



# DISPOSABLE SYRINGE MARKETS

*(SAMPLE COPY, NOT FOR RESALE)*

Trends, Industry Participants, Product Overviews and Market Drivers

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## 1.0 Introduction

### 1.1 Statement of Report

The report examines the disposable syringe markets. It provides detailed forecasts for the traditional and safety-engineered sharps markets. It describes the major drivers and restraints, technology trends, and industry challenges for the disposable syringe market. It examines the markets for blood collection sets, hypodermic access syringes and needles, sharps-based insulin delivery devices, port access solutions, and other specialty syringes and needles, as well as the supplies utilized in clinics and by patients directly in their homes to diagnose and monitor disease and to administer medications.

This analysis is intended to provide basic market data pertaining to the U.S. and worldwide market segments. Each market segment is analyzed to determine size, growth rates, sales projections and factors influencing growth in the U.S. and internationally. Unit and dollar volume are used to indicate market sizes.

### 1.2 About This Report

The study specifically focuses on market dynamics, current market drivers and emerging trends within the disposable syringe markets. Additionally, this review examines industry challenges and potential threats to syringe and needle supplies manufacturers and makes strategic recommendations for boosting market share. The emphasis is on those companies actively developing and marketing products to hospitals, physicians and the general public for medically-related uses. We believe that some of the market segments have the potential for growth rates above 15% per year over the next five years. The reader should consult other TriMark reports for a detailed discussion of the important individual market segments that are related to syringes such as glucose testing, blood constituent analyses as used in hospital, point of care and doctor's office settings and diabetic markets at <http://www.trimarkpublications.com>.

### 1.3 Scope of the Report

The disposable syringe market segments are identified as:

- Total reusable needle and syringe market.
- Total disposable needle and syringe market.
- Pre-filled syringes.
- Safety syringes.
- Insulin injector pens.
- Needleless injectors.
- Vaccination injectors.
- Blood collection needles and syringes.
- Hypodermic needles and syringes market.
- Insulin needles and syringes market.
- Specialty needles and syringes market.
- Needleless injector market.

This analysis provides an overview of individual disposable syringe market segments, some of which possess the elements that will lead to high and sustained growth rates for the foreseeable future. Also presented is a description of the ancillary supplies marketed by major companies in each market segment. The study presents qualitative and quantitative data and information on key market measures and benchmarks such as:

- Market size by segment.
- Company market share.
- Product market share.
- Technology market share.
- Industry structure.
- Economic factors.

- Syringe design criteria.
- Product pricing.
- Emerging markets.
- Market projections.
- Strategic alliances.
- Proprietary technology.
- Technology factors.
- Market factors.
- Regulatory factors.

Technology areas include:

- **Blood Collection Syringes and Needles:** Winged and standard phlebotomy access devices.
- **Hypodermic Syringes and Needles:** Combination needle-syringe units and stand-alone needles and syringes.
- **Port Access Needles:** Integrated port-needle devices and stand-alone Huber needles.
- **Insulin Syringes and Needles:** Combination needle-syringe units and stand-alone needles and syringes.
- **Other Specialty Syringes and Needles:** Allergist, anesthesia, biopsy, dental, fistula, ophthalmic and tuberculin.

This report does not cover peripheral devices such as lancing devices for patients with diabetes. It does not discuss non-syringe devices such as breast examination kits, temperature-measuring devices, fertility control devices, condoms, gels or creams. Moreover, this review does not cover disposable plastic supplies for the healthcare market unless its specifically designed for use and sale in one of the designated market segments covered in this report.

A number of companies that market syringe products are primarily distributors of these products, rather than the primary developer. These companies, necessary and important to the medical products industry, are also covered here. Concentration is placed 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, separately, on a description of the devices and supplies marketed by major companies in this segment for home use.

#### 1.4 Objectives

The primary objectives of this report are to:

- Identify important market drivers through a comprehensive look at various sales segments for disposable syringes.
- Obtain a complete understanding of the structure of the disposable syringe business from its basic principles to its applications.
- Discover feasible market opportunities via an identification of high-growth applications in different medical areas, with a focus on the biggest and expanding markets.
- Focus on global industry developments through an in-depth analysis of the major world markets for disposable medical supplies, including forecasts for growth.
- Define the disposable syringe market including definitions, processes and trends.
- Assess the market drivers and bottlenecks, from the perspective of the medical and commercial communities.
- Discuss the potential benefits of disposable syringes for various sectors of the medical and commercial communities.
- Establish the current total market size and future growth of the disposable syringe market and analyze the current size and growth of individual segments.
- Provide current and forecasted market shares by company.
- Discuss profit and business opportunities by individual market segment.
- Provide strategic recommendations for near-term business opportunities.
- Assess current commercial uses of disposable syringes.

- Assess the disposable syringe business model.
- Analyze and evaluate safety syringe products and assess the market potential for existing and probable future products.
- Analyze product designs, technologies and market development issues.
- Provide detailed descriptions of safety syringe market segments, market demographics and business strategies.
- Chart product sales data, market share and forecasts to 2007.
- Profile safety syringe companies, its product development activities, business strategies and corporate alliances and affiliations.
- Assess the importance of pharma-device alliances and design partnerships on future safety syringe products.
- Evaluate the impact of economic, technology and regulatory factors on parenteral drug delivery markets.

The following questions are answered in this report:

- What are the near term business opportunities in disposable syringes?
- What are the current and forecasted sizes of the disposable syringe market?
- What are the business models currently used by companies in disposable syringe markets?
- What are the technologies used in disposable syringe supplies?
- Who holds the proprietary rights to disposable syringe technology?
- What are current applications of this technology?
- What regulatory processes must disposables undergo in the U.S., Japan and Europe?
- How will technology change in disposables affect treatment and payment paradigms?
- How will litigation concerns increase physician and hospital use of disposables?
- How will technology reduce adverse growth trends and decrease total patient care cost?
- How will new technology platforms for disposable medical supplies reduce healthcare expenditures?
- How will costs and time decrease with new disposable product use?
- What are the drivers and impediments to growth for each market segment covered?

## 1.5 Methodology

The information in this report is based upon interviews with sales and marketing professionals of companies in the disposable syringe markets. Other sources of information for the report are trade association publications and meetings, product brochures and catalogs and company literature. Where the companies under discussion are publicly held, an examination of the annual reports, 10K filings and financial reports are used as the basis of the data reported. Some of the information obtained for the report is taken from TriMark Publications' databases, Biotechnology Associates' files and from the private data stores of the author. The information set forth in this study was obtained from sources that are believed to be reliable, however, no guarantee of the accuracy, adequacy or completeness of any information, omission or for the results obtained by the use of such information is provided.

## 1.6 Executive Summary

The main product groups within the syringe and needle sector of this report include disposable and safety syringes, injection pens, needleless injectors, reusable syringes, insulin pumps and specialty needles. This market is substantially driven by a disparate collection of situations: disease areas such as diabetes, cancer, hepatitis and human immunodeficiency virus (HIV) infection, the field of immunization and the social condition of intravenous (IV) drug abuse. Each of these areas and its potential to influence demand for injection equipment is discussed. Detailed examination of the injection pen and needleless injector market segments is presented here, as well as a comment on reusable syringes. While the market for injection devices is largely driven by needlestick and other safety concerns, as well as by trends in such disease areas as diabetes and cancer, a number of key issues affecting the market for catheters are discussed in this report. They include such topics as day surgery, the reuse of single-use devices and *Communauté Européen* (CE) marketing.