

Disposable Injection Devices

Products, Players and Prospects

February 2007



Greystone Associates

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The recent escalation in new biological drugs, including antibodies and recombinant proteins, is placing renewed emphasis on drug injection.

A number of factors are converging to create both risk and opportunity for parenteral drug makers and their device partners.

These factors are giving rise to a new generation of sophisticated, application-specific disposable injection devices designed to satisfy caregiver and patient preferences while addressing managed care initiatives and the limitations of new classes of therapeutic drugs.

Because of their ability to safely and reliably satisfy treatment protocols and compliance goals, these new devices will have a significant impact on the future of patient care.

Greystone Associates is pleased to announce the publication of a new market study. **Disposable Injection Devices: The Next-Generation** is a comprehensive evaluation and analysis of the technology, products and participants providing the driving force behind this growing segment of the parenteral drug delivery sector.

Published in February (2007), the study is designed to provide pharmaceutical decision makers, device developers, healthcare marketers, injection product manufacturers, and supply chain participants with a detailed understanding of the economics, technologies, therapies, and potential for new and emerging disposable injection devices, and to identify business opportunities for disposable injectors within the healthcare industry. Provider organization business managers, healthcare administrators and investors will also benefit from this study.

Advancing Technology and Tailored Delivery Devices

While alternative methods for delivering therapeutics to patients have had some notable successes, most drugs continue to be delivered either orally or by injection. Because they cannot tolerate the first-pass metabolism of the digestive tract, the recent escalation in new biological drugs, including antibodies and recombinant proteins, is placing renewed emphasis on drug injection. Now a number of factors are converging to create both risk and opportunity for parenteral drug makers and their device partners. These include new classes of drugs for previously refractory conditions, the growing trend toward self-administration for chronic diseases, shifting patient demographics in industrial countries, caregiver safety legislation, and continued pressure to control healthcare costs.

These factors are giving rise to a new generation of sophisticated, application-specific disposable injection devices designed to satisfy caregiver and patient preferences while addressing managed care initiatives and the limitations of new classes of therapeutic drugs. To achieve commercial success for this new generation of devices, higher levels of cooperation among designers, manufacturers, and developers are needed, and first-line development concepts such as concurrent engineering and design for manufacturing are becoming the rule rather than the exception. Because of their ability to safely and reliably satisfy treatment protocols and compliance goals, these new devices will have a significant impact on the future of patient care.

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Injectable Drug Delivery Market Overview

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- The Impact of Injectable Self-Administration
- Population Demographics
- Preventative Medicine – It's Evolving Role in Healthcare
- Market Sector Dynamics
- Competitive Landscape

Disposable Syringe & Injector Design & Technology

- Safety Syringes
- Autoinjectors
- Microneedle Injectors
- Needle-free Injectors
- Pen Injectors

Disposable Device Market Drivers

- Safety
 - Sharps Cross-contamination
 - Disposal Issues
- Regulation
- Caregiver Sentiment
- Managed Care & Cost Containment

Disposable Syringe & Injector Markets

- Healthcare/Practitioner
 - Wellness/Vaccinations
 - Drug Therapy
- Clinic/Hospital
- Self-Administration
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Next-Generation Disposable Injection Devices

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 - Profiles of Commercial Devices

Market Factors

- Government Regulations
- Health Standards Organizations
- Rx-to-OTC Switching
- Alliances & Collaborations
- Private Labeling

Company Profiles

Market Data

The study presents qualitative and quantitative data and information on key market measures and benchmarks:

- Market Size by Segment
- Company Profiles
- Product Status & Prospects
- Industry Structure
- Cost & Pricing Factors
- Emerging Markets
- Technology Factors
- Economic Factors
- Injector Design Criteria
- Market Projections
- Strategic Alliances
- Proprietary Technology
- Market Penetration Factors
- Regulatory Factors

Methodology

Research methodology is based on primary research in the form of in-depth interviews with key market participants, technology developers, distributors, industry experts, and market influencers, a list that includes regulatory officials, industry trade groups, and materials standards organizations.

Primary data is evaluated and normalized against secondary sources including trade journal articles, technical literature, industry publications, company data sheets and published information, and statistical data from government agencies and trade associations.

Forecasts and projections of market demand and future market activity are derived using standard modeling and statistical techniques

Feature Summary

- Analyzes and evaluates the new generation of disposable injection devices and assesses the market potential for existing and probable future devices
- Analyzes product designs, technologies and market development issues
- Provides detailed descriptions of disposable device market drivers, design approaches, and business strategies
- Forecasts device usage 2010
- Profiles disposable injector companies, their product development activities, business strategies, and corporate alliances and affiliations
- Evaluates the impact of economic, technology, and regulatory factors on parenteral drug delivery markets

Report Format and Availability

This report is available in hard copy or electronic format. A site license for a single physical location and a global license are also available. Publication is scheduled for February 2007, with availability on or before February 15th.

About Greystone Associates

Greystone Associates is a medical technology consulting firm focused on the areas of medical market strategy, product commercialization, venture development, and market research. We assist medical and healthcare market participants in achieving their business objectives through the creation of detailed development strategies, product commercialization programs, and comprehensive market and technology research and analysis.

Our market research publications are designed, researched and written to provide timely and insightful information and data on focused market segments, with the aim of providing market participants with the essential knowledge to refine and execute their marketing plans and financial targets.

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