World Infection Prevention Products

Industry Study with Forecasts for 2017 & 2022

Study #2997 | April 2013 | $6100 | 443 pages

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World demand to rise 6.4% annually through 2017

World demand for infection prevention products is forecast to increase 6.4 percent annually to $130 billion in 2017. The upgrading and enforcement of patient and staff safety standards in health care facilities, coupled with an expanding volume of hospital, surgical, and outpatient procedures, will promote overall gains. China, the United States, India, Russia, Japan, Germany, France, Italy, Brazil, and the United Kingdom will comprise the 10 largest national markets, combining to account for nearly two-thirds of global demand in 2017.

Growth in developing areas to exceed world average

Demand for infection prevention products in the United States, Western Europe, Japan, and virtually all other developed countries will expand at a below average pace through 2017 and beyond as their medical delivery systems are well established, meet the health care needs of most residents, and have already adopted stringent patient and medical staff safety standards. By contrast, growth in China, India, Brazil, and many other emerging economies will exceed the world average as their health care sectors are expanded, modernized, and adapted to formal infection prevention protocols. Product demand in China and India will increase at an annual pace of about nine percent through 2017, greatly exceeding the 5.0 percent yearly pace of the US.

Protective apparel, textiles among best opportunities

Protective apparel and textiles will remain the top selling group of infection prevention products worldwide. Expanded efforts by hospitals and outpatient facilities to reduce the threat of health care-associated infections (HAIs) in operating rooms will promote the increasing use of high value-added, barrier enhanced surgical drapes, gowns, face masks, and other apparel. Safety enhanced medical devices will also fare well in the global marketplace as health care facilities seek improved safety in blood collection, catheterization, drug delivery, and surgical procedures. This product group serves two critical areas of infection prevention: the reduction of HAIs and the prevention of accidental needlesticks.

The battle against HAIs, coupled with more patient procedures, will also impact favorably on overall global demand for disinfectant consumables and equipment and for medical gloves. Both of these product groups are utilized widely by health care and life science facilities for infection prevention and will benefit from the stricter enforcement of established standards related to staff and patient protection and facility cleaning. Trends promoting the use of premium formulations will create strong growth opportunities for personal, surface, surgical, and instrument disinfectants.
MARKETS

Japan: Infection Prevention Product Demand by Type

Demand for infection prevention products in Japan will increase at a 4.1% annual rate to over $6.2 billion in 2017, representing 12% of the Asia/Pacific region’s total. This growth reflects recent increase in the integration of new, high value-added supplies and devices, which improves the overall quality and cost-effectiveness of patient treatment. Stringent cost controls imposed on publicly funded health care services will moderate faster growth in demand.

Based on the advanced nature of the medical delivery system and favorable access of most residents to high quality health care, Japan forms the third largest national market for infection prevention products in the Asia/Pacific region. Virtually all types of infection prevention products will continue to sustain sizable sales levels in Japan. However, a decline in the number of residents 50 to 64 years will slow growth in the overall volume of surgical procedures and the incidence of acute and chronic conditions requiring professional treatment. In spite of these trends, Japan will remain one of the largest and most diverse markets served by the world infection prevention product industry. The country’s per capita demand for industry products will remain near the developed world average through 2017 and beyond.

In addition to the health care sector, infection prevention products will post sizable demand in Japan’s research oriented life science sector. This sector features one of the largest and most advanced pharmaceutical industries in the world. About 850 companies produce ethical, over-the-counter, and alternative medicines that extend into all therapeutic classes, delivery modalities, and dosage forms. The country is the leading global developer of proprietary anti-infective and anti-cancer agents and a force in the discovery and commercialization of proprietary cardiovascular and central nervous system agents. In addition, the Japanese pharmaceutical industry makes a full line of generic and over-the-counter medicines.

TABLE VI-10

JAPAN: INFECTION PREVENTION PRODUCT DEMAND BY TYPE
(million dollars)

<table>
<thead>
<tr>
<th>Item</th>
<th>2002</th>
<th>2007</th>
<th>2012</th>
<th>2017</th>
<th>2022</th>
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<td>5090</td>
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<td>Protective Apparel &amp; Textiles:</td>
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<tr>
<td>Surgical Drapes</td>
<td>952</td>
<td>1190</td>
<td>1470</td>
<td>1810</td>
<td>2200</td>
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<td>225</td>
<td>287</td>
<td>365</td>
<td>460</td>
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<td>Safety Enhanced Medical Devices:</td>
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<td>1150</td>
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<td>1860</td>
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<td>714</td>
<td>865</td>
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</tr>
</tbody>
</table>

CHART VIII-1

WORLD INFECTION PREVENTION PRODUCT MARKET SHARE
($95.4 billion, 2012)
Sample Profile, Table & Forecast

COMPANY PROFILES

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

Annual Sales: $150 million (estimated)
Employment: 850 (estimated)
Key Products: hand sanitizers and surgical scrubs

GOJO is a producer 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 is involved in the world infection control industry via the production of hand sanitizers and surgical scrubs used in acute care, long-term care, alternative care, and other health care facilities. GOJO’s hand sanitizers are sold under the PURELL brand name. These alcohol based formulations are engineered to kill 99.99 percent of the most common disease causing pathogens in as little as 15 seconds. PURELL sanitizers are compatible with latex, nitrile, and vinyl medical gloves.

Among the PURELL hand sanitizers are types featuring the Company’s 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.

"Global demand for surgical gowns will increase 7.1 percent annually to $7.5 billion in 2017. Disposable garments will account for more than 60 percent of this amount based primarily on convenience. However, reusable surgical gowns will continue to post substantial worldwide sales due to an increasing volume of minimally invasive surgical procedures, advances in microfiber fabrics, and overall cost saving advantages."

--Section III, pg. 66
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