US demand to rise 5.1% annually through 2019

US demand for medical and dental adhesives and sealants is expected to grow 5.1 percent annually to $2.1 billion in 2019. Expansion of the market will be fostered by rising health expenditures and rising focus on improving medical and dental procedure outcomes. Advances in life expectancy and the rapid growth in population segments aged 55 and above will lead to increasing incidences of acute illness, a greater prevalence of chronic diseases and disorders, and an increasing volume of patient activity that will drive demand for adhesives and sealants. Technical advancements in biotechnology further allow for sealants that act in conjunction with standard wound closures to reduce fluid and air leaks during and after surgery. This reduces recovery time and readmission rates, which have become key healthcare issues.

Acrylic polymers to remain most widely used types

Acrylic polymers will remain the most widely used medical and dental adhesives, representing almost 30 percent of demand in 2019. Acrylic will retain its status as the leading polymer for dental and orthopedic applications due to its relative low cost, durability, and formulation versatility. Acrylic sealants play a major role in the federal government’s agenda to promote oral health, aligning with a stated objective to increase the percentage of children and adolescents receiving dental sealants on their permanent molars. After acrylic, the most prevalent adhesives and sealants are based on polymers loaded with high levels of natural fillers such as glass and cellulose, which are widely used in dental adhesives and bone cements. Medical adhesives based on cyanoacrylate will continue to penetrate both internal and external medical applications based on the commercialization of new grades with improved biocompatibility and flexibility.

Pulmonary applications to be fastest growing medical uses

Cardiovascular and bone applications are expected to lead demand in the medical segment through 2019, accounting for more than 50 percent of all use. However, adhesive and sealant demand in pulmonary applications is forecast to grow at the fastest rate of all medical and dental applications. This growth will be driven by the recent regulatory approval of a product specifically for use in lung surgery as well as the continued adoption of protein-based hemostats in pulmonary surgery. While the incidence of lung cancer is falling, chronic obstructive lung disease (COPD) remains the third leading cause of death in the US, behind cancer and heart disease. Looking forward, European hospitals are conducting clinical trials of nonsurgical procedures based on the use of lung sealants to treat lung hyperinflation caused by COPD; this will likely lead to the adoption of similar procedures in the United States.

Restorative applications to fare well

Among dental applications, denture bonding agents, pit and fissure sealants, and restorative adhesives will continue to account for over 80 percent of demand through 2019. The most rapid growth is expected for restorative dental applications, with rapid gains also in smaller segments such as tissue bonding applications associated with periodontal care. However, total demand growth in dental applications will lag medical through 2019, limited by market maturity in pit and fissure sealants and in dental bonding agents.

Study coverage

This upcoming Freedonia industry study, Medical & Dental Adhesives & Sealants, is priced at $5200. It presents historical demand data (2004, 2009 and 2014) plus forecasts (2019 and 2024) by product, application and market. The study details key market environment factors, analyzes company market share and profiles 25 US industry players.
Introduction

EXECUTIVE SUMMARY

1 Summary Table

MARKET ENVIRONMENT

General
Economic Factors
Demographic Trends
Healthcare Trends
Health Insurance Reforms
Health Expenditures
Spending Categories
Funding Sources
Medical Providers
Hospitals
Outpatient Facilities
Physicians & Physicians’ Offices
Skilled Nursing Homes
Dentists & Dental Offices

Patient Activity
Hospital Activity
Surgical Procedures
Outpatient Episodes
Dental Procedures

Regulatory Trends
Competitive Products Overview
Historical Market Trends
Pricing Trends
Foreign Trade

World Medical & Dental Adhesives & Sealants Demand
LIST OF TABLES & CHARTS:

1 Total Demand (by Market, 2014)

APPLICATIONS

General
Internal Medical
Cardiovascular
Bone
Demand by Product
Demand by Procedure
Cranial
Pulmonary
Abdominal
Other Internal

External Medical
Tissue Bonding
Prosthesis Attachment
Other External

Dental
Denture Bonding Agents
Pit & Fissure Sealants
Restorative Adhesives
Orthodontic Bonding Agents
Luting Cements
Tray Adhesives
Dental Surgical Tissue Bonding

LIST OF TABLES & CHARTS:

