North America Surgical Sutures Market Outlook to 2020

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GlobalData

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2 Introduction

Medical Equipment Market Reports are the ideal guide for anyone wishing to understand their market better in terms of revenues, unit sales, distributors and competitors.

2.1 What Is This Report About?

This report provides an overview and the following information related to the country, region, various categories, distribution share and competitive landscape in the market:

1. Comprehensive data related to the market revenue, unit sale, average price, company share and distribution share.
2. Corporate-level profiles of key companies operating in the Surgical Sutures market, which includes a brief overview of the company. The selection of the companies is based on their operational presence.
3. A list of key products under development by different companies. The selection of this list is based on the territory in which these products are being clinically investigated.
4. Key news and deals related to the Surgical Sutures market.

2.2 Surgical Sutures Market Segmentation

Surgical Sutures market is segmented as described below, in this report:

- **Surgical Sutures includes segments such as**
  1. Automated Suturing Devices
     - Automated Suturing Devices includes sub-segments such as Reusable Automated Suturing Devices and Disposable Automated Suturing Devices.
  2. Sutures
     - Sutures include sub-segments such as Absorbable Sutures and Non-Absorbable Sutures.

2.3 Definitions of Markets Covered in the Report

Surgical Sutures

Surgical sutures include automated suturing devices and surgical sutures.

Automated Suturing Devices

An automated suturing device is an instrument to facilitate suturing procedures during minimally invasive surgery and open surgery. It is inserted through small incisions and large open incisions in the body.

Automated suturing devices are majorly used in surgical procedures and major trauma cases which requires surgery. The usage of this device is negligible in the treatment of wounds and minor trauma cases which can be treated with the help of hand suturing techniques.

Automated suturing devices are segmented into disposable automated suturing devices and reusable automated suturing devices.

Reusable Automated Suturing Devices

Reusable automated suturing devices can be easily sterilized by standard hospital processes and reused. It consists of cartridge containing the needle (with suture attached) which is engaged by the device's internal drive mechanism and it is driven through the sternum to be sutured. Then the suture is completely passed through the tissue. Sutures and needles are not tracked under this segment. One unit refers to one reusable automated suturing device.

Disposable Automated Suturing Devices

Disposable automated suturing devices are single use devices. It consists of handle, a toggle lever, a needle holder secured inside the jaws and needle. Sutures are not tracked under this segment. One unit refers to one disposable automated suturing device.

Sutures

Surgical sutures are used to hold tissues together after injury or surgery to enhance the natural healing process. They are commonly used on the skin, internal tissues, organs and blood vessels. Absorbable and non-absorbable sutures are tracked under this category. Sutures that are used in all types of surgical procedures are included under this category. One unit includes a box of 12 sutures.

Suture needles are not tracked under this category.

Absorbable Sutures

An absorbable suture that is used in surgery is absorbed or broken down by the human body after a given period of time. Sutures made up of natural materials such as catgut and synthetic materials which include polyglycolic acid, polydioxanone, polyglactin, polyglyconate, polyglecaprone and caprolactone have been tracked under this segment. One unit includes a box of 12 sutures.

