



# DISPOSABLE MEDICAL SUPPLIES MARKETS *(SAMPLE COPY, NOT FOR RESALE)*

Trends, Industry Participants, Product Overviews and Market Drivers

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## 1. Introduction

This report focuses on the U.S. and world disposable medical supplies markets. Product categories examined include surgical gowns, surgical drapes, isolation gowns, surgical and examination gloves, institutional incontinence disposables, operating room (OR) custom kits and trays, non-OR custom packs, shoe covers, masks, disposable coveralls and lab-coats, headwear, protective eyewear, sterile wipes, swabs and mops. For each market segment, this study presents the latest information on size, growth rates, sales projections and factors influencing growth in the U.S. and internationally.

Progress in medical science has by a long way enhanced the healthcare rescue system in the U.S. and the world over. One of the greatest achievements has been the reductions and control of hospital acquired contagions. To combat this problem, disposable medical supplies have done a good job. By using disposable medical supplies, the risk of obtaining a secondary ailment while receiving cure in a healthcare facility has become reduced radically.

Disposable medical products are the products designed for cheapness and short-term expediency somewhat medium to long-term durability, with most products only planned for single use. Safe and good medical instruments are the first choice of every doctor as well as medical products supplier. To enhance the protection and happiness of patients, every medical institution and private healthcare organizations need to be eternally vigilant in supplying proper medical equipments. Disposable, single use medical instruments such as containers or specula, reusable surgical instruments like surgical scissors, blades, tissue forceps, dilators and curettes medical instruments are extensively used in all medical facilities from various medical fields.

Among disposable wound management supplies, pre-filled staplers; bioengineered tissue adhesives and sealants; collagen, foam and alginate dressings; and growth factor healing agents will see the fastest growth. By contrast, limited pricing flexibility and similarities among major brands will moderate gains in the market for most types of bandages. Advances in staples and sealants will slow growth in overall demand for surgical sutures.

Surgical drapes and gowns will see the best sales gains among non-woven medical disposables as surgical infection prevention safeguards are upgraded by hospitals and ambulatory surgery centers in the U.S. and all the developing countries. Disposable face masks will also fare well in the marketplace, as will 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.

The ever-increasing medical activities and extensive infection prevention requirements, hospitals will remain the largest and most diverse market for disposable medical supplies, accounting for more than █% of 2011 demand. These facilities will continue to lead sales in most product segments. However, due to the impact of fixed reimbursement rates and group purchasing practices, hospitals in the U.S. will provide below-average growth opportunities for disposable medical supplies as a whole.

In the U.S., Canada and some of the European Union (E.U.) countries, home healthcare will continue to comprise the fastest growing market for disposable medical supplies. Demand will be boosted by the increasing availability of respiratory and other medication in high value-added delivery devices, the expansion of blood glucose monitoring activity among diabetic patients, widening third-party coverage for home therapy services, and the sustained popularity of short-term use contact lenses.

Outpatient facilities, nursing homes and physicians' offices will present below-average growth opportunities for disposable medical supplies due to cost containment trends and the commodity, price-sensitive nature of most items used. By contrast, demand in dental practices, paramedic organizations and other markets will advance at a faster than average pace, reflecting less intensive pricing pressures and needs for higher value-added supplies and devices.

## 1.1 Objectives

The main objectives of this study are to describe the structure of the disposable medical supply business, provide information on the current size and projected growth of the global market, identify market opportunities and focus on global industry developments. The report also examines the medical uses of disposable medical supplies, market drivers and trends in the industry.

## 1.2 Scope

This analysis concentrates on the disposable medical supplies market segment in important worldwide markets such as the U.S., Japan and Europe. It focuses primarily on the hospital market segment and describes the devices and supplies marketed by major companies in this segment. This review discusses the market size, growth rates and market components for a wide variety of disposable supplies and consumables used in this area. The report does not cover what is generally characterized as durable devices, instruments, reagents or imaging equipment. The study touches on specialty medical testing as part of the overall analytical focus on companies marketing health-related equipment. However, it is beyond the scope of this report to quantify the size of this broader market. The reader should consult other TriMark Publications reports at <http://www.trimarkpublications.com> for details on individual market segments related to special medical testing.

