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World Wound Management Products

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

Study #2893 | May 2012 | \$6100 | 346 pages

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Gains will be driven by an expanding volume of surgical procedures, a rising incidence of treated injuries and external skin conditions, and new product introductions.

World demand to rise 5.3% annually through 2016

World demand for wound management products will increase 5.3 percent annually to \$39.3 billion in 2016, serving a \$9.3 trillion worldwide health care industry. An expanding volume of surgical procedures, coupled with a rising incidence of treated injuries and external skin conditions, will underlie gains. Growth will also benefit from new product introductions, especially negative pressure therapy systems, skin replacements, tissue sealants, and wound healing agents.

US to remain largest market, China to lead gains

China will account for the fastest growth in wound management product demand among all countries. Increasing economic prosperity will enable its health care sector to expand and diversify resources and capabilities, and accommodate an expanding volume of patients. Similar trends will create above average growth opportunities for wound management products in several other developing countries.

Led by the United States, the developed countries will continue to absorb a much larger share of total world wound management product demand than the developing countries. This trend will reflect the advanced nature of medical delivery systems, widespread coverage of residents for essential patient treat-

World Wound Management Product Demand, 2016 (\$39.3 billion)

photo: Avery Dennison



North America
36%

Western Europe
24%

Asia/Pacific
23%

Other Regions
17%

ment, and increasing preferences of medical providers for high value added supplies and devices. Because of a higher degree of market penetration, total demand for wound management products in the developed countries will grow at a considerably slower pace than in the developing countries.

Wound closures, bandages to remain largest segments

Wound closures will post world demand of \$15.2 billion in 2016, up 4.3 percent annually from 2011. Tissue sealants will see the fastest gains, spurred by improvements in available products and speed advantages in the closing of minor surgical incisions and wounds. Nonethe-

less, sutures and staples will continue to dominate world wound closure demand based on well established performance results in major surgery.

World demand for bandages is forecast to increase 4.5 percent per year to nearly \$10 billion in 2016. Gains will reflect expanding applications in self-treatment, sports medicine, and chronic care. Specialty bandages for the professional treatment of injuries and orthopedic conditions will account for the fastest growth in demand. Multiple supplier competition and price sensitivity will hold down growth opportunities for most other bandages.

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Sample Text,
 Table & Chart

ASIA/PACIFIC

China: Wound Management Product Demand

Total demand for wound management products in China is expected to increase almost 10% from 2011 to 2016. This growth is driven by improving availability of health care services, increasing health care spending, and will underlie growth in surgical procedures, hospital admissions, and patient consultation capabilities in surgical hospitals. Hospital services are expected to integrate the delivery of operations for inpatient and outpatient services. As a result, residents usually go to the hospital to receive outpatient consultations and surgical health care treatments.

SAMPLE
 TEXT

Due to persisting imbalances in the distribution of health resources, China's per capita consumption of wound management products will remain slightly below developing world norms through 2021. Moreover, demand will remain concentrated in commodity based consumables, supplies, and devices as only a small percentage of the population have access to advanced procedures such as open heart surgery, hyperbaric oxygen pressure therapy, and bioengineered skin replacements. The need for many individuals to self-treat injuries and skin conditions will keep a large share of Chinese wound management product sales in basic bandages, dressings, and anti-infective wound healing agents. The country's demand for higher value added products, such as bioengineered growth factors, foam and alginate wound dressings, and vacuum-assisted closure treatment equipment, will remain negligible, at least in the near term.

Small to medium sized domestic producers of commodity products such as wound closures, bandages, wound dressings, and wound healing agents dominate the supply of wound management products in China. Major suppliers with manufacturing sites in the country include Ederma, Melsungen, which operates a plant in Suzhou; Derma Science

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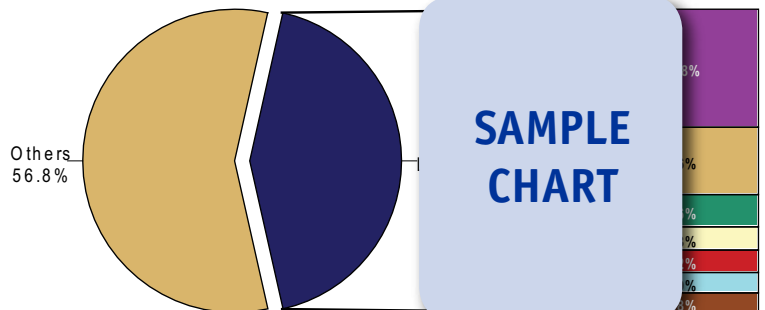
TABLE VI-3
 CHINA:
 WOUND MANAGEMENT INDICATORS

