Disposable Medical Supplies

US Industry Study with Forecasts for 2018 & 2023

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Table of Contents

EXEcUTIVE SUMMARy

MARKET ENVIRONMENT
General .................................................. 4
Economic Factors .................................... 5
Demographic Patterns ............................... 9
Trends in Health Care ......................... 12
Health Insurance & the Affordable Care Act . 13
Medical Conditions ..................... 16
Acute Conditions .......................... 16
Chronic Conditions .................. 17
National Health Expenditures ........ 20
Spending Categories .......... 21
Funding Sources ..................... 25
Medical Providers .................... 27
Hospitals .............................. 28
Outpatient Facilities ............ 29
Physicians & Physicians' Offices . 32
Skilled Nursing Facilities .... 33
Dentists & Dental Offices .... 34
Other Medical Providers .... 35
Patient Activity .................... 36
Hospitai Activity ................ 37
Outpatient Visits ................. 38
Surgical Procedures ........ 39
Diagnostic Tests .................. 40
Medical Product Markets ...... 42
Pharmaceuticals .................. 43
Medical Supplies & Devices .... 44
Surgical Appliances & Supplies .... 44
Surgical & Medical Instruments ... 44
Biomedical Equipment .... 45
Diagnostic Products ........ 45
Ophthalmic Goods .......... 45
Dental Equipment & Supplies .... 46

RAw MATERIALS
General ................................................. 47
Plastic Resins ........................ 49
Polyvinyl Chloride ........... 51
Polypyrrole ..................... 53
Low Density Polyethylene . 54
Thermoplastic Elastomers ... 55
Acrylic ............................ 57
Polycarbonate ................ 57
ABS ............................... 58
High Density Polyethylene . 58
Thermoplastic Polysters ... 59
Polyurethane .............. 60
Other Plastic Resins .... 60
Nonwoven Fabrics .......... 61
Paper & Paperboard .... 63
Rubber Materials .... 65
Other Raw Materials ....... 66

PRODUCT OVERVIEW
General ............................................. 68
Disposable Medical Supplies Product Groups ... 69
Historical Market Trends ..................... 71
Regulatory Considerations ............... 72
New Product Approval Requirements .... 73
Health Care-Associated Infection Safeguards . 73
Supply & Device Reprocessing Standards .. 74
Occupational Safety & Health ............................. 76
US Trade ........................................... 77
International Markets ......................... 79

DRUG DELIVERY & RELATED PRODuctS
General .............................................. 82
Infusion Products .................... 85
IV Administration Sets ........ 86
Premixed IV Solutions .... 89
IV Catheters ..................... 91
Other Infusion Products .... 93
Enteral Feeding Supplies .... 94
IV Accessories ................ 95
Hypodermic Products .......... 96
Prefillable Syringes .......... 97
Injectors ...................... 98
Cartridges ...................... 100
Clinical Hypodermic Syringes .... 102
Clinical Hypodermic Needles . 104
Infusion Products ........... 106
Prefillable Inhalers .......... 108
Metered Dose Inhalers .... 109
Dry Powder Inhalers .... 112
Anesthesia Disposables .... 115
Disposable Oxygen Therapy Supplies .... 115
Anesthesia Disposables .... 117
Disposable Nebulizers & Accessories ... 118
Disposable Humidifiers .... 120
Other Disposable Inhalation Products .... 121
Disposable Dialysis Products .... 122
Disposable Hemodialysis Products .... 124
Disposable Peritoneal Dialysis Products .... 127
Transdermal Patches .... 129

DISPOSABLE WOUND MANAGEMENT PRODuctS
General ............................................. 133
Wound Closures .............. 136
Sutures ......................... 138
Absorbable Sutures .... 140
Nonabsorbable Sutures .... 141
Surgical Staples & Disposable .......................... 142
Stapling Devices ........ 142
Tissue Sealants ............ 145
Cyanacrylate Sealants .... 146
Fibrin Sealants ............ 147
Other Tissue Sealants .... 148
Other Wound Closures ..... 149
Anti-Adhesion Products ... 150
Hemostats .................... 151
Ligation Clips .............. 152
Disposable Bandages .... 153
Adhesive Bandages .... 154
Adhesive Tapes ........ 158

