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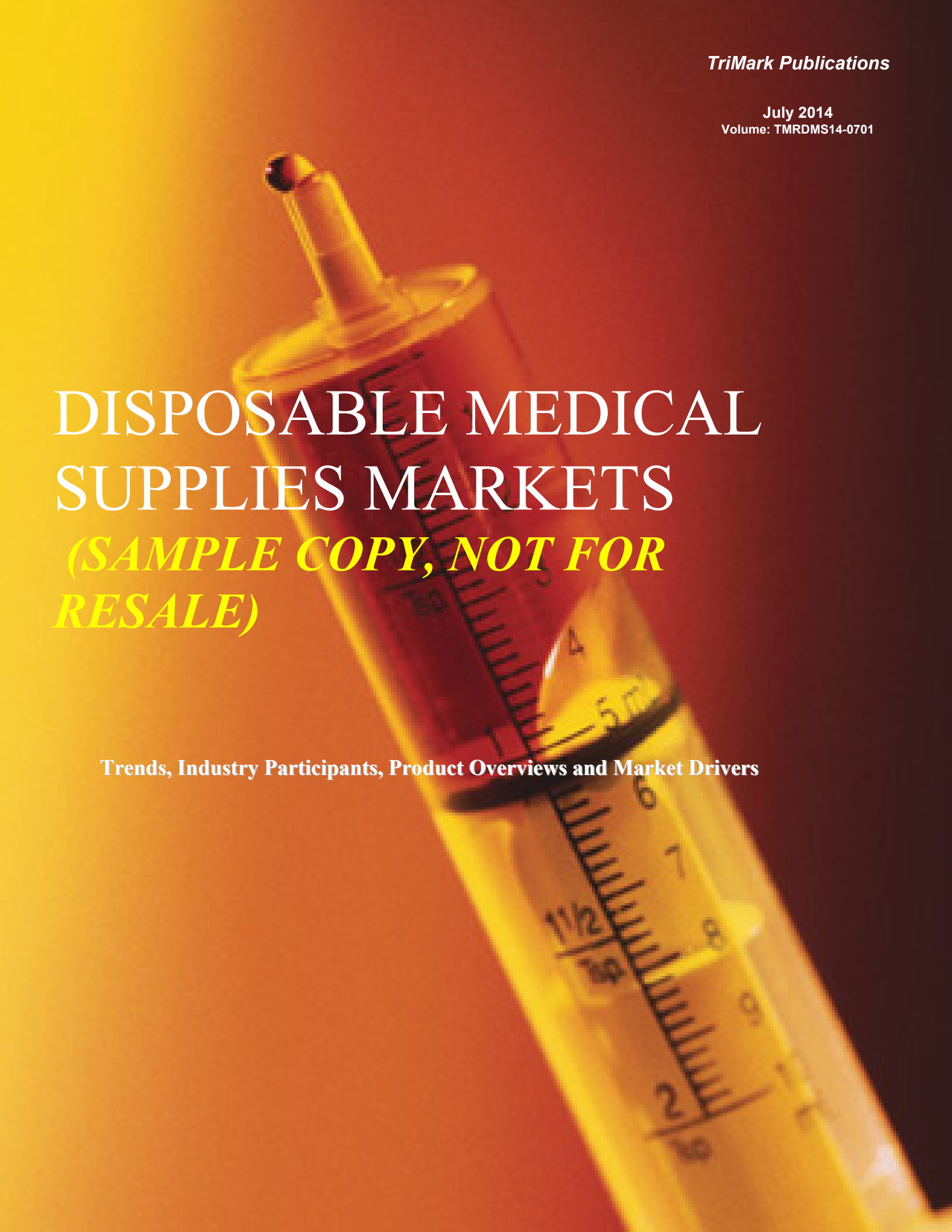

DISPOSABLE MEDICAL SUPPLIES MARKETS

(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. The U.S. is the world's largest disposable medical supplies market that accounts for a market share of over [redacted]%. Europe is the world's second largest market of disposable medical supplies, accounting for a market share of [redacted]%. Japan, China, India and other developing countries in the Asian region account for about [redacted]% of disposable medical supplies market share. The countries in the rest of the world (ROW) account for [redacted]% of the global market.

For the past two decades, disposable medical supplies have been witnessing a steady growth and this growth seems to be a continuous one due to the importance of their uses in healthcare settings. Disposable medical supplies with a huge volume of demand are products such as needles, syringes, pre-filled syringes, gloves, gowns and facemasks. The disposable medical supplies market has some [redacted] competitors, just in the U.S. alone. They are focused on thousands of different products, many of which keep changing as innovations yield improvements. These product groups witness different yearly growth rates, from [redacted]% to almost flat. On an average, the disposable segment has been growing at the rate of [redacted]% per year.

