INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

# Infection Prevention Products & Services

## Industry Study with Forecasts for 2020 & 2025

**Study #3403 | April 2016 | $5400**

The US market for infection prevention products and services encompasses protective apparel and textiles, safety-enhanced medical devices, sterilization supplies, disinfectants, and waste disposal containers and accessories. Although declining, the overall rate of healthcare-associated infections (HAIs) in hospitals is significantly above the target set by the Centers for Disease Control and Prevention. Increasing pressure on hospitals to improve results will boost revenues generated by infection prevention supplies, equipment and services. Additionally, the market will benefit from the upgrading of quality standards in life science research and pharmaceutical and medical device production facilities.

### Protective apparel & textiles largest share of products

Protective apparel and textiles will account for the largest share of infection prevention supplies as stepped-up efforts by hospitals to reduce the risk of HAIs in surgery and other invasive procedures broaden the use of premium, barrier-enhanced gloves, drapes, gowns, face masks, etc. Safety-enhanced medical devices will post the fastest growth in demand among infection prevention supplies as medical providers seek to improve the safety of blood collection, catheterization, drug delivery, and invasive surgical procedures. Safety-enhanced medical devices help reduce HAIs and prevent accidental needlesticks.

### Extensive use of disinfectants continues

Efforts to reduce the incidence of HAIs, coupled with upward trends in the volume of patient procedures and life science activities, will boost the US market for disinfectants. These consumables, which are utilized widely in both healthcare and life science establishments, will benefit from the stricter enforcement of standards for staff and patient protection and facility and instrument cleaning. Trends promoting the use of premium formulations will underlie overall growth in disinfectant demand. The enforcement of infection prevention safeguards will also impact favorably on the market for infectious waste disposal supplies.

### Waste disposal & sterilization services to drive revenue

Convenience, cost, and regulatory compliance advantages are predicted to expand infection prevention service revenues through 2020. Infectious waste disposal services will dominate demand as government restrictions on onsite incineration remain and prompt health facilities to use outside firms for infectious waste collection and disposal. Contract sterilization services serve a more limited customer base and post a much lower revenue volume. Nonetheless, this segment is projected to grow measurably. To avoid the extensive capital investment required to set up and operate in-house sterilization systems, an increasing number of pharmaceutical and medical device producers will rely on outside contractors.

### Study coverage

This study analyzes the US market for infection prevention products and services. It offers historical data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for demand by product and service, as well as by market. The study also considers market environment factors, details the industry structure, evaluates company market share and profiles 29 US industry competitors.

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# TABLES & CHARTS

# Infection Prevention Products & Services

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## PRODUCTS & SERVICES

### Safety-Enhanced Medical Devices

Medical supply and device producers have responded to the widespread problem of healthcare-associated infections and accid needlesticks in hospitals and outpatient facilities by adapting safe improvements to selected products. These efforts have led to the i duction of safety-enhanced ca' refilled sy blood collection tubes, surgic sets. Ba increasing use in IV and drug inage, bl collection, and surgical proce ical devi are forecast to record demand ı 2020, u percent annually from 2020.

SAMPLE TEXT

The incorporation of safety-enhanced features into medical d can be achieved through special product designs or by the applica antimicrobial coatings. The market for safety-enhanced medical d evolved in response to two longstanding health care-related proble high incidence of urinary tract infections among hospital and amb tory patients with indwelling or intermittent drainage catheters, ar frequent occurrence of accidental needlesticks among medical per nel. More than 20 different blood-borne pathogens can be transm by needled devices such as IV catheters, hypodermic syringes, an collection sets after use. Among these pathogens are AIDS/HIV and hepatitis B and C.

Safety enhanced IV catheters are available in a number of models that vary in features and sophistication. The basic device consists of three-to-six-inch tubing enclosed in a narrow cylinder-shaped rigid wall. One end of the tubing connects to a small indwelling needle that is inserted through the skin. The opposite end has a small opening for the injection of parenteral drugs via syringe. After injections, drug res in the tubing are removed through flushing with heparin and for in



**TABLE V-3**

**HOSPITAL INFECTION PREVENTION DEMAND BY TYPE (million dollars)**

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|---|---|---|---|---|---|
| Number of Hospitals | | | | | |
| mil $ infection prevention/hospital | | | | | |
| Hospital Market Demand | | | | | |
| Infection Prevention Supplies: | | | | | |
| Apparel & Textiles | | | | | |
| Safety-Enhanced Devices | | | | | |
| Sterilization Supplies | | | | | |
| Disinfectants | | | | | |
| Medical Waste Disposal Products | | | | | |
| Infection Prevention Equipment | | | | | |
| Infection Prevention Services | | | | | |
| % hospitals | | | | | |
| Infection Prevention Healthcare Markets | | | | | |

SAMPLE TABLE

Source: The Freedonia Group

**TABLE IV-4**

**PROTECTIVE APPAREL & TEXTILES DEMAND BY PRODUCT GROUP (million dollars)**

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|---|---|---|---|---|---|
| Healthcare & Life Science Facilities (000) | | | | | |
| 000$ apparel & textiles/facility | | | | | |
| Protective Apparel & Textiles Demand | | | | | |
| Medical & Laboratory Gloves | | | | | |
| Surgical Drapes | | | | | |
| Surgical Gowns | | | | | |
| Patient Gowns | | | | | |
| Surgical & Staff Face Masks | | | | | |
| Other Protective Apparel & Textiles | | | | | |
| % protective apparel & textiles | | | | | |
| Infection Prevention Supplies Demand | | | | | |

SAMPLE TABLE

Source: The Freedonia Group

## 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

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## Related Studies

### Disposable Medical Supplies

US demand for disposable medical supplies will rise 4.2 percent annually to $54.1 billion in 2020. Drug delivery products will remain the largest and fastest growing type, led by safety-enhanced devices for minimally invasive delivery of parenteral and inhalation medicines, and IV solutions. Home healthcare will remain the fastest growing market. This study analyzes the $44.1 billion US disposable medical supply industry, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry players.

*#3378............. February 2016 ............... $5500*

### Drug Delivery Products

Demand for drug delivery products in the US will rise 6.1 percent yearly to $251 billion in 2019. Parenteral products will grow the fastest, driven by monoclonal antibodies and polymer-encapsulated medicines. Hormones and central nervous system agents will lead gains by application. Pen injectors and retractable prefillable syringes will pace devices. This study analyzes the $187 billion US drug delivery system industry, with forecasts for 2019 and 2024 by product and application. The study also evaluates company market share and profiles industry players.

*#3354............ December 2015 ............. $5300*

### 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.

*#3223............ December 2014 ............. $5200*

### World Medical Disposables

Global demand for medical disposables is forecast to rise 6.6 percent annually to $245 billion in 2018. The Asia/Pacific region will remain the largest and fastest growing market. Products used to treat widely prevalent chronic conditions such as kidney failure, urinary incontinence and arthritis-related pain will grow the fastest. This study analyzes the $178 billion world disposable medical supply industry, with forecasts for 2018 and 2023 by product, world region, and for 16 countries. The study also evaluates company market share and profiles industry competitors.

*#3205............September 2014............. $6400*

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## Freedonia's methods

- 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

## About The Freedonia Group

The Freedonia Group is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States and other world markets. Industries analyzed by Freedonia include:

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