1 Medical & Dental Adhesives & Sealants Demand by Product
2 Medical & Dental Adhesives & Sealants Demand by Procedure
3 Medical & Dental Adhesives & Sealants Demand by Category
4 Medical & Dental Adhesives & Sealants Demand by Market
5 Medical & Dental Adhesives & Sealants Demand by Procedure

PRODUCTS

General
Synthetic
Acrylic
Cyanocrylate

Types
Producers & Products
Silicone
Polyethylene Glycol
Other Synthetic Adhesives & Sealants

Plasma & Protein-Based

LIST OF TABLES & CHARTS:

1 Medical Adhesives & Sealants Demand by Product
2 Synthetic Polymer Medical Adhesives & Sealants Demand by Product
3 Acrylic Medical Adhesives & Sealants Demand
4 Cyanocrylate Medical Adhesives & Sealants Demand
5 Silicone Medical Adhesives Demand
6 Polyethylene Glycol Medical Adhesives
7 Other Synthetic Polymer Medical Adhesives & Sealants Demand
8 Natural Medical Adhesives & Sealants Demand by Product
9 Plasma & Protein-Based Medical Adhesives & Sealants Demand
10 Collagen Medical Adhesives Demand
11 Fibrin Medical Adhesives Demand
12 Albumin Medical Adhesives Demand

LIST OF TABLES & CHARTS:

1 Medical Adhesives & Sealants Demand by Product
2 Synthetic Polymer Medical Adhesives & Sealants Demand by Product
3 Acrylic Medical Adhesives & Sealants Demand
4 Cyanocrylate Medical Adhesives & Sealants Demand
5 Silicone Medical Adhesives Demand
6 Polyethylene Glycol Medical Adhesives
7 Other Synthetic Polymer Medical Adhesives & Sealants Demand
8 Natural Medical Adhesives & Sealants Demand by Product
9 Plasma & Protein-Based Medical Adhesives & Sealants Demand
10 Collagen Medical Adhesives Demand
11 Fibrin Medical Adhesives Demand
12 Albumin Medical Adhesives Demand
13 Other Natural Medical & Dental Adhesives & Sealants Demand

MARKETS

General
Primary Care
Dental Offices
Consumer

LIST OF TABLES & CHARTS:

1 Medical & Dental Adhesives & Sealants Demand by Market
2 Medical & Dental Adhesives & Sealants Demand by Procedure

INDUSTRY STRUCTURE

General
Manufacture
Sale
Use
Market Share
Competitive Strategies
Acquisitions & Divestitures
Licensing & Related Cooperative Agreements
Marketing & Distribution

Raw Materials & Manufacturing

LIST OF TABLES & CHARTS:

1 US Medical Adhesives & Sealants Sales by Company, 2014
2 US Medical Adhesives & Sealants Market Share, 2014
3 Selected Acquisitions & Divestitures
4 Selected Cooperative Agreements

Company Profiles
This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

**APPENDIX**

**COMPANY PROFILES**

Profiles of 25 US industry competitors such as Baxter International, Johnson & Johnson, Pfizer, Procter & Gamble, DENTSPLY International & Stryker

**Freedonia’s methods involve:**

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature
- Accessing internal proprietary databases
Order Information
To order fill out the coupon below and mail to The Freedonia Group, or place your order by phone toll free (800) 927-5900 (US) or (440) 684-9600, or by fax (440) 646-0484, or by email at info@freedoniagroup.com

Free Handling & Shipping
There is NO charge for handling and UPS shipping in the US. Expect delivery in 3 to 5 days. Outside the US, Freedonia provides free airmail service. If you require express delivery, Freedonia provides this to you at cost.

Save Fifteen Percent
If you order three (3) different titles at the same time, you can receive a discount of 15%. If your order is accompanied by a check, you may take a 5% cash discount (discounts do not apply to corporate use licenses).

Credit Card Orders
You may charge your order to either American Express, MasterCard or Visa. Please include your credit card account number, expiration date and your signature.

Orders Outside of the US
Checks must be paid in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfer instructions please contact our customer service department at info@freedoniagroup.com. Or you may use a credit card.