Cast Bandages & Accessories .......... 160
Gauze Bandages ................ 162
Pads & Compresses ........ 164
Other Disposable Bandages .... 165
Wound Dressings ................ 167
Biological & Synthetic Wound Dressings ... 168
Film Dressings ................ 169
Hydrocolloid Dressings .... 170
Collagen Dressings .... 171
Foam Dressings ........ 172
Hydrogel Dressings .... 173
Alginate Dressings .... 174
Other Biological & Synthetic Wound Dressings ... 175
Nonadherent Wound Dressings .... 177
Gauze Wound Dressings ........ 178
Other Nonadherent Wound Dressings ........ 179
Other Disposable Wound Management Products ................ 180
Management Products .......... 180
First Aid Kits ........... 181
Medical Sponges ........... 182
Medical Cotton Goods .... 184

NONWoven MEDICAL DISPOSABLES
General ............................................. 185
Disposable Nonwoven Medical Garments & Textiles .................. 187
Disposable Nonwoven Gowns .... 189
Disposable Nonwoven Surgical Gowns .... 190
Disposable Nonwoven Patient Gowns .... 193
Disposable Nonwoven Surgical Drapes .... 195
Disposable Nonwoven Face Masks .... 198
Other Disposable Nonwoven Medical Garments & Textiles .... 200
Disposable Nonwoven Staff Apparel .... 201
Disposable Nonwoven Towels & Bedding .... 202
All Other Disposable Nonwoven Garments & Textiles .... 203
Disposable Incontinence Products ........ 204
Disposable Incontinence Adult Undergarments .... 205
Disposable Incontinence Adult Shields .... 208
Disposable Incontinence Underpads .... 209
Furniture Protection Products .... 211

OTHER DISPOSABLE MEDICAL SUPPLIES
General ............................................. 212
Infection Prevention Supplies ........ 214
Sterilization Supplies .... 215
Sterile Containers ........ 216
Sterilization Wrap .... 226
Sterilization Indicators .... 228
Disposable Medical Gloves ........ 232
Examination Gloves .... 233
Surgical Gloves ........ 235

(continued on following page)
Table of Contents

(continued from previous page)

Disposable Waste Disposal Supplies .................................. 239
Disposable Waste Disposal Containers ............................. 240
Disposable Waste Disposal Accessories ............................ 242
Diagnostic & Laboratory Disposables ................................. 243
Disposable Diabetes Testing Supplies ................................. 244
Blood Glucose Test Strips ............................................... 245
Other Diabetes Testing Supplies ....................................... 247
Disposable Blood Collection Supplies .................................. 248
Disposable Labware ....................................................... 250
Disposable Diagnostic Catheters ........................................ 251
Angiography Catheters ................................................... 252
Other Disposable Diagnostic Catheters ............................... 254
Other Diagnostic & Laboratory Disposables ......................... 255
Home Test Kits ............................................................ 255
Disposable Physicians’ Examination Supplies ...................... 257
Disposable Temperature Measuring Products ....................... 258
Disposable Electroodes ................................................... 260
Surgical Disposables ...................................................... 261
Disposable Procedural Kits & Trays ..................................... 262
Cardiovascular Surgery ................................................... 263
Orthopedic Surgery ....................................................... 265
Chest Drainage Units ...................................................... 266
Other Procedural Kits & Trays .......................................... 267
Disposable Surgical Catheters ............................................ 268
Angioplasty Catheters ..................................................... 268
Other Disposable Surgical Catheters .................................... 270
Disposable Surgical Instruments ........................................ 273
Disposable Plastic Surgical Drapes ...................................... 275
All Other Disposable Medical Supplies ................................. 276
Disposable Patient Room Supplies ...................................... 277
Disposable Urinary Supplies .............................................. 279
Foley Catheters ............................................................. 281
Other Disposable Urinary Catheters ..................................... 282
Urinary Drainage Accessories .......................................... 282
Disposable Ostomy Supplies .............................................. 283
Disposable Enema Supplies .............................................. 286

