Catheters

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#RAK051203CC (Typical Database Analysis Example)-Foley Catheters

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Data Range: FY2000 – FY2003

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Project: RAK051203CC (Typical Database Analysis Example)-Foley Catheters

Analysis Objective: Overview Market Segment Analysis for Foley Catheters; USA & Canada, currency converted to $, USD's.

Illustration

PAM, TAM, SAM, SOM[1]

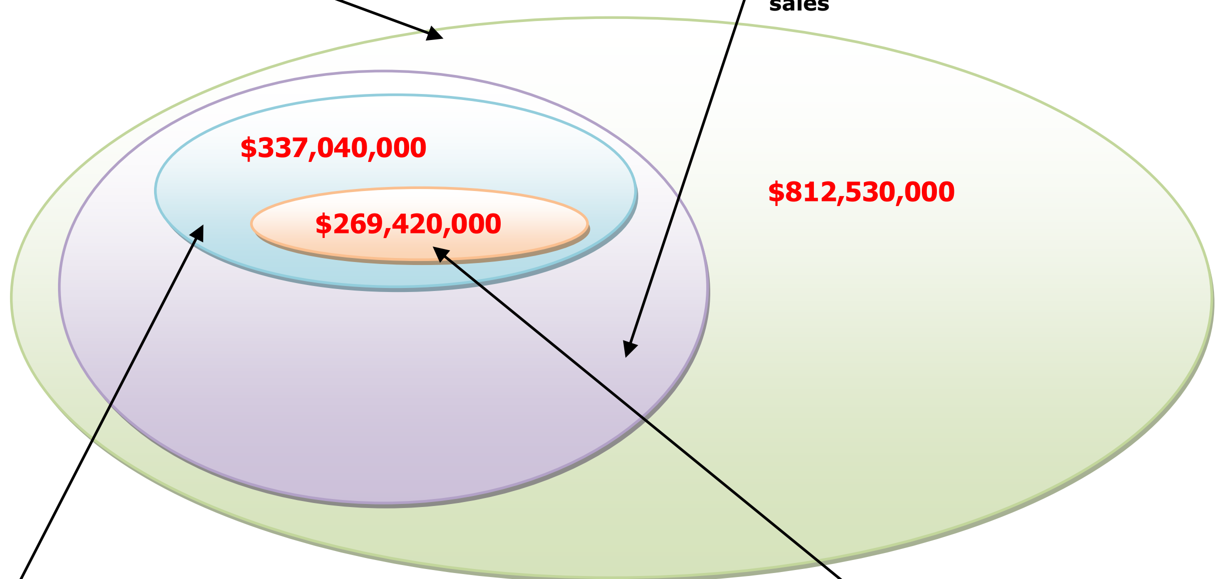
Urological Catheter & related product Market Overview (See Segment Description Overview)

eFY2003

($ in USD's at non-retail)

PAM: $ 812,530,000 Worldwide urological catheter & related product sales

TAM: $363,130,000 North American urological catheter & related product sales



SAM: $337,040,000 urological catheter & related product sales, United States

SOM: $269,420, 000 Foley Catheters, United States

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[1] See www.rakassociates.com , point & click on "Medical Product Search" and review PAM, TAM, SAM, SOM definitions.

Market Segment Analysis Description

Segment Description Overview: The urological catheter market segment (PAM) encompasses catheter and related products ranging from the traditional, disposable/reusable catheters used in inpatient surgical, critical care, etc., all used for urological applications.