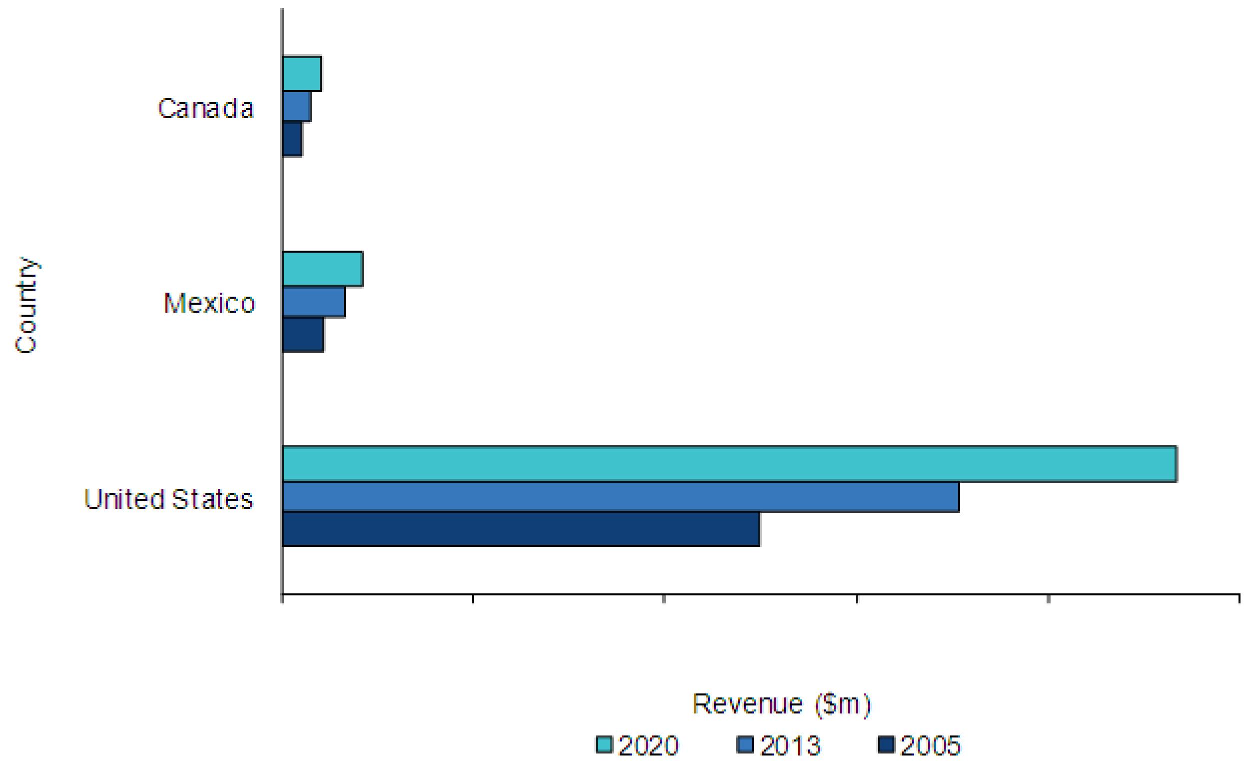
Non-Absorbable Sutures

A non-absorbable suture is made up of a material unaffected by biological body mechanisms and needs to be removed after a specified time. Sutures made of silk, nylon; polypropylene and polyester have been tracked under this segment. One unit includes a box of 12 sutures.

3 Surgical Sutures Market, North America

3.1 Surgical Sutures Market, North America, Revenue ($m), 2005-2020

Figure 1: Surgical Sutures Market, Cross Country Comparison, North America, Revenue ($m), USD Constant, 2005-2020



