



World Infection Prevention Products

Industry Study with Forecasts for **2017 & 2022**

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

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INDUSTRY STRUCTURE

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The upgrading and enforcement of patient and staff safety standards in health care facilities, coupled with more hospital, surgical, and outpatient procedures, will promote overall gains.

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.

World Infection Prevention Product Demand, 2017 (\$130 billion)



Protective Apparel & Textiles	32%
Safety Enhanced Devices	28%
Disinfectants	14%
Sterilization Products	13%
Other Types	13%

photo courtesy of corporate press office

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.

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Sample Text,
 Table & Chart

MARKETS

Japan: Infection Prevention Product Demand by Type

Demand for infection prevention products in Japan will increase by 2.3 percent annually to over \$1.5 billion by 2022, up from \$1.4 billion in 2012. The Asia/Pacific region's tight budgets for medical supplies and devices, which have reduced the effectiveness of patient treatment, have imposed on publicly funded health care systems a growth in demand.

**SAMPLE
 TEXT**

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 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 serving 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 major 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

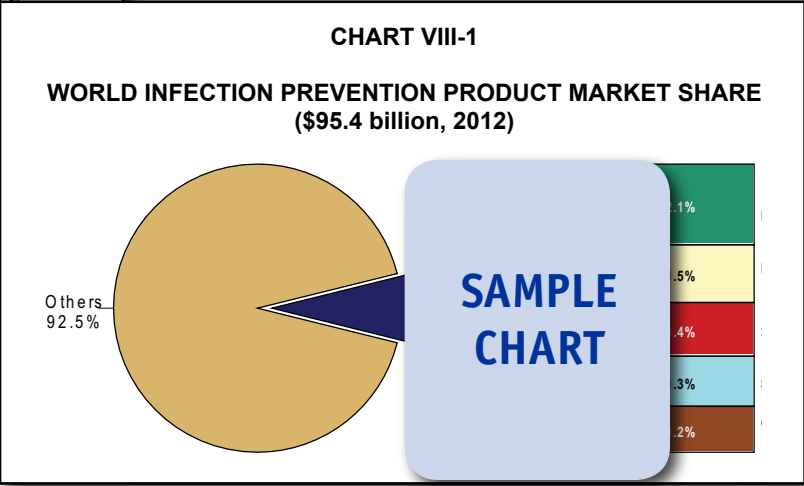
264

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TABLE VI-10
JAPAN: INFECTION PREVENTION PRODUCT DEMAND BY TYPE
 (million dollars)

Item	2002	2007	2012	2017	2022
Infection Prevent Product Demand	1,400	1,450	1,500	1,550	1,600
Protective Apparel & Textiles:					
Surgical Drapes					
Surgical Gowns					
Surgical & Staff Face Masks					
Other Apparel & Textiles					
Safety Enhanced Medical Devices:					
Catheters					
Syringes					
Blood Collection Tubes					
Surgical Instruments					
Other Devices					
Disinfectant Products:					
Surface Disinfectants					
Surgical Disinfectants					
Instrument Disinfectants					
Hand Sanitizers					
Disinfecting Equipment					
Sterilization Products:					
Sterile Containers					
Sterilization Wrap					
Sterilization Equipment					
Sterilization Indicators					
Medical Gloves:					
Examination & Laboratory Gloves					
Surgical Gloves					
Infectious Waste Disposal Products:					
Infectious Waste Disposal Supplies					
Infectious Waste Disposal Equip					

**SAMPLE
 TABLE**

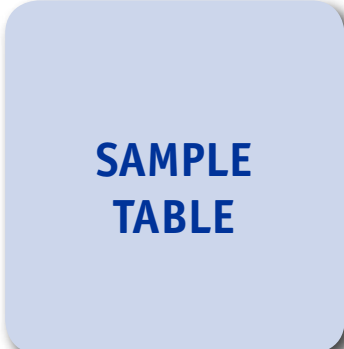


**SAMPLE
 CHART**

Sample Profile, Table & Forecast

TABLE III-6
WORLD SURGICAL GOWN DEMAND BY REGION
 (million dollars)

Item	2002	2007	2012	2017	2022
World Surgical Gown Demand					
North America:					
United States					
Canada & Mexico					
Western Europe					
Asia/Pacific:					
China					
Japan					
Other Asia/Pacific					
Central & South America					
Eastern Europe					
Africa/Mideast					



COMPANY PROFILES

GOJO Industries Incorporated

1 GOJO Plaza, Suite 500
 Akron, OH 44311
 330-255-
 http://w

Annual S
 Employ

Key Pro



GO is a manufacturer 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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OTHER STUDIES

Home Medical Equipment

US demand for home medical equipment will increase 8.2 percent annually to \$12.6 billion in 2018, driven by technological advances and cost containment efforts. Remote monitoring and real-time systems based on telemedicine technology will be the fastest growing type. Home therapeutic equipment will remain the largest segment, with growth led by dialysis machinery. This study analyzes the \$8.5 billion US home medical equipment industry, with forecasts for 2018 and 2023 by product. The study also evaluates company market share and profiles industry players.

#3141 March 2014..... \$5100

Disposable Medical Supplies

US demand for disposable medical supplies is forecasts to expand 4.1 percent annually to \$49.3 billion in 2018. Drug delivery and related products will remain the fastest growing and largest single category. Among other supplies, safety enhanced devices and infection resistant nonwovens will see the most rapid growth. This study analyzes the \$40.3 billion US disposable medical supplies industry, with forecasts for 2018 and 2023 by raw material, product and market. The study also evaluates company market share and profiles industry players.

#3111 February 2014..... \$5300

Disinfectant & Antimicrobial Chemicals

Demand for disinfectant and antimicrobial chemicals in the US is forecast to rise 6.1 percent annually to \$1.6 billion in 2017. Organosulfur compounds will see significant growth as antimicrobial agents in products such as water-based architectural paint, floor coverings, home textiles, and other construction materials. This study analyzes the \$1.2 billion US disinfectant and antimicrobial chemical industry, with forecasts for 2017 and 2022 by market, function, and product. The study also evaluates company market share and profiles industry players.

#3043 June 2013 \$4900

World Home Medical Equipment

World demand for home medical equipment will rise 7.0 percent yearly to \$28 billion in 2016. The US will remain the largest market while Brazil, China, India, and Russia will be among the fastest growing. Portable oxygen concentrators, remote patient monitors and home dialysis machines will offer some of the best opportunities. This study analyzes the \$20 billion world home medical equipment 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 players.

#2964 January 2013 \$6300

World Industrial & Institutional Cleaning Chemicals

World demand for industrial and institutional (I&I) cleaning chemicals will rise 4.7 percent yearly to \$44.4 billion in 2016. North America and Western Europe will remain dominant but developing regions will grow faster. Disinfectants and sanitizers will benefit from use in fast growing health care and food processing markets. This study analyzes the \$35.3 billion world I&I cleaning chemical industry, with forecasts for 2016 and 2021 by product, market, world region and for 18 countries. The study also evaluates company market share and profiles industry participants.

#2945 October 2012 \$6100

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