Item	2001	2006	2011	2016	2021
Population (million)	1,212	1,328	1,368	1,408	1,448
% 50 years & older	11.2	11.8	12.4	13.0	13.6
Population 50 Years & Older (million)	135	157	170	183	197
50 to 64 Years	65	75	80	85	90
65 Years & Older	70	82	90	98	107
per capita GDP	1,050	2,810	4,560	6,310	8,060
Gross Domestic Product (bil 2010\$)	10,500	78,100	208,000	450,000	700,000
\$ health expenditures/capita	10	25	45	70	95
Health Expenditures (bil \$)	10	33	63	100	139
hospital admissions/000 capita	0.1	0.2	0.3	0.4	0.5
Hospital Admissions (000)	121	265	410	565	720
surgical procedures/000 capita	0.05	0.1	0.15	0.2	0.25
Surgical Procedures (000)	60	133	205	282	362
outpatient consultations/capita	0.5	0.6	0.7	0.8	0.9
Outpatient Consultations (million)	606	797	965	1,127	1,297

SAMPLE
 TABLE

CHART VIII-1

WORLD WOUND MANAGEMENT PRODUCT
 MARKET SHARE BY COMPANY, 2011
 (\$30.3 billion)



SAMPLE
 CHART

**Sample Profile,
 Table & Forecast**

COMPANY PROFILES

AccessClosure Incorporated

645 Clyde Avenue
 Mountain View, CA 94043
 650-903-1000
<http://www.accessclosure.com>

Annual Revenue:
 Employment:

Key Products:

AccessClosure is based on the development and production of vascular access site closure and wound management technologies. The Company is privately held.

AccessClosure is active in the world wound management product industry through the development and production of MYNX vascular closure devices, which are made in two sizes and are intended to provide immediate hemostasis at the puncture site. MYNX products are based on a conformable, water-soluble polyethylene glycol sealant formulated to expand in the tissue tract by absorbing blood and subcutaneous fluids. The sealant dissolves within 30 days.

In addition to standard MYNX offerings, AccessClosure makes the MYNXGRIP and MYNX CADENCE vascular closure devices. The MYNXGRIP vascular closure device, which was introduced in February 2012, uses the Company's proprietary GRIP TECHNOLOGY to actively grip and seal the arteriotomy while expanding and filling the tissue tract. The MYNX CADENCE product, which debuted in January 2011, is engineered for smooth deployment.

**SAMPLE
 PROFILE**

TABLE VI-4

**CHINA: WOUND MANAGEMENT PRODUCT DEMAND
 (million dollars)**

Item	2001	2006	2011	2016	2021
Health Expenditures (bil \$)					
\$ products/000\$ health expenditures					
Wound Management Product Demand					
Wound Closures:					
Sutures & Accessories					
Staples & Stapling Devices					
Tissue Sealants					
Hemostats/Other Wound Closures					
Bandages:					
Adhesive Bandages & Tapes					
Other Bandages					
Wound Dressings:					
Biological & Synthetic Dressings					
Non-Adherent Dressings					
Wound Healing Agents					
Other Wound Management Products					
% China					
Asia/Pacific Wound Mgmt Products					

**SAMPLE
 TABLE**

"China will continue to experience rapid growth in health care spending over the long term as the population ages and government reforms improve the availability of basic and medical treatment. Through 2016, the country's total health expenditures will increase over 13 percent annually to \$610 billion, or about \$440 per capita. Beyond growth, outlays for medical products and services will be allocated more efficiently and effectively than in the past."
 --Section VI, pg. 201

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OTHER STUDIES

Elder Care Services

Revenues for the elder care services industry in the US will grow 5.2 percent per year through 2016 to \$319.5 billion. Skilled nursing facilities will remain the largest segment, while home health care services and assisted living facilities see the most rapid growth. Medicaid will remain the largest payment source, while Medicare leads gains. This study analyzes the \$249 billion US elder care service industry, with forecasts for 2016 and 2021 by type, provider, payment source and US region. The study also evaluates company market share and profiles industry players.

#2965December 2012 \$4900

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.

#2951October 2012 \$6200

Pet Health: Products & Services

US consumer spending on pet health products and services will reach \$30.9 billion in 2016, driven by the increasing treatment of companion animals as family members. Pet insurance will continue to see the fastest gains in the dominant service segment. Pharmaceuticals and parasiticides will remain the largest product segments. This study analyzes the \$24.6 billion US pet health industry, with forecasts for 2016 and 2021 by service, product, condition type and animal. The study also evaluates company market share and profiles industry players.

#2913July 2012..... \$5100

Disposable Medical Supplies

US disposable medical supplies demand will rise 4.3 percent yearly to \$46.7 billion in 2016. Syringes and inhalers, IV and urinary catheters, hemodialysis bloodlines, peritoneal dialysis kits, tissue sealants, biological wound dressings, Class IV garments and textiles, and blood glucose test strips will be among the fastest growing products. This study analyzes the \$37.8 billion US disposable medical supplies industry, with forecasts for 2016 and 2021 by product, market and material. The study also evaluates company market shares and profiles industry players.

#2853March 2012..... \$5100

Infection Prevention Products & Services

US demand for infection prevention products and services is forecast to rise 4.9 percent annually through 2015. Safety-enhanced medical devices and medical waste disposal supplies will be the fastest growing products, while protective apparel and textiles remain the largest segment. The services sector will be led by medical waste disposal and contract sterilization. This study analyzes the \$16.7 billion US infection prevention industry, with forecasts for 2015 and 2020 by type and market. The study also evaluates company market share and profiles industry players.

#2783September 2011..... \$4900

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