Corporate Use License
Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2,600 you receive unlimited use of an electronic version (PDF) of the study, Place it on your Intranet, e-mail it to coworkers around the world, or print it as many times as you like! Order it today.

Online Access
The complete text and tables from our studies and reports can be purchased at our website www.freedoniagroup.com and through major commercial online hosts.

Other Titles from The Freedonia Group

World Adhesives & Sealants
Global demand for adhesives and sealants is forecast to rise 4.5 percent per year through 2019 to 20.2 million metric tons, valued at $64 billion. Packaging will remain the leading outlet, while construction will capture increased share. Reactive adhesives and sealants will be the fastest growing products. This study analyzes the 16.1 million metric ton world adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market for six world regions and 18 major countries. The study also evaluates company market share and profiles industry players.

Dental Products & Materials
US demand for dental products and materials will rise 3.4 percent yearly to $12.7 billion in 2019. Cosmetic and repair/restorative products will be the fastest growing professional products. Among consumer products, value-added formulations will drive the dominant toothpaste segment. Polymers, ceramics and minerals will lead gains in dental materials. This study analyzes the $10.7 billion US dental product and material industry, with forecasts for 2019 and 2024 by product and raw material. The study also evaluates company market share and profiles industry competitors.

Waxes
US demand for waxes will rise 1.8 percent annually through 2019 to three billion pounds, with value demand reaching $3.2 billion. Petroleum and mineral waxes will remain the dominant types, while synthetic waxes will grow the fastest. The leading industrial market will provide the best opportunities, particularly in the production of coatings and inks, adhesives, and building boards. This study analyzes the $2.4 billion US wax industry, with forecasts for 2019 and 2024 by type and market. The study also evaluates company market share and profiles industry players.

Adhesives & Sealants
US demand for adhesives and sealants is forecast to increase 2.8 percent per year to 6.4 billion pounds in 2019, valued at $12.8 billion. Reactive adhesives and sealants will be the fastest growing types. The construction market will lead gains, while the manufacturing and assembly market will remain the largest segment. This study analyzes the 5.6 billion pound US adhesives and sealants industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry players.

Dental Products & Materials
US demand for dental products and materials will rise 3.4 percent yearly to $12.7 billion in 2019. Cosmetic and repair/restorative products will be the fastest growing professional products. Among consumer products, value-added formulations will drive the dominant toothpaste segment. Polymers, ceramics and minerals will lead gains in dental materials. This study analyzes the $10.7 billion US dental product and material industry, with forecasts for 2019 and 2024 by product and raw material. The study also evaluates company market share and profiles industry competitors.

Biocompatible Materials
US demand for biocompatible materials is forecast to increase 4.9 percent annually to $5.6 billion in 2018. Ceramic materials will grow the fastest based on improved nanotechnology compounds for orthopedic implants, spinal fixation devices and dental products. Natural polymers will be the second fastest growing segment, paced by hyaluronic acid. This study analyzes the $4.4 billion US biocompatible materials industry, with forecasts for 2018 and 2023 by product and application. The study also evaluates company market share and profiles industry players.

ORDER FORM

Name: ______________________________________
Title: ______________________________________
Company: _____________________________________
Division: ______________________________________
Street: ________________________________________
(no PO Box please)
City/State/Zip: ________________________________
Country: ______________________________________
Phone: __________________ Fax: __________________
email: _________________________________________

F-WEB-339

Need analysis on a topic not covered by Freedonia Industry Studies? Call Customer Service for details on Freedonia Custom Research

TITLE | PRICE
--- | ---
Medical & Dental Adhesives & Sealants | $5200

- Corporate Use License (add to study price) + $2600
- Additional Print Copies @ $600 each

Total (including selected options): $__________

- Enclosed is a check (5% discount) drawn on a US bank and payable to The Freedonia Group, in US funds (CT, MA, MD, NY, OH residents add appropriate sales tax)
- Bill my company [ ] American Express [ ] MasterCard [ ] Visa

Credit Card # _____________________________ Expires mm/yy [ ] Security Code

Signature: ________________________________

The Freedonia Group 767 Beta Drive Cleveland, OH 44143-2326 USA website: www.freedoniagroup.com phone: 800-927-5900 (US) or 440-684-9600 fax: 440-646-0484 email: info@freedoniagroup.com