Table 1.0[2]

PAM/TAM/SAM (Urological) Catheter & Related Product Market Overview FY2000 – eFY2003

(Currency converted to $, USD's)

	FY2000	FY2001	FY2002	eFY2003	% AAGR[3]
Worldwide-Urologicals (PAM)	$690,000,000	$728,640,000	$769,440,000	**$812,530,000**	5.9%
North America[4]-Urologicals[5] (TAM)	$287,490,000	$303,590,000	$332,150,000	**$363,130,000**	8.8%
United States-Urologicals (SAM)	$266,000,000	$280,890,000	$307,700,000	**$337,040,000**	8.9%
Canada-Urologicals (SAM)	$11,370,000	$12,010,000	$13,160,000	$14,410,000	8.9%
Mexico-Urologicals (SAM)	$10,120,000	$10,690,000	$11,290,000	$11,690,000	5.1%

In the broadest terms, the continuation of population aging within developed countries increasingly drives the growth of this market segment. As healthcare expenditure pressures continue to increase, the combination of cost containment measures including third party reimbursement rate reductions, shifting to lower cost alternate (non hospital) sites, and outpatient surgery will continue to drive product innovation fundamentally on the grounds of reducing "disease morbidity".

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[2] Sources: IMS Health, Theta Reports, First Filter Ltd, RAK Associates and Industry Sources (Revenue at non-retail)
[3] %AAGR represents "Annual Average Growth Rate.
[4] North America (TAM) includes Canada, United States, and Mexico.
[5] Urologicals include Foleys (Strips and Trays), Drainage Bags, Urethrals (Strips and Trays) and Urine Meters.

The introduction and rapid penetration of lubricant-coated catheters for urethral (intermittent) use, increased usage of antimicrobial coatings along with continued development directed at coatings having a thrombolytic effect will continue to drive product innovation within many countries for the Urological segment.

Urological catheter sales are expected to benefit from the expansion of the aging population and continued growth of surgical procedures. Growth of the general population and in particular in the 65+ age group, both within the United States and Canada, is anticipated to be a contributing factor in raising hospital admissions. Extended care facilities appear to favor "uretheral usage" due to less risk of infection and lower pricing. Hence, as surgery increases, the need to treat urinary retention will also, as Foleys and urethrals experience increased usage in relieving that condition.

Table 1.1[6]
SOM[7] Catheter Market: Foley Catheters[8]
FY2000 – eFY2003

(Currency converted to $, USD's)

	FY2000	FY2001	FY2002	eFY2003	% AAGR
United States-Foley's (In USD's)					
Trays	$202,750,000	$214,100,000	$234,260,000	$255,580,000	8.7%
Strips	$11,260,000	$11,890,000	$13,440,000	$13,840,000	7.6%
Total Market (SOM) (Assorted Fr. Sizes)	$214,010,000	$225,990,000	$247,700,000	**$269,420,000**	8.6%
Canada-Foley's (In USD's)					
Trays	$7,070,000	$7,390,000	$7,990,000	$8,870,000	8.5%
Strips	$3,500,000	$3,700,000	$4,260,000	$4,430,000	8.9%
Total Market (SOM) (Assorted Fr. Sizes)	$10,570,000	$11,090,000	$12,250,000	$13,300,000	8.6%

6 Encompasses hospitals, outpatient, and extended care.
7 PAM/TAM/SAM/SOM Refer to www.rakassociates.com, point and click on "Medical Product Search" for detailed explanation of Potential Available Market (PAM), Total Available Market (TAM), Served Available Market (SAM) and Share of Market (SOM).
8 Note: CR Bard and Kendall (Tyco) dominate both the United States and Canadian markets, commanding greater than 60% market share for Foley catheters (strips) and trays.

Table 1.2[9]

SOM Catheter Market: Foley Catheters[10]
FY2000 – eFY2003

(Units)

		FY2000	FY2001	FY2002	eFY2003	% AAGR
United States-Foley's (Assorted Fr. Sizes)						
	Trays	14,400,000	15,400,000	17,000,000	19,000,000	10.6%
	Strips	4,800,000	5,200,000	6,000,000	6,300,000	10.4%
Canada-Foley's (Assorted Fr. Sizes)						
	Trays	500,000	530,000	580,000	650,000	10.0%
	Strips	1,490,000	1,600,000	1,900,000	2,000,000	11.4%

[9] Encompasses hospitals, outpatient, and extended care.
[10] Key to understanding the Foley market within the United States and Canada is the utilization of pre-connected system. The United States market is dominated by tray revenue due to the use of "pre-connected" systems. Wherein, Canada is the reverse, as that country has not completely adopted the pre-connected system.