Source: GlobalData

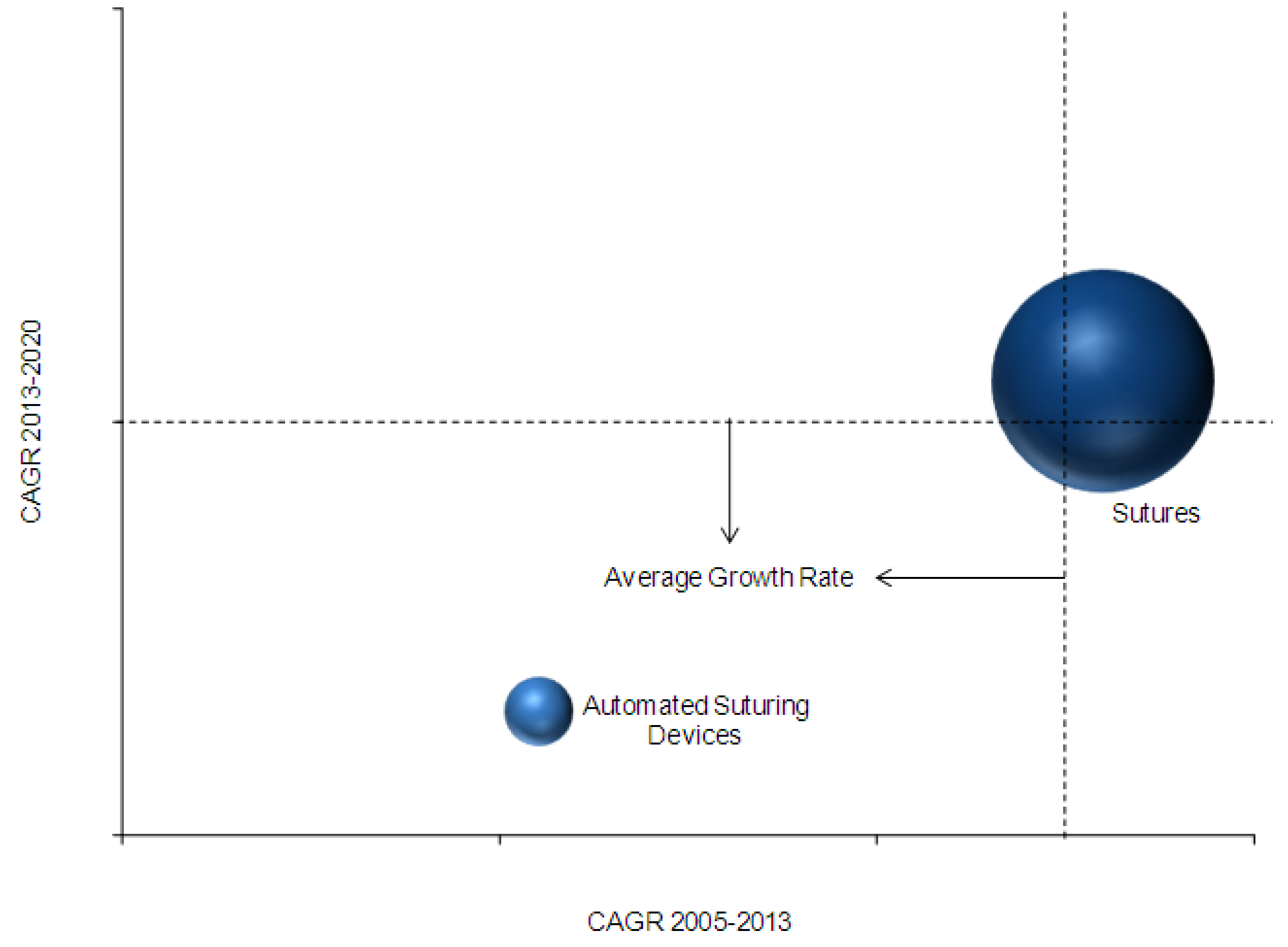
Table 1: Surgical Sutures Market, Cross Country Comparison, North America, Revenue ($m), USD Constant, 2005-2020

Country Name	2005	2013	2020	CAGR 05-13	CAGR 13-20	CAGR 05-20
United States						
Mexico						
Canada						
Total						

Source: GlobalData

3.2 Surgical Sutures Market, North America, Category Comparison by Revenue ($m), 2005-2020

Figure 2: Surgical Sutures Market, North America, Category Comparison by Revenue ($m), USD Constant, 2005-2020



Source: GlobalData

Table 2: Surgical Sutures Market, North America, Category Comparison by Revenue ($m), USD Constant, 2005-2020

Category	2013	CAGR 05-13	CAGR 13-20
Sutures			
Automated Suturing Devices			

Source: GlobalData

9 Appendix

The data and analysis within this report are driven by Medical eTrack. Medical eTrack gives you the key information required to drive sales, investment and deal-making activity in your business. It includes the following:

- 15,000+ data tables showing market size across more than 780 medical equipment segments and 15 countries, from 2005 and forecast to 2020
- 6,000+ primary expert interviews, conducted annually to ensure data and report quality
- 1,100+ medical equipment conference reports
- 1,000+ industry-leading reports per annum, covering growing sectors, market trends, investment opportunities and competitive landscape
- 600+ analysis reports, covering market and pipeline product analysis, by indication; medical equipment trends and issues, and investment and M&A trends worth over $3m
- 50,000+ medical equipment company profiles
- 2,000+ private, emerging and technology start-up company profiles
- 4,000+ company profiles of medical equipment manufacturers in China and India
- 2,000+ company profiles of medical equipment manufacturers in Japan
- 825+ companies' revenue splits and market shares
- 1,100+ quarterly and annual medical equipment company financials
- 700+ medical equipment company SWOTs
- 14,900+ pipeline product profiles
- 18,700+ marketed product profiles
- 27,600+ clinical trials
- 20,000+ trial investigators
- 20,600+ new product patents
- 3,700+ reports on companies with products in development
- 21,500+ reports on deals in the medical equipment industry
- 1,300+ surgical and diagnostic procedures by therapy area
- 50+ key healthcare indicators by country

For more information or to receive a free demonstration of the service, please visit:

http://www.medicaletrack.com/ContactUs.aspx?Id=RequestDemo

9.1 Research Methodology

GlobalData's dedicated research and analysis teams consist of experienced professionals with advanced statistical expertise and marketing, market research and consulting backgrounds in the medical devices industry.

GlobalData adheres to the codes of practice of the European Pharmaceutical Marketing Research Association (http://www.ephmra.org/).

All GlobalData databases are continuously updated and revised.

9.1.1 Coverage

The objective of updating GlobalData's coverage is to ensure that it represents the most up-to-date vision of the industry possible.

Changes to the industry taxonomy are built on the basis of extensive research of company, association and competitor sources.

Company coverage is based on three key factors: revenue; product and media attention; and innovation and market potential.

The estimated revenue of all major companies, both private and public, are gathered and used to prioritize coverage.

GlobalData aims to cover all major news events and deals in the medical devices industry, updated on a daily basis. The coverage is further streamlined and strengthened with additional input from GlobalData's expert panel.

9.1.2 Secondary Research

The research process begins with extensive secondary research using internal and external sources to gather all relevant data and information pertaining to a particular market model for a particular country. The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings
- Industry trade journals, scientific journals and other technical literature
- Association and healthcare organization websites
- PubMed, Medscape and other relevant services which compile extensive reviews of clinical literature
- Internal proprietary databases
- Relevant patent and regulatory databases
- National government documents, statistical databases and market reports
- Procedure registries
- News articles, press releases and web-casts specific to the companies operating in the market

9.1.3 Primary Research

GlobalData conducts interviews with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- Provides first-hand information on market size, market trends, growth trends, competitive landscape and future outlook
- Helps to validate and strengthen secondary research findings
- Further develops the analysis team's expertise and market understanding

Primary research involves email correspondence, telephone interviews and face-to-face interviews for each market, category, segment and sub-segment across a range of geographies.

The participants who typically take part in such a process include, but are not limited to:

  - Industry participants: CEOs, VPs, marketing/product managers, market intelligence managers and national sales managers
  - Distributors, paramedics and representatives from hospital stores, laboratories and pharmacies
  - Outside experts: investment bankers, valuation experts and research analysts that specialize in specific medical equipment markets
  - Key opinion leaders: physicians and surgeons that specialize in the therapeutic areas in which the medical device is used

The market data was validated based on the inputs from 1,725 primary research participants. The primary research participants included stakeholders from demand side such as Nurses, Surgeons, Paramedics and Physicians as well as participants from the supply side such as the Marketing Managers, Sales Managers and Product Managers of companies manufacturing/marketing wound care products.

Table 58: Total Number of Primary Research Participants, Wound Care Management, by Country	
Country	**Total Number of Primary Research Participants**
United States	172
Brazil	143
India	140
United Kingdom	128
Italy	120
Australia	118
Canada	114
Germany	111
France	111
Spain	108
Russia	101
Mexico	99
China	94
South Korea	90
Japan	76
Total	**1,725**

Source: GlobalData

9.1.4 Market Modeling and Forecasting

GlobalData uses an epidemiology-based treatment flow model and capital equipment-based model to estimate and forecast market size.