Disposable medical supplies provide many advantages that are recognized by a range of different consumers, from hospital staff, to private physicians and patients. Some of the disposable medical supplies such as bandages, gloves and gauze have been used in clinics, hospitals and doctors' offices for several decades. However, in the modern healthcare setting, a large number of products such as scalpels, thermometers, surgical gowns, gloves and syringes are available as disposable medical products. These medical supplies offer many benefits, including convenience and safety. Single-use disposable medical supplies can effectively reduce the risk of cross-contamination.

One of the principal threats to patients taking medical treatment is the risk of nosocomial infections, which are infections caused by treatment in a hospital or other healthcare unit. If a viral or bacterial infection spreads from one patient to another, the second patient has to suffer serious health consequences. Infections are transmitted between patients through exchanging bodily fluids, coughing, sneezing, and not washing hands. Additionally, medical devices that come in contact with viruses or bacteria can spread cross-contamination. Hospital-related infections pose serious problems for patients and the healthcare industry. The Centers for Disease Control and Prevention (CDC) estimates that there are [redacted] hospital-related infections every year that cause nearly [redacted] deaths in the U.S.

1.1 Objectives of this Report

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.

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. However, it is beyond the scope of this report to quantify the size of the broader market of non-disposable medical supplies. The reader should consult other TriMark Publications reports at www.trimarkpublications.com for details on individual market segments related to medical devices and supplies, including TriMark's *Disposable Syringe Markets* report.

1.2 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.

1.3 Executive Summary

The medical device and medical disposable supplies markets overlap each other in many segments of healthcare products. Therefore, this TriMark report, besides dealing in detail with the disposable medical supplies market, gives a fair amount of information on medical devices too. While sales and revenues in most industries declined due to worldwide recessions, the medical technology companies remain unhurt registering significant growth. The medical technology industry now generates revenue of over $[redacted] in annual revenue globally, excluding sales of diagnostics.

The medical device market embraces a variety of sub-industries, comprising product areas such as cardiovascular and orthopedic devices, wound care products, disposable supplies and durable equipment. Very few medical devices and supplies are capable of generating the kind of sales that blockbuster drugs are known for, yet, the greatest positive aspect of devices and supplies is that they require less development risk and are easier to bring to market than pharmaceuticals. The medical technology companies have two advantages over the pharmaceutical companies in making heavy investments for two reasons: medical devices and supplies provide a safe and predictable pathway to market than the pharmaceutical products and the products offer a more secured return.

Disposable medical supplies represent the largest segment within the global healthcare equipment and supplies sector, accounting for [redacted]% of the market's total value. The disposable products include syringes, catheters, electrodes, sutures, bandages, surgical gowns, surgical drapes, medical gloves, orthotics and prosthetics. Worldwide demand for disposable medical devices and supplies has been valued at $[redacted] in [redacted] and forecast to reach $[redacted] in [redacted]. The U.S. is the largest market for disposable medical devices and supplies, earning total revenues of $[redacted] in [redacted] with the potential to reach $[redacted] in [redacted]. Europe is the second largest market earning nearly about $[redacted] in [redacted] and it has the potential to reach $[redacted] in [redacted]. Within Europe, Germany is the largest market, followed by France. Italy and U.K. come third and fourth with almost the same market size. The market in developing countries keeps growing, mainly due to economic growth; increased spending by the respective governments on healthcare and the increased purchasing power of the general public. Thus, the ROW market is catching up with that of developed nations and has generated about $[redacted] in [redacted] and this figure is likely to reach $[redacted] in [redacted].

Among the medical disposables, wound care products remain the top selling segment with revenues of $[redacted] in [redacted] and this will reach $[redacted] in [redacted]. The different types of wound care products had the following market values in [redacted]: foam dressings ([redacted]), Hydrocolloids ([redacted]), film dressings ([redacted]), alginate dressings ([redacted]), hydrogels ([redacted]), anti-microbial dressings ([redacted]), tissue engineered products ([redacted]) and growth-factor products ([redacted]). There is an increasing trend towards expanding applications in the treatment of moderate-to-severe lacerations and this segment has been observed to grow fast. The demand for tissue sealants containing cyanoacrylates and bioengineered fibrins can be predicted to grow fast due to its superior binding qualities and fast healing advantages. The global wound closure products have generated revenues of about $[redacted] in [redacted] and the market has the potential to reach $[redacted] in [redacted]. In [redacted], the revenues generated by the different types of wound closure products are: sutures and staples ($[redacted]), sealants ($[redacted]), adhesives and tapes ($[redacted]).