## 1.3 Methodology

The author of this report holds a Ph.D. in biochemistry from the University of Minnesota and has many decades of experience in science writing and as a medical industry analyst. He has been a senior director of several large regional and national healthcare laboratories. The editor holds a Ph.D. and is a retired college professor with vast experience in biochemistry, biotechnology, pharmacology and environmental biology.

Company-specific information is obtained mainly from industry trade publications, academic journals, news and research articles, press releases and corporate websites, as well as annual reports for publicly-held firms. Additionally, sources of information include the non-governmental organizations (NGOs) such as the World Health Organization (WHO) and governmental entities like the U.S. Department of Health and Human Services (HHS) and U.S. federal agencies such as the National Institutes of Health (NIH), the Food and Drug Administration (FDA) and the Centers for Disease Control and Prevention (CDC). Where possible and practicable, the most recent data available have been used.

Some of the statistical information was taken from Biotechnology Associates' databases and from TriMark's private data stores. The information in this study was obtained from sources that we believe to be reliable, but we do not guarantee the accuracy, adequacy or completeness of any information or omission or for the results obtained by the use of such information. Key information from the business literature was used as a basis to conduct dialogue with and obtain expert opinion from market professionals regarding commercial potential and market sizes. Senior managers from major company players were interviewed for part of the information in this report.

### *Primary Sources*

TriMark collects information from hundreds of Database Tables and many comprehensive multi-client research projects, as well as Sector Snapshots that we publish annually. We extract relevant data and analytics from TriMark's research as part of this data collection.

### *Secondary Sources*

TriMark uses research publications, journals, magazines, newspapers, newsletters, industry reports, investment research reports, trade and industry association reports, government-affiliated trade releases and other published information as part of its secondary research materials. The information is then analyzed and translated by the Industry Research Group into a TriMark study. The Editorial Group reviews the complete package with product and market forecasts, critical industry trends, threats and opportunities, competitive strategies and market share determinations.

### ***TriMark Publications Report, Research and Data Acquisition Structure***

The general sequence of research and analysis activity prior to the publication of every report in TriMark Publications includes the following items:

- Completing an extensive secondary research effort on an important market sector, including gathering all relevant information from corporate reporting, publicly-available data and proprietary databases.
- Formulating a study outline with the assigned writer, including important items, as follows:
  - Market and product segment grouping, and evaluating their relative significance.
  - Key competitors' evaluations, including their relative positions in the business and other relevant facts to prioritize diligence levels and assist in designing a primary research strategy.
  - End-user research to evaluate analytical significance in market estimation.
  - Supply chain research and analysis to identify any factors affecting the market.
  - New technology platforms and cutting-edge applications.
- Identifying the key technology and market trends that drive or affect these markets.
- Assessing the regional significance for each product and market segment for proper emphasis of further regional/national primary and secondary research.
- Completing a confirmatory primary research assessment of the report's findings with the assistance of expert panel partners from the industry being analyzed.

#### **1.4 Executive Summary**

Among disposable wound-management supplies, the fastest growth is likely to be seen in pre-filled staplers; bioengineered tissue adhesives and sealants; collagen, foam and alginate dressings; and growth factor healing agents. By contrast, limited pricing flexibility and similarities among major brands likely will moderate gains in the market for most types of bandages. Advances in staples and sealants are anticipated to slow growth in overall demand for surgical sutures.

