

Disposable Medical Supplies

Study # 1965
August 2005
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US demand to grow 5.6% yearly through 2009

US demand for disposable medical supplies will increase 5.6 percent annually to \$71 billion in 2009. Gains will be driven by an expanding number of treated patients, by heightened concerns about nosocomial and related infections throughout the medical community, and by the upgrading of infection prevention safeguards in hospitals and other health care facilities. Home health care will form the fastest expanding market for disposable medical supplies as consumers broaden self-treatment and preventive medicine activities, and medical providers increase the range of services available to home patients. Nonetheless, hospitals will remain the largest and most diverse market based on the complexity and product-intensive nature of inpatient procedures and strong need for safeguards against infection.

IV, catheterization segment to stay largest, lead gains

IV, catheterization and related products will remain the largest and fastest growing

US Disposable Medical Supplies Demand by Product, 2004 (\$54.1 billion)



disposable medical supply product group, with demand increasing 6.5 percent annually to \$37 billion in 2009. Gains will reflect an expanding base of chronic care patients requiring surgery or continuous therapy that employs high value-added products such as prefilled inhalers; prefilled syringes; renal, angioplasty and atherectomy catheters; premixed parenteral nutritionals; transdermal patches; and oxygen delivery systems.

Prefilled staplers; bioengineered tissue adhesives and sealants; collagen, foam and alginate dressings; and growth factor healing agents will see the fastest

growth among disposable wound management supplies based on performance and infection prevention benefits in surgery and the treatment of injuries. Limited pricing flexibility and similarities among major brands will moderate gains in the market for most types of bandages, with advances in staples and bioengineered sealants inhibiting growth in the market for sutures.

Class IV surgical drapes and gowns will generate the best sales gains among nonwoven medical disposables as surgical infection prevention safeguards are upgraded by hospitals and ambulatory surgery centers. Disposable

face masks will also fare well in the marketplace, benefitting from routine use by medical providers in virtually all direct contact procedures.

Infection prevention advantages will boost demand for several other types of disposable medical supplies, including examination and surgical gloves; personal, surface and instrument disinfectants; and infectious waste disposal products. The increasing complexity of medical research investigation will impact favorably on the market for disposable labware. Growth opportunities for dental disposables will increase with aging population trends and rising numbers of procedures. New high value-added silicone hydrogel, aspheric and toric configurations will encourage broader sales of disposable contact lenses.

Study coverage

This new Freedonia industry study, *Disposable Medical Supplies*, is available for \$4300. It presents historical demand data (1994, 1999 and 2004) and forecasts through 2009 and 2014 by disposable medical supply material, product and market. The study also evaluates company market share and profiles 22 leading competitors.

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TABLE V-6
CARDIOVASCULAR CATHETER DEMAND
(million dollars)

Item	1994	1999	2004	2009	2014
Chronic Heart Conditions (million) \$ cardiovascular catheters/condition					
Cardiovascular Catheter Demand					
Angioplasty					
Angiography					
Atherectomy					
Other					
% cardiovascular Catheter Demand					

SAMPLE TABLE
Demand forecasts for each type of product provided in value (dollars)

TABLE VII-4
DISPOSABLE NONWOVEN SURGICAL DRAPE DEMAND
(million dollars)

Item	1994	1999	2004	2009	2014
Surgical Procedures (million) \$ drapes/procedure					
Nonwoven Disposable Surgical Drapes					
Cardiovascular Surgery					
Urological					
Abdominal					
Other					
% drapes					
NW Disp Med Garments & Textiles					

SAMPLE TABLE
Historical data (1994, 1999, 2004) plus forecasts to 2009 and 2014

WOUND MANAGEMENT SUPPLIES

Staples & Stapling Devices

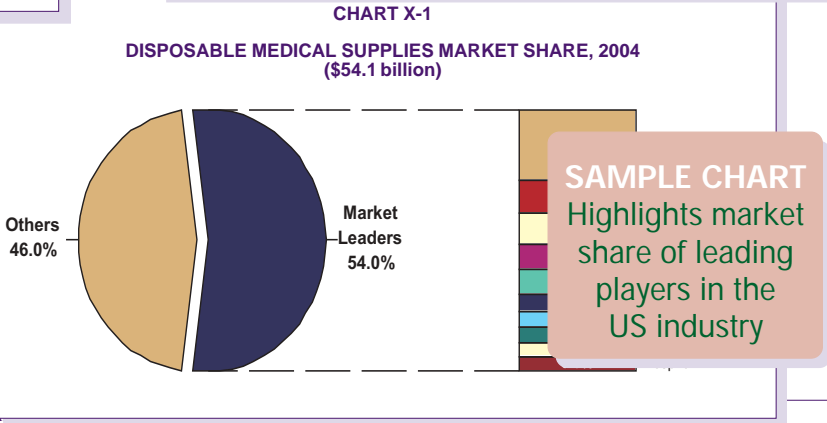
Demand for disposable stapling and stapling devices is expected to increase at a compound annual growth rate of 4.5 percent annually from 2004. The advantages in the closing of wounds and the emergency treatment of serious wounds will continue to account for the demand. Less favorably, advances in wound closure techniques, especially bioengineering, will reduce the demand for disposable staples.