MARKETS

General ........................................................................... 290
Hospital Market .............................................................. 292
Consumer & Home Health Care Markets .............................. 294
Outpatient Markets ........................................................ 296
Ambulatory Surgery Centers ............................................. 297
Urgent Care Centers ...................................................... 298
General Medical Clinics .................................................. 299
Other Outpatient Facilities .............................................. 299
Physicians’ Office Market ............................................... 300
Nursing Home Market .................................................... 302
Dental Office Market ...................................................... 304
Other Markets .............................................................. 305

INDUSTRY STRUCTURE

General308
Market Share .................................................................. 312
Competitive Strategies .................................................... 319
Mergers & Acquisitions ................................................... 320

Licensing & Related Agreements ......................................... 323
Research & Development ................................................ 325
Marketing & Distribution ................................................ 327
Manufacturing .................................................................. 328

COMPANY PROFILES

Abbott Laboratories .......................................................... 330
Alhilstrom Corporation ...................................................... 332
Ansell Limited ................................................................. 334
Bard (CR) Incorporated ..................................................... 337
Baxter International ......................................................... 342
Becton, Dickinson, and Company ...................................... 344
Boston Scientific ............................................................. 348
Braun (B.) Melsungen ....................................................... 351
Cardinal Health ............................................................... 354
Convatec Incorporated ..................................................... 357
Covidien plc ................................................................. 360
GlaxoSmithKline plc ....................................................... 366
Hospira Incorporated ....................................................... 368
Johnson & Johnson ........................................................ 370
Kimberly-Clark Corporation .............................................. 376
Medline Industries .......................................................... 380
Medtronic Incorporated .................................................... 383
Novartis AG ................................................................. 386
Smith & Nephew ............................................................. 388
Smiths Group ................................................................. 391
STERIS Corporation ....................................................... 394
Svenska Cellulosa ........................................................... 396
Teleflex Incorporated ....................................................... 397
Terumo Corporation ....................................................... 403
3M Company ................................................................. 407
Additional Companies in the Disposable Medical Supplies Industry ........................................ 411-416

List of Tables

EXECUTIVE SUMMARY

1 Summary Table ............................................................. 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators ............................................... 9
2 Population by Age Group ................................................. 12
3 Health Insurance Coverage of the US Population ............. 15
4 Acute Conditions by Type .............................................. 17
5 Chronic Conditions by Type .......................................... 20
6 National Health Expenditures by Spending Category ....... 24
7 National Health Expenditures by Funding Source .......... 27
8 Number of Hospitals & Hospital Beds by Type ............. 29
9 Number of Outpatient Facilities by Type ....................... 31
10 Number of Physicians/Physicians’ Offices .................... 33
11 Number of Skilled Nursing Facilities & Skilled Nursing Facility Beds ................................ 34
12 Number of Dentists & Dental Offices ............................ 35
13 Number of Other Medical Providers by Type ............... 36
14 Hospital Activity .......................................................... 38
15 Number of Outpatient Visits by Provider ...................... 39
16 Number of Surgical Procedures by Site ....................... 40
17 Number of Diagnostic Tests by Type ......................... 41
18 Medical Product Demand by Product Category ............. 42

RAW MATERIALS

1 Disposable Medical Supplies Raw Materials Demand by Type ........................................ 48
2 Plastic Resins Demand in Disposable Medical Supplies by Type .................................... 51
3 Nonwoven Fabrics Demand in Disposable Medical Supplies ........................................ 63
4 Paper & Paperboard Demand in Disposable Medical Supplies ........................................ 64
5 Rubber Materials Demand in Disposable Medical Supplies ............................................ 66
6 Other Raw Materials Demand in Disposable Medical Supplies ....................................... 67