Another disposable item used extensively in hospitals is the disposable syringe. The global disposable syringe market in [redacted] was worth about $[redacted] and it has the potential to reach $[redacted] in [redacted]. Prefilled syringes are gaining grounds in almost all the geographic segments and in [redacted] they had generated revenues of about $[redacted] that can be forecast to reach $[redacted] in [redacted]. Globally, the catheter market is an advanced one with well-known product lines, brand names and purchasing alliances. The market is constantly growing, as a significant sum of money is being spent on research and development to enhance the capabilities of existing catheters, improve safety features and identify novel medical applications. Catheters are used throughout the world for several procedures involving the administration or drainage of fluids from the body. Globally, the different types of catheters have a market value of about $[redacted] in [redacted] and this market has the potential to reach $[redacted] in [redacted]. The following are the market values of different types of catheters in [redacted]: cardiovascular catheter ($[redacted]), balloon catheter ($[redacted]), electrophysiology (EP) catheter ($[redacted]) and urological catheters ($[redacted]).

Disposable infusion devices form another category of disposable medical supplies. Disposable infusion devices are widely used both in public and private healthcare to offer therapies such as chemotherapy, antimicrobials, post-operative pain control and chronic pain management. These disposable products generated about $[redacted] revenues in [redacted] and the value will exceed $[redacted] in [redacted]. Ambulatory infusion pumps are used when the patients remain mobile while undergoing treatment. These devices help in reducing hospital visits through outpatient and home-care solutions, and therefore are seeing the strongest growth in almost all geographic regions. These products reached a value of $[redacted] in [redacted] and they have the potential to reach $[redacted] in [redacted]. These are used to administer a variety of therapies, including analgesics, narcotics, chemotherapy, and antibiotic or antiviral infusions.

Insulin pumps have made greater penetration in the U.S. market and in [redacted], the global market value for insulin infusion pump has been valued at $[redacted] and this value is likely to grow and reach $[redacted] in [redacted]. The U.S. and European markets for enteral feeding pump devices offer scope for steady growth between [redacted] and [redacted]. Enteral feeding market is expected to grow with the aging population and the growing number of premature infants in critical care all over the world especially in the U.S. and Europe. Europe is the largest market for these pumps and the U.S. stands second. Asia/Pacific region is seen as the fastest growing market with a CAGR of [redacted]%. Globally, the enteral feeding pumps have earned revenues of about $[redacted] in [redacted] and this revenue is anticipated to grow and reach $[redacted] in [redacted].

Procedure kits and trays constitute one of the largest segments within the disposable hospital supplies market. The general-use kit and tray market is highly segmented and includes more than [redacted] types of products. The general-use line comprises kits and trays used for lacerations, suture removal, enema, scrub and prep, total parenteral nutrition/ central venous pressure dressings and I.V. start, as well as custom kits for these procedures. The worldwide market for procedure kits and trays in [redacted] has been valued at $[redacted] and this is estimated to reach $[redacted] in [redacted].

One the most common types of disposable supplies used by medical practitioners are medical gloves. They are mainly used during examination and surgical procedures. Their main function is to prevent the transfer of blood, bodily fluids, highly contagious pathogens, toxic materials and other contaminants. The global market for disposable medical gloves in [redacted] has been estimated at $[redacted] and it is predicted to reach [redacted] in [redacted]. In [redacted], about [redacted] pieces of medical rubber gloves were sold globally and the number continues to grow by [redacted]% per year.

Global demand for nonwoven medical disposables is expected to increase by [redacted]% annually and the market has been worth about $[redacted] in [redacted]. The four broad groups of disposable medical supplies made from nonwoven textiles are gowns and drapes, nonwoven apparels, sterile packaging and sterilization wraps and nonwoven wound care products. The market values for these products in [redacted] have been valued at $[redacted] for gowns and drapes, $[redacted] for nonwoven medical apparels, $[redacted] for sterile packaging and sterilization wraps and $[redacted] for nonwoven wound care products.

While discussing in detail about the market opportunities for the above mentioned disposable hospital supplies, this TriMark report also provides data on the current and future demands for supplies such as ostomy care products, adult incontinence products for males as well as females. Though, these products have different CAGRs, all of them are consistently showing significant growth. One of the sections in appendix part of this report discusses elaborately about the opportunities for the U.S. medical devices and supplies companies in the European and Asia/Pacific countries.