 & 2021**

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Study #2853 | March 2012 | \$5100 | 417 pages

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*A greater volume of patient care activity, a growing incidence of diseases and disorders, and stricter infection prevention safeguards will benefit demand for disposable medical supplies.*

## 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.

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## Sample Text, Table & Chart

### NONWOVEN MEDICAL DISPOSABLES

#### Surgical Drapes

Demand for nonwoven surgical drapes is forecast to reach 1.2 billion in 2016, up from 1.1 billion in 2011. Increasing numbers of surgeons favor drapes with stronger barrier and wicking properties with the use of advanced materials. Advances in less expensive procedures will also drive demand in many surgical applications.

**SAMPLE TEXT**

Surgical drapes are used to minimize the transmission of pathogens between non-sterile and sterile areas in the operating room. A common surgical procedure employs drapes to assure effective infection prevention. Two or more large sheets are normally positioned around incision or wound sites. Additionally, several larger drapes typically surround a large portion of the surgical table. In general, the number of drapes and the dimensions of the sterile field required increase with the complexity and invasive nature of the surgical procedure.

Surgical drapes are divided into four classes based on barrier protection criteria set by the Association for the Advancement of Medical Instrumentation (AAMI). Barrier protection is measured by the degree to which the textile resists the penetration of blood and other bodily fluids. 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 combing 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, oxygenated compounds, surgical suites are vulnerable to potential fire burn. Therefore, safety considerations dictate that surgical drapes be flame resistant.

195

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TABLE V-8

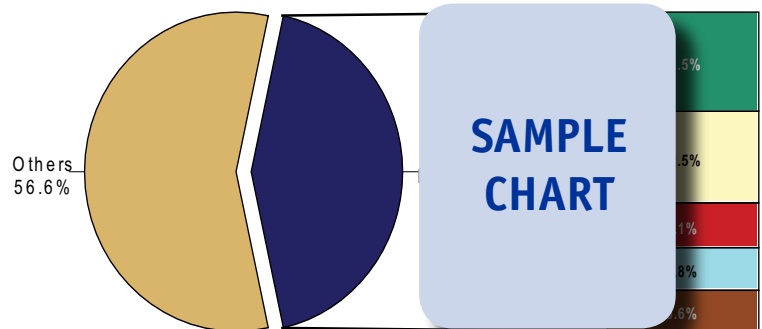
PREFILLABLE SYRINGES DEMAND BY TYPE

Item	2001	2006	2011	2016	2021
Acute & Chronic Conditions (million) prefillable syringes/condition					
Prefillable Syringes Demand (mil units)					
Injectors					
Cartridges					
cents/unit					
Prefillable Syringes Demand (mil \$)					
Injectors					
Cartridges					
% prefillable syringes					
Hypodermic Products Demand (mil \$)					

**SAMPLE TABLE**

CHART X-1

US DISPOSABLE MEDICAL SUPPLIES MARKET SHARE BY COMPANY (\$37.8 billion, 2011)

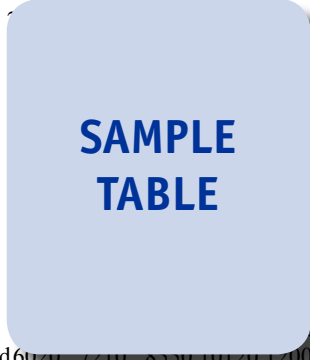


**SAMPLE CHART**

## Sample Profile, Table & Forecast

**TABLE VI-7**  
**DISPOSABLE BANDAGES DEMAND BY PRODUCT GROUP**  
 (million dollars)

Item	2001	2006	2011	2016	2021
Resident Population (million)					
\$ disposable bandages/capita					
Disposable Bandages Demand					
Adhesive Bandages					
Adhesive Tapes					
Cast Bandages & Accessories					
Gauze Bandages					
Pads & Compresses					
Other					
% disposable bandages					
Wound Management Supplies Demand	6020	7210	8350	10120	12000



**COMPANY PROFILES**

**STERIS Corporation**  
 5960 Heisley Road  
 Mentor, OH 44060  
 440-354-7000  
 http://www.steris.com

Revenue  
 US Revenue  
 Employees

Key Products: Surgical instruments and medical waste disposal

STERIS develops, manufactures and markets infection prevention, contamination control, microbial reduction and surgical support systems, products and technologies for the global health care, scientific research, food and industrial markets. The Company operates through four segments: Healthcare, Life Sciences, STERIS Isomedix Services, and Corporate and Other.

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

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"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 up-graded 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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**OTHER STUDIES**

**Animal Health Products**

US demand for animal health products will rise 3.5 percent yearly to \$12.7 billion in 2016. Vaccines and diagnostics will be the fastest growing types, while nutritional chemicals and parasiticides will continue to account for the largest share of demand. Livestock and poultry will remain the dominant animal class, while the pet segment will lead gains. This study analyzes the \$10.7 billion US animal health product industry, with forecasts for 2016 and 2021 by product, market, and animal class. The study also evaluates company market share and profiles industry players.  
 #2990 ..... February 2013 ..... \$5100

**Nonwovens**

Demand for nonwovens is forecast to rise 5.7% per year to \$7.1 billion in 2016. The fastest market gains will occur in the nondisposables market, especially construction. Disposables will remain the dominant market, where filtration will lead gains. Spunmelt nonwovens will continue as the largest product segment and carded will be the second largest. This study analyzes the \$5.4 billion US nonwoven fabric industry, with forecasts for 2016 and 2021 by material, process and market. The study also evaluates company market share and profiles industry players.  
 #2983 ..... January 2013 ..... \$5200

**World Disposable Medical Supplies**

World demand for disposable medical supplies will rise 6.2 percent annually to \$198 billion in 2016. The US and China will be the largest markets, while India will lead gains. Dialysis disposables, diagnostic and lab disposables, respiratory supplies and devices and infusion devices will be among the fastest growing types. This study analyzes the \$146.5 billion world disposable medical supply industry, with forecasts for 2016 and 2021 by product, world region and for 15 major countries. The study also evaluates company market share and profiles industry competitors.  
 #2951 ..... October 2012 ..... \$6200

**World Wound Management Products**

World demand for wound management products will increase 5.3 percent annually to \$39.3 billion in 2016. China will be the fastest growing market. Developed countries, led by the US, will remain a much larger market than developing countries. Wound healing agents and wound dressings will be among the fastest growing products. This study analyzes the \$30.3 billion world wound management product industry, with forecasts for 2016 and 2021 by type, world region and for 10 countries. The study also evaluates company market share and profiles industry players.  
 #2893 ..... May 2012 ..... \$6100

**Drug Delivery Products**

US drug delivery product demand will rise 7.4 percent yearly to \$134 billion in 2015. Parenteral products will grow the fastest, led by monoclonal antibodies and polymer-encapsulated medicines. Other types expected to do well include prefilled dry powder and metered dose brachytherapy implants, and implantable drug delivery products. This study analyzes the \$93.8 billion US drug delivery system industry, with forecasts for 2015 and 2020 by material, product and application. The study also evaluates company market share and profiles industry players.  
 #2829 ..... January 2012 ..... \$4800

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