Epidemiology-Based Market Model and Forecasting

The epidemiology-based forecasting model uses epidemiology data gathered from research publications and primary interviews with physicians to establish the target patient population and treatment flow pattern for individual diseases and therapies. The data covers prevalence, incidence, diseased population, diagnosed population, and treatment population.

- The market forecast begins with the general population, the size of which varies depending on the indication.
- Prevalence is the percentage of the total population that suffers from a particular disease or condition.
- Incidence is the number of new cases of a condition, symptom, death or injury that develop during a specific time period, such as one year.
- The diseased population is the population suffering from a particular disease or condition.
- The diagnosed population is the population that has been diagnosed with a particular disease or condition, expressed as a percentage of the prevalence population.

- The treatment population is the percentage of the population that has been diagnosed with a particular disease or condition.
- Device uptake is the percentage of the treatment population using a particular device, determined based on the primary responses and the information available in secondary sources.

The epidemiology-based forecasting model for a medical device is used to:

- Determine the patient segment using a particular device or procedure
- Determine the frequency of usage of a particular device depending on the patient type, which further helps to determine the absolute unit sales of a device in a year

The market for any medical device is directly proportional to the volume of units sold and the price per unit.

Market size = volumes of units sold X ASP (Average Selling Price)

The volume of units sold is calculated from the number of patients using or that has been implanted with the device. Data on treatment rate, diagnosis and surgical treatment rate, if unavailable from research publications, is gathered from interviews with physicians and used to estimate the patient volume for the disease under consideration.

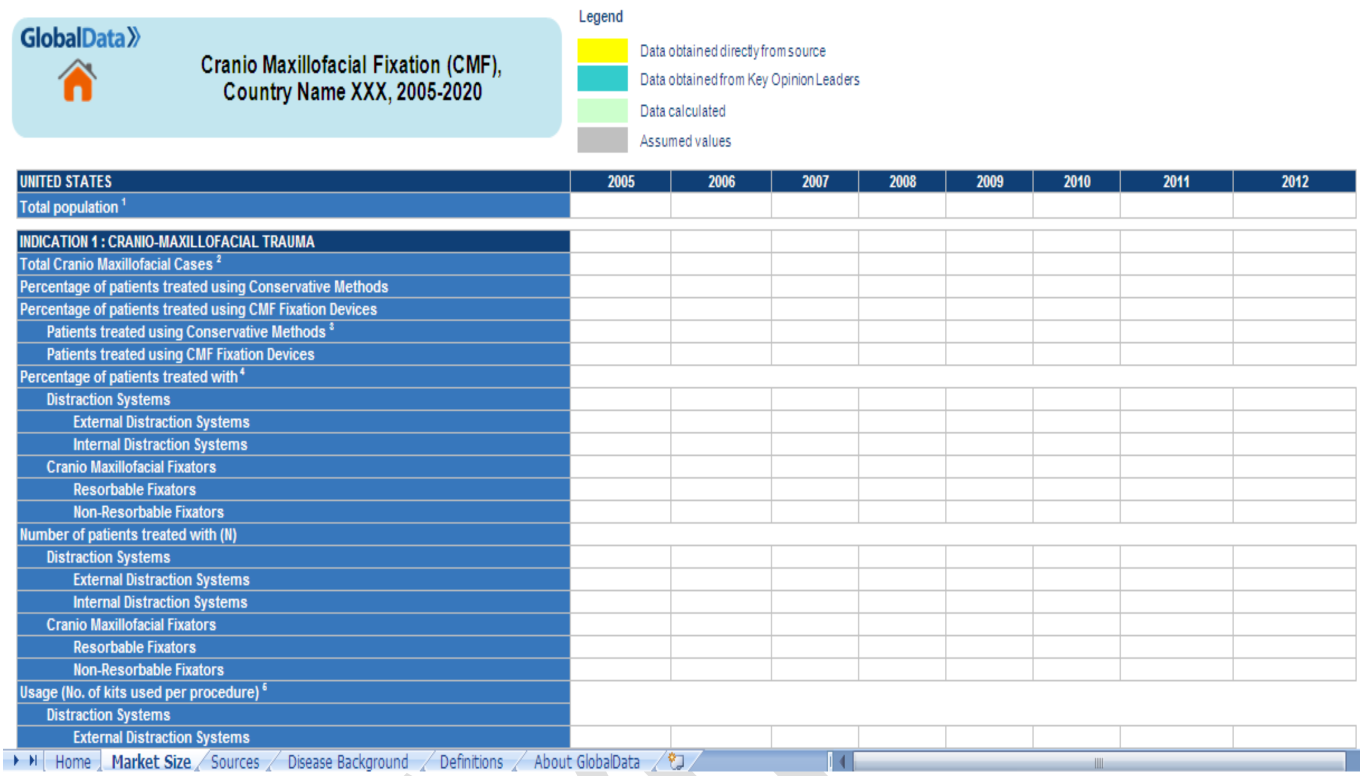
The ASP of a device is mostly gathered from primary and secondary sources. ASP is the price at which a device is available in a target country to an end-user. For capital equipment, the end-user is typically considered to be the healthcare setting. For implants and consumables purchased by patients, the end-user is the patient.