PRODUCT OVERVIEW

1 Disposable Medical Supplies Demand by Product Group .............................................. 70
2 Historical Disposable Medical Supplies Demand, 2003-2013 ........................................... 72
3 US Trade in Disposable Medical Supplies .......................................................... 78
4 World Disposable Medical Supplies Demand by Region ............................................... 81

DRUG DELIVERY & RELATED PRODUCTS

1 Disposable Drug Delivery & Related Products Demand by Product Group ..................... 84
2 Disposable Infusion Products Demand by Product Group .............................................. 86
3 IV Administration Sets Demand by Type .................................................. 89
4 Premixed IV Solutions Demand by Product 91
5 IV Catheters Demand by Type ............................................. 93
6 Other Disposable Infusion Products Demand by Type ................................................. 94
7 Disposable Hypodermic Products Demand by Type ................................................... 96
8 Prefillable Syringes Demand by Product Group ......................................................... 98
9 Clinical Hypodermic Syringes Demand by Type ....................................................... 104
10 Separately Sold Clinical Hypodermic Needle Demand ................................................ 106
11 Disposable Inhalation Products Demand by Product Group .................................... 107
12 Prefillable Inhalers Demand by Type ........................................ 109
13 Disposable Oxygen Therapy Supplies Demand ......................................................... 116
14 Anesthesia Disposable Demand by Type .................................................. 118
15 Disposable Nebulizers & Accessories Demand ......................................................... 120
16 Disposable Humidifiers Demand .................................................. 121

(continued on following page)
List of Tables
(continued from previous page)

17 Other Disposable Inhalation Products Demand .................. 122
18 Disposable Dialysis Products Demand by Product Group .......... 124
19 Disposable Hemodialysis Products Demand by Type ............ 126
20 Disposable Peritoneal Dialysis Products Demand by Type ....... 129
21 Transdermal Patches Demand .................. 132

DISPOSABLE WOUND MANAGEMENT PRODUCTS
1 Disposable Wound Management Products Demand by Product Group ... 135
2 Wound Closures Demand by Product Group .................. 138
3 Sutures Demand by Type .................. 140
4 Surgical Staples & Disposable Stapling Devices Demand by Type ...... 145
5 Tissue Sealants & Adhesives Demand .................. 146
6 Other Wound Closures Demand ............. 150
7 Disposable Bandages Demand by Product Group .................. 154
8 Adhesive Bandages Demand .................. 158
9 Adhesive Tape Demand .................. 160
10 Cast Bandages & Accessories Demand .................. 162
11 Gauze Bandages Demand .................. 164
12 Pads & Compresses Demand .................. 165
13 Other Disposable Bandages Demand .................. 167
14 Wound Dressings Demand by Product Group .................. 168
15 Biological & Synthetic Wound Dressings Demand by Type ......... 169
16 Nonadherent Wound Dressings Demand by Type ............. 178
17 Other Disposable Wound Management Products Demand by Product Group . 181

NONWOVEN MEDICAL DISPOSABLES
1 Nonwoven Medical Disposables Demand by Product Group .................. 187
2 Disposable Nonwoven Medical Garments & Textiles Demand by Product Group .. 188
3 Disposable Nonwoven Gowns Demand by Product Group .................. 190
4 Disposable Nonwoven Surgical Gowns Demand .................. 193
5 Disposable Nonwoven Patient Gowns Demand .................. 194
6 Disposable Nonwoven Surgical Drapes Demand by Application .......... 198
7 Disposable Nonwoven Face Masks Demand by Type .................. 200
8 Other Disposable Nonwoven Medical Garments & Textiles Demand by Type . 201
9 Disposable Incontinence Products Demand by Product Group .................. 205

