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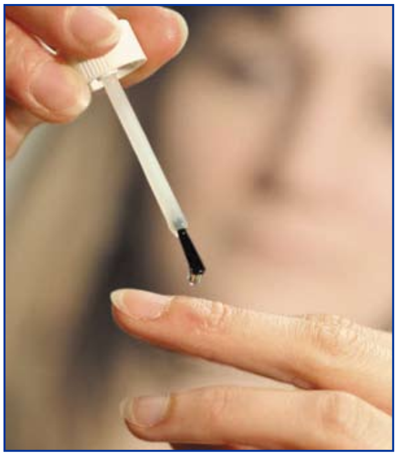

World Wound Management Products

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

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

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World Wound Management Products

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

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World Wound Management Products

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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 treatment, 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.

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

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. Nonetheless, 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.

Sample Text, Table & Chart

ASIA/PACIFIC

China: Wound Management Product Demand

Total demand for wound management products in China
ed to increase alm ... llion in 2
improving availa ... ealth ca
will underlie gro ... surgical
tient consultation ... ernized
capabilities in su ... ent. Hos
nate the delivery ... serving
of operations for ... integra
of outpatient facilities and physicians' offices. As a result, re
usually go to the hospital to receive outpatient consultations
sional health care treatments.

SAMPLE TEXT

Due to persisting imbalances in the distribution of healt
resources, China's per capita consumption of wound manage
ucts will remain slightly below developing world norms thro
Moreover, demand will remain concentrated in commodity b
sumables, supplies, and devices as only a small percentage o
have access to advanced procedures such as open heart surge
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-ass
treatment equipment, will remain negligible, at least in the n

Small to medium sized domestic producers of commod
closures, bandages, wound dressings, and wound healing age
nate the supply of wound management products in China. M
suppliers with manufacturing sites in the country including E
Melsungen, which operates a plant in Suzhou; Derma Scienc

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TABLE VI-3

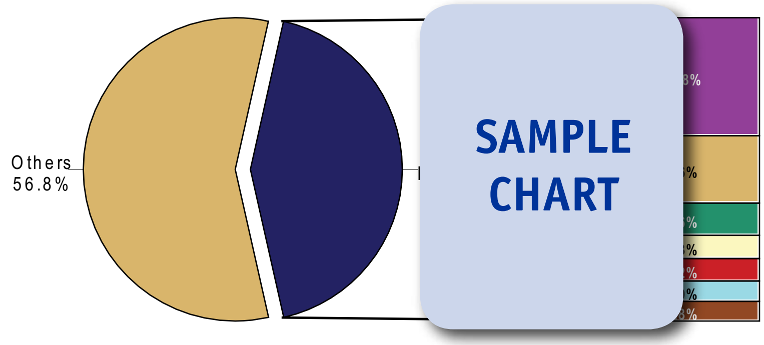
CHINA: WOUND MANAGEMENT INDICATORS

Item	2001	2006	2011	2016	2021
Population (million)					
% 50 years & older					
Population 50 Years & Older (million)					
50 to 64 Years					
65 Years & Older					
per capita GDP					
Gross Domestic Product (bil 2010$)					
$ health expenditures/capita					
Health Expenditures (bil $)					
hospital admissions/000 capita					
Hospital Admissions (000)					
surgical procedures/000 capita					
Surgical Procedures (000)					
outpatient consultations/capita					
Outpatient Consultations (million)					

SAMPLE TABLE

CHART VIII-1

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



World Wound Management Products

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Sample Profile, Table & Forecast

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

COMPANY PROFILES

AccessClosure Incorporated
645 Clyde Avenue
Mountain View, CA 94043
650-903-1000
http://www.acc

Annual Revenu
Employment:

Key Products:

SAMPLE PROFILE

AccessCl ... sed 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.

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"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.

#2965 .... December 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.

#2951 .... October 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.

#2913 .... July 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.

#2853 .... March 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.

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

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