Factors such as company share, reimbursement, company type (local/domestic or multinational) are taken into consideration during ASP analysis, which uses the following sources:

- Company websites
- Annual reports/industry reports
- Press releases

Epidemiology-Based Forecasting Model

Figure 48: GlobalData Epidemiology-Based Forecasting Model


GlobalData
Cranio Maxillofacial Fixation (CMF), Country Name XXX, 2005-2020

Legend
Data obtained directly from source
Data obtained from Key Opinion Leaders
Data calculated
Assumed values

UNITED STATES	2005	2006	2007	2008	2009	2010	2011	2012
Total population [1]								
INDICATION 1 : CRANIO-MAXILLOFACIAL TRAUMA								
Total Cranio Maxillofacial Cases [2]								
Percentage of patients treated using Conservative Methods								
Percentage of patients treated using CMF Fixation Devices								
Patients treated using Conservative Methods [3]								
Patients treated using CMF Fixation Devices								
Percentage of patients treated with [4]								
Distraction Systems								
External Distraction Systems								
Internal Distraction Systems								
Cranio Maxillofacial Fixators								
Resorbable Fixators								
Non-Resorbable Fixators								
Number of patients treated with (N)								
Distraction Systems								
External Distraction Systems								
Internal Distraction Systems								
Cranio Maxillofacial Fixators								
Resorbable Fixators								
Non-Resorbable Fixators								
Usage (No. of kits used per procedure) [6]								
Distraction Systems								
External Distraction Systems								

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Source: GlobalData

Capital Equipment-Based Market Model and Forecasting

The capital equipment-based forecasting model is based on the installed base, replacements and new sales of a specific type of capital equipment in healthcare facilities such as hospitals, clinics and diagnostic centers. The installed base is calculated from the average number of units per facility. Sales for a particular year are arrived at by calculating the number of replacement units and new units (additional and first-time purchases). Secondary sources and interviews with supply-side participants and key opinion leaders from healthcare facilities are used to arrive at installed base and unit sales for a particular year. The factors typically affecting the forecast growth rates are:

- Growth in the number of healthcare facilities
- Healthcare spending and government programs and initiatives
- Migration from low-end equipment to high-end equipment
- Growth in the diagnosed population and treatment population

Capital Equipment-Based Forecasting Model

Figure 49: GlobalData Capital Equipment-Based Forecasting Model

GlobalData

Orthopedic Tools,
Country Name XXX, 2005-2020

Legend
- Data obtained directly from source
- Data obtained from Key Opinion Leaders
- Data calculated
- Assumed values