OTHER DISPOSABLE MEDICAL SUPPLIES
1 Other Disposable Medical Supplies Demand by Product Group .......... 213
2 Infection Prevention Supplies Demand by Product Group .......... 215
3 Sterilization Supplies Demand by Product Group .......... 216
4 Sterile Containers Demand by Type .................. 217
5 Sterilization Wrap Demand by Type .................. 228
6 Sterilization Indicators Demand by Type .................. 230
7 Disposable Medical Gloves Demand by Product Group .......... 233
8 Disposable Examination Gloves Demand .................. 235
9 Disposable Surgical Gloves Demand .................. 238
10 Disposable Waste Disposal Supplies Demand by Product Group .......... 240
11 Diagnostic & Laboratory Disposables Demand by Product Group .......... 244
12 Disposable Diabetes Testing Supplies Demand by Product Group .......... 245
13 Disposable Blood Collection Supplies Demand .................. 249
14 Disposable Labware Demand .................. 251
15 Disposable Diagnostic Catheters Demand by Type .................. 252
16 Other Diagnostic & Laboratory Disposables Demand by Product Group .......... 255
17 Surgical Disposables Demand by Product Group .................. 262
18 Disposable Procedural Kits & Trays Demand by Type .................. 263
19 Disposable Surgical Catheters Demand by Type .................. 268
20 Disposable Surgical Instruments Demand by Type .................. 275
21 Disposable Plastic Surgical Drapes Demand .................. 276
22 All Other Disposable Medical Supplies Demand by Product Group .......... 277
23 Disposable Patient Room Supply Demand .................. 279
24 Disposable Urinary Supplies Demand by Type .................. 281
25 Disposable Ostomy Supplies Demand by Type .................. 286
26 Disposable Enema Supplies Demand .................. 289

MARKETS
1 Disposable Medical Supplies Demand by Market .................. 291
2 Hospital Demand for Disposable Medical Supplies ............. 294
3 Consumer & Home Health Care Markets Demand for Disposable Medical Supplies ............. 296
4 Outpatient Facilities Demand for Disposable Medical Supplies ............. 297
5 Physicians’ Office Demand for Disposable Medical Supplies ............. 301
6 Nursing Home Demand for Disposable Medical Supplies ............. 303
7 Dental Office Demand for Disposable Medical Supplies ............. 305
8 Disposable Medical Supplies Demand in Other Markets ............. 307

INDUSTRY STRUCTURE
1 US Disposable Medical Supplies Sales by Company, 2013 .......... 309
2 Selected Acquisitions & Divestitures .......... 322
3 Selected Cooperative Agreements .......... 324

List of Charts

MARKET ENVIRONMENT
1 National Health Expenditures by Spending Category, 2013 .......... 25

RAW MATERIALS
1 Raw Materials Demand in Disposable Medical Supplies by Type, 2013 .......... 49

PRODUCT OVERVIEW
1 Disposable Medical Supplies Demand by Product Group, 2013 .......... 71

DRUG DELIVERY & RELATED PRODUCTS
1 Disposable Drug Delivery & Related Products Demand by Product Group, 2013 .......... 85

DISPOSABLE WOUND MANAGEMENT PRODUCTS
1 Disposable Wound Management Products Demand by Product Group, 2013 .......... 136

NONWOVEN MEDICAL DISPOSABLES
1 Disposable Nonwoven Medical Garments & Textiles Demand by Product Group, 2013 .......... 189

OTHER DISPOSABLE MEDICAL SUPPLIES
1 Other Disposable Medical Supplies Demand by Product Group, 2013 .......... 214

MARKETS
1 Disposable Medical Supplies Demand by Market, 2013 .......... 292

INDUSTRY STRUCTURE
1 Disposable Medical Supplies US Market Share, 2013 .......... 314
Gains will be driven by an increasing volume of patient activity attributable to an aging population, a rising incidence of medical conditions, and the extension of health insurance coverage.