Class IV surgical drapes and gowns probably will see the best sales gains among non-woven medical disposables as surgical infection prevention safeguards are upgraded by hospitals and ambulatory surgery centers. Disposable face masks also likely will fare well in the marketplace, as will examination and surgical gloves; personal, surface and instrument disinfectants; and infectious waste-disposal products. The increasing complexity of medical research investigation may have a favorable impact on the market for disposable labware. New high value-added silicone hydrogel as well as aspheric and toric configurations are expected to promote broader sales of daily and other short-wear disposable contact lenses.

The demand for nanotechnology healthcare products in the U.S. is projected to increase nearly █% per year to \$█ in █. Gains will be led by the introduction of new, improved cancer and central nervous system therapies based on solubilization technologies. Diagnostic tests based on nanoarrays and quantum dots, and imaging agents based on superparamagnetic iron oxide nanoparticles will also see strong growth. In spite of progress in introducing new products, the vast potential of nanotechnology in the healthcare field will not be fully realized for at least a decade as stringent regulatory barriers and technical complexities delay the commercialization of targeted drug delivery systems, tissue regenerators and other breakthrough products. However, by █, demand for nanotechnology healthcare products is projected to exceed \$█.

The U.S. is the largest medical non-wovens market in the world and is projected to exceed \$█ by the year █. Europe is projected to experience high growth in medical non-wovens sector in the coming years. Asia-Pacific offers massive potential in the long run largely driven by some of the fastest growing global economies, including China and India. A large consumer base in these countries coupled with improving healthcare system and safety

awareness bodes well for the medical non-wovens disposables market. Asia-Pacific is the fastest growing medical non-wovens market and is projected to register a compound annual growth rate (CAGR) of more than █%.

Data obtained from █ show that as of █, the ophthalmic sector as a whole was up █% over the last █ years. The contact lens industry remains healthy with both U.S. (█% to █%) and worldwide (█% to █%) growth predicted over the next year. The worldwide soft contact lens market is estimated at \$█ while the U.S. market is estimated at \$█. The worldwide gas permeable lens market contributes another \$█.

Medical and dental adhesives and sealants demand in the U.S. is forecast to rise █% per year to \$█ in █. Much of this growth is attributable to the aging U.S. population, since older individuals are more likely to require surgical and dental procedures than other age groups. Advances will also depend on continuing new-product development and increasing acceptance of these materials in surgical and consumer settings. Medical adhesives and sealants command relatively high prices due to their specialized nature and costly commercialization process (involving extensive research and clinical testing).

Blood glucose strips market in the U.S. is projected to reach \$█ by █. In Europe, with the assessment of quality care in everyday setting fast gaining importance in several countries, demand for blood glucose meters and strips is projected to grow at a significant rate. Germany and U.K. comprise the key markets accounting close to █% of the European market. Blood glucose meters market in Europe is expected to reach \$█ by █. Asia-Pacific is the fastest expanding market for blood glucose meters and strips, expected to grow at █%.

The worldwide market for examination gloves is expected to rise by \$█ between █ and █. Europe—a typically saturated market—is passing through a period of stringent rationalization of healthcare costs. The worldwide surgical gloves market is forecast to reach \$█ by █ driven by powder free surgical gloves, which is projected to expand at a CAGR of █%.

In █, the revenue for the U.S. urinary catheter market was \$█, with a CAGR of █%. Moreover, the European market for urinary catheters is around double that of its U.S. counterpart. The single largest driver of market demand for urinary catheters is the ever-increasing aging population that requires catheterization during hospitalization. It is anticipated that catheters which are easier to insert and which reduce infection rates would increase market demand and share.

According to █ wound care is a major healthcare market with an estimated value of \$█ in █ with projections to grow to \$█ by █. The global double-digit growth is being driven by several factors, including an aging population, the rise in the global incidence of diabetes and chronic vascular disorders, and a steady advancement in wound care technologies. The advanced wound care segment encompasses a wide range of disparate technologies that includes dressings and other devices. The three main categories for dressings are: traditional wound care such as gauze, moist wound dressings designed to manage basic moisture issues, and active dressings which incorporate technologies that provide additional benefits such as antimicrobial activity.