UNITED STATES	2005	2006	2007	2008	2009	2010	2011	2012
Total number of hospitals [1]								
Shortlisted hospitals (excludes Psychiatric and Tuberculosis hospitals) [2]								
INSTALLED BASE OF ORTHOPEDIC TOOLS PER HOSPITAL								
Average number of Orthopedic Tools installed per hospital [3]								
INSTALLED BASE OF ORTHOPEDIC POWER TOOLS PER HOSPITAL								
Average number of Orthopedic Power Tools installed per hospital [4]								
TOTAL NUMBER OF ORTHOPEDIC POWER TOOLS IN ALL HOSPITALS								
Total installed base of Orthopedic Power Tools in all hospitals								
Average life span of an Orthopedic Power Tool (in years) [5]								
Potential replacement of Orthopedic Power Tools in all hospitals per year								
Actual replacement of Orthopedic Power Tools in all hospitals per year [6]								
Total replacement of Orthopedic Power Tools in all hospitals per year								
INSTALLED BASE OF ORTHOPEDIC REAMERS PER HOSPITAL								
Average number of Orthopedic Reamers installed per hospital [7]								
TOTAL NUMBER OF ORTHOPEDIC REAMERS IN ALL HOSPITALS								
Total installed base of Orthopedic Reamers in all hospitals								
Average life span of an Orthopedic Reamer (in years) [8]								
Potential replacement of Orthopedic Reamers in all hospitals per year								
Actual replacement of Orthopedic Reamers in all hospitals per year [9]								
Total replacement of Orthopedic Reamers in all hospitals per year								

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Source: GlobalData

9.1.5 Company Share Analysis

Company shares are calculated by analyzing a company's sales in a particular market. In the case of public companies, annual reports and regulatory filings, investor presentations, earnings call transcripts and broker reports are used to determine a company's revenue in a particular market and in a particular geography.

In the case of the private companies, company share data is gathered mostly from primary interviews and secondary sources. Company share analysis is based on primary interviews with:

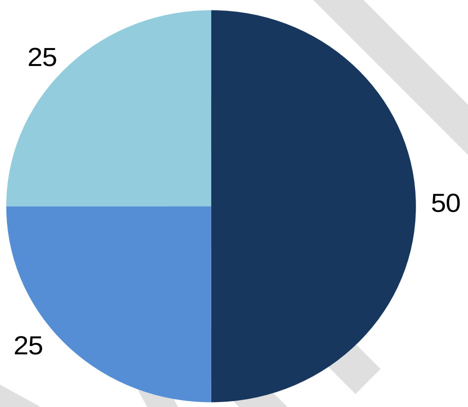
- Supply side (manufacturers)
- Procurement side
- Distributors
- Hospital purchasing groups
- Demand side (surgeons/specialists)

The benefits of this approach are:

- High number of respondents to validate and from which to derive accurate company shares
- Broad view from the supply, demand, and procurement side
- Prevents biased opinions being reproduced
- Demand-side interviews with key opinion leaders help to understand their preferences for the devices of specific companies, strengthening company share estimates

Primary Interviews by Participant Type

Figure 50: Primary Interviews by Participant Type (%)



The final company share data is based on input from the supply side, the procurement side and the demand side, as well as secondary sources. Please note that market share for companies that are included under the 'Others' category is not tracked on an individual basis.

9.1.6 Distribution Share Analysis

Distribution share information is gathered using a combination of secondary and primary research. It is supported by primary interviews because the availability of secondary data is limited in most cases.

9.2 Expert Panel

GlobalData uses a panel of experts to cross-verify its databases and forecasts.

GlobalData's expert panel comprises marketing managers, product specialists, international sales managers from medical device companies, academics from research universities, key opinion leaders from hospitals, consultants from venture capital funds and distributors/suppliers of medical equipment and supplies.

Historic data and forecasts are relayed to GlobalData's expert panel for feedback and adjusted accordingly

9.3 GlobalData Consulting

We hope that the data and analysis in this brief will help you to make informed and imaginative business decisions. If you have further requirements, GlobalData's consulting team may be able to help you. GlobalData offers tailor-made analytical and advisory services to drive your key strategic decisions.

9.4 Disclaimer