US demand to rise 4.1% annually through 2018

US demand for disposable medical supplies will expand 4.1 percent annually to $49.3 billion in 2018. An increasing volume of patient activity attributable to an aging population, a rising incidence of medical conditions, and the extension of health insurance coverage by the Affordable Care Act of 2010 will comprise the major factors spurring growth. The US disposable medical supplies market will also benefit from a heightened focus on infection prevention throughout the health care sector. Pressures from the Centers for Disease Control and Prevention (CDC), the Joint Commission on the Accreditation of Healthcare Organizations (JCAHO), and other medical organizations will prompt hospitals, outpatient facilities, and other health care establishments to follow protocols and standards aimed at keeping patients and staff safe from exposure to dangerous, potentially life-threatening pathogens during medical procedures.

Drug delivery products to be fastest growing type

Based on an increasing number of patients who need surgery or long-term chronic care therapy, drug delivery and related products will remain the fastest expanding group of disposable medical supplies. Total demand registered by this product group will rise 5.1 percent annually to $13.4 billion in 2018. Safety-enhanced devices for the minimally invasive delivery of parenteral medicines, inhalation therapies, and IV and dialysis solutions will lead growth.

Disposable wound management products will post demand of $11.2 billion in 2018, up 3.8 percent annually from 2013. Polymeric tissue sealants, along with alginate, foam, and collagen wound dressings, will realize the fastest growth based on enhanced safety and faster 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 other disposable wound management products, benefiting from trends promoting self-treatment. Advances in less invasive surgery and tissue sealants will weaken the overall US market for traditional suture and staple wound closures.

Compared to disposable medical supplies as a whole, nonwoven medical disposables will see above average growth in demand. The heightened focus on infection prevention in the health care sector will boost consumption of single use, high value-added nonwoven garments and textiles by hospitals and outpatient facilities. A rising prevalence of incontinence problems attributable to the aging population will impact favorably on retail and institutional sales of nonwoven adult undergarments, shields, and other protective products.
Drug Delivery & Related Products

Disposable Peritoneal Dialysis Products

Demand for peritoneal dialysis disposables will increase annually to $890 million by 2018. Advances in related equipment systems will make self-treatment easier for ESRD patients who receive needed peritoneal dialysis procedures. In 2013, 59,000 US patients performed the procedure on a daily basis, up from 42,400 patients in 2013. This growth will boost demand for peritoneal dialysis disposables, especially kits adaptable to automated machines. The large market for these disposables reflects the number of patient treatment requirements, which range from once daily for continuous cycling peritoneal dialysis to up to four times per day for continuous ambulatory peritoneal dialysis.

Three major techniques are available for peritoneal dialysis: continuous ambulatory peritoneal dialysis (CAPD), continuous cyclic peritoneal dialysis (CCPD), and intermittent peritoneal dialysis (IPD). All three employ specially formulated dialysate solutions that flow through a catheter connected to the peritoneum, a thin tissue lining that covers the abdomen cavity. The dialysate absorbs the body’s waste products and drains back through the catheter into its original bag. CAPD, previously the most widely employed peritoneal dialysis procedure, involves a manual flow and drainage process. The patient is able to carry out normal daily activities. During this period, the patient is able to carry out normal daily activities.

CCPD encompasses a drainage and flow process similar to that involved in CAPD. However, the process is performed by an automated machine known as a cycler while the patient sleeps. The machine implements a number of cycles, each lasting about an hour, during which dialysate is added to and removed from the peritoneum. Based on convenience advantages, CCPD is generating fast growth in the number of patients following the procedure.

Sterile Containers Demand (mil units)