Surgical staples are stainless steel devices used to close internal tissues, reconstruct or seal off organs, remove obstructions, occlude blood vessels and close skin incisions. As a result, these disposables offer the advantages of reduced blood loss, less trauma. Staples also speed up operative procedures as much more quickly. However, in closing rough and friable tissue, they usually fail to prevent air and fluid leakage that can lead to complications, especially in lung-related surgeries.

Although sold separately, most staple demand is derived from pre-loaded disposable applicators. These products operate in a similar fashion as office staplers with available models holding between 15 and 55 individual wound closures. Staples are produced in six different sizes in both absorbable and removable formats. Associated supplies used in stapling procedures include clips and hemostats (such as fibrin glue) for constricting blood vessels and controlling hemorrhaging.

Wholesale prices of disposable staplers range from \$12 to \$90 each depending upon capacity. The devices are normally packaged in three to six

SAMPLE PAGE



SAMPLE CHART
Highlights market share of leading players in the US industry

TABLE IX-1
DISPOSABLE MEDICAL SUPPLIES DEMAND BY MARKET
(million dollars)

Item	1994	1999	2004	2009	2014
Medical Facilities (000) \$000\$ disp med supplies/facility					
DMS Demand by Market					
Hospitals					
Home Health Care					
Outpatient Facilities					
Physicians' Offices					
Nursing Homes					
Dental Offices					
Other Markets					

SAMPLE TABLE
Examines factors influencing US market demand, plus forecasts for several key markets

COMPANY PROFILES

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

Revenues: \$1.1 billion (FY 2005)
Employment: 5,250 (FY 2005)

Key Products: sterile packaging, biological and chemical indicators, hand washes and soaps, surgical scrubs, disinfectants, and wipes

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 three segments: Healthcare, Life Sciences and STERIS.

STERIS participates in the US disposable medical supplies market through the Healthcare segment, which had FY 2005 revenues of \$1.1 billion. Of the segment's FY 2005 revenues, the Healthcare segment produces and markets sterile packaging, chemical indicators, detergents, hand washes and soaps, surgical scrubs, disinfectants, and wipes.

Sterile packaging products from the Company include biohazard bags, heat- and self-seal pouches, tubing, and indicator tapes, labels and strips. Biohazard bags are constructed from autoclavable polypropylene and designed to contain non-sharps and biohazardous waste. STERIS' heat- and self-seal pouches, which are made from various plastics or TYVEK materials produced by DuPont (Wilmington, Delaware), are marketed under the VIS-U-ALL II and EAGLEPAC brand names. VIS-U-ALL II

SAMPLE PROFILE

Profiles for 22 participants in the US industry

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World Pharmaceutical Packaging

Global pharmaceutical packaging demand will grow 6.7% annually through 2009. China, India and Brazil will generate the strongest gains while Western Europe, the US and Japan will remain dominant. Prefillable inhalers and syringes will grow the fastest while plastic bottles will sustain the largest share of demand. This study analyzes the \$22.3 billion world pharmaceutical packaging industry to 2009 and 2014 by material, product, world region and for 26 countries. Includes company profiles and market share.

#1996 11/2005 \$5500

Infection Prevention Products & Services

US infection prevention products and services demand will grow 4.6% yearly through 2009. Surgical drapes and gowns, hand sanitizers and powder-free gloves will be among the top performers. Services will outpace products overall, led by contract sterilization. The hospitals market will remain dominant while drug companies lead gains. This study analyzes the \$9.4 billion US infection prevention industry to 2009 and 2014 by type and market. It also evaluates market share and profiles major producers.

#1944 07/2005 \$4100

Medical & Dental Adhesives & Sealants

US demand for medical and dental adhesives and sealants will grow 8.4% annually through 2009 based in part on new product development and increasing acceptance of these materials in surgical and consumer settings. Best gains are expected for cyanoacrylate, polyethylene glycol and various plasma and protein types. This study analyzes the \$1 billion US medical and dental adhesive and sealant industry to 2009 and 2014 by type and market. It also evaluates company market share and profiles leading players.

#1922 04/2005 \$4100

Wipes

US consumer and industrial wipes demand will grow 6% yearly through 2009 based on further market segmentation and new product introduction. Baby wipes will remain the top segment while clean room and surface prep wipes grow the fastest. Manufacturing and health care will top out industrial markets. Spunlaced nonwovens will outpace airlaid substrates. This study analyzes the \$1.5 billion US wipes industry to 2009 and 2014 by market and material. It also evaluates market share and profiles major players.

#1909 03/2005 \$4100

Sterile Medical Packaging

US sterile medical packaging demand will grow 5.4% yearly through 2008. Stimulants include stricter infection controls and higher value packaging that also delivers drugs. Thermoformed trays and pouches will remain dominant while prefillable syringes lead gains. Medical supplies and devices will outpace the pharmaceuticals market. This study analyzes the \$1.6 billion US sterile medical packaging industry to 2008 and 2013 by market, product and material. It also evaluates market share and profiles major producers.

#1888 01/2005 \$4100

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