<table>
<thead>
<tr>
<th>Item</th>
<th>2003</th>
<th>2008</th>
<th>2013</th>
<th>2018</th>
<th>2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surgical Procedures (mil)</td>
<td>68.5</td>
<td>75.3</td>
<td>81.5</td>
<td>87.3</td>
<td>93.0</td>
</tr>
<tr>
<td>sterile containers/procedure</td>
<td>86</td>
<td>93</td>
<td>100</td>
<td>107</td>
<td>115</td>
</tr>
<tr>
<td>Sterile Containers Demand (mil units)</td>
<td>5870</td>
<td>6990</td>
<td>8130</td>
<td>9350</td>
<td>10650</td>
</tr>
<tr>
<td>cents/unit</td>
<td>18.9</td>
<td>19.9</td>
<td>21.2</td>
<td>22.6</td>
<td>24.2</td>
</tr>
<tr>
<td>Sterile Containers Demand</td>
<td>1110</td>
<td>1390</td>
<td>1720</td>
<td>2110</td>
<td>2580</td>
</tr>
<tr>
<td>Trays</td>
<td>419</td>
<td>538</td>
<td>677</td>
<td>850</td>
<td>1060</td>
</tr>
<tr>
<td>Pouches</td>
<td>390</td>
<td>462</td>
<td>544</td>
<td>635</td>
<td>740</td>
</tr>
<tr>
<td>Bags</td>
<td>126</td>
<td>153</td>
<td>183</td>
<td>215</td>
<td>250</td>
</tr>
<tr>
<td>Other</td>
<td>175</td>
<td>237</td>
<td>316</td>
<td>410</td>
<td>530</td>
</tr>
<tr>
<td>% sterile containers</td>
<td>71.2</td>
<td>71.3</td>
<td>70.8</td>
<td>70.6</td>
<td>70.7</td>
</tr>
<tr>
<td>Sterilization Supplies Demand</td>
<td>1560</td>
<td>1950</td>
<td>2430</td>
<td>2990</td>
<td>3650</td>
</tr>
</tbody>
</table>

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STERIS Corporation
5960 Heisley Road
Mentor, OH 44060
440-354-2600
http://www.steris.com

Revenues: $1.5 billion (FY 2013)
US Revenues: $1.1 billion (FY 2013)
Employment: 6,000 (FY 2013)

Key Products/Services: biological and chemical indicators and medical waste disposal products

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 3 segments: Healthcare, Life Sciences, and STERIS Isomedix Services.

STERIS participates in the US disposable medical supplies industry via the Healthcare segment, which generated revenues of $1.1 billion in FY 2013. Through this segment, the Company produces and markets equipment, accessories, consumables, and services for hospitals, surgery centers, and other health care providers. Disposable and consumable items manufactured by the Healthcare segment comprise biological and chemical indicators, as well as waste disposal products.

Biological and chemical indicators from STERIS, designed for use with specific sterilization systems and procedures, are intended to test antibacterial effectiveness. Biological indicators are offered under the VERIFY and SPORDEX brand names, and feature bacterial spores that will survive if sterilization procedures are not adequate. The Company’s chemical indicators comprise VERIFY and DART monitoring strips.

### TABLE VI-7

<table>
<thead>
<tr>
<th>DISPOSABLE BANDAGES DEMAND BY PRODUCT GROUP (million dollars)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>Resident Population (million) $ disposable bandages/capita</td>
</tr>
<tr>
<td>Disposable Bandages Demand</td>
</tr>
<tr>
<td>Adhesive Bandages</td>
</tr>
<tr>
<td>Adhesive Tapes</td>
</tr>
<tr>
<td>Cast Bandages &amp; Accessories</td>
</tr>
<tr>
<td>Gauze Bandages</td>
</tr>
<tr>
<td>Pads &amp; Compresses</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>% disposable bandages</td>
</tr>
<tr>
<td>Disposable Wound Management Products</td>
</tr>
</tbody>
</table>

This Freedonia study, *Disposable Medical Supplies*, offers historical data (2003, 2008 and 2013) plus forecasts for 2018 and 2023 for demand by product, raw material and market. The study also details key market environment factors, examines the industry structure, evaluates company market share data and profiles 25 competitors active in the US industry.
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Title __________________________

Company ________________________

Division _________________________

Street __________________________

(No PO Box please)

City/State/Zip ___________________

Country ________________________

Phone __________________________ Fax _______________________

Email __________________________

Signature _______________________

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The undersigned hereby represents that the above captioned study will be used by only __ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia’s standard fee schedule then in effect. Note: Entire company corporate use license, add $2600; one additional user, add $600; two additional users, add $1200; three additional users, add $1800.

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Page 7
About The Freedonia Group

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