

# Retractable Safety Syringes

Devices, Strategies, Markets and Opportunities



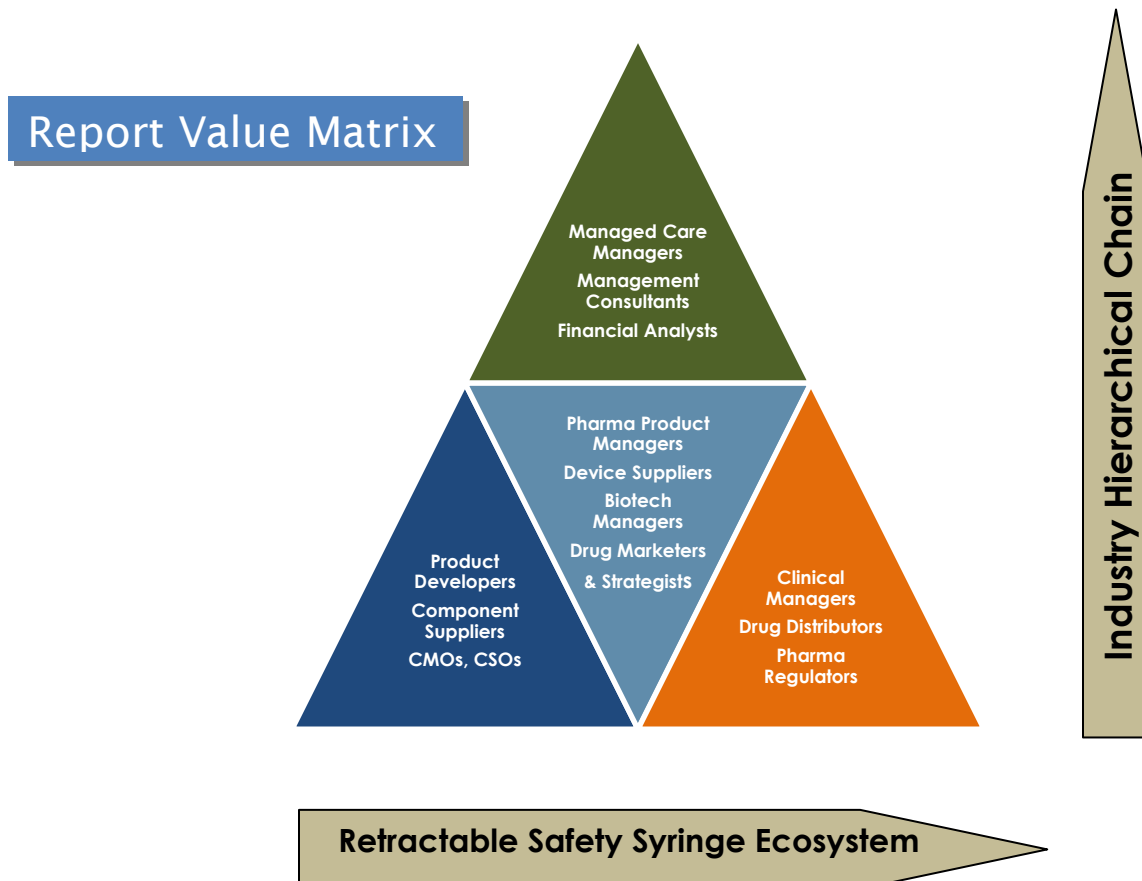
Greystone Associates is pleased to announce the publication of a new market study. **Retractable Safety Syringes: Devices, Strategies, Markets and Opportunities** is a comprehensive evaluation and analysis of the technology, products and participants providing the driving force behind this growing segment of the drug delivery sector.

The report has been designed and developed to provide pharmaceutical company decision makers, drug developers and formulators, drug device designers, and industry strategists with a detailed understanding of the expanding impact of retractable safety syringes on pharmaceutical strategies and healthcare delivery. Provider organization business managers, healthcare administrators and investors will also benefit from this publication.

## User Friendly Devices that Address Safety and Legal Issues

Concern over sharps cross-contamination and caregiver safety continues to drive technology and commercial innovation in the safety syringe sector. Following the lead of the Needlestick Safety and Prevention Act in the U.S., government regulations regarding syringe needle handling and disposal continue to spread, fostering increased demand in the use of safety syringes. An estimated 5.6 million healthcare workers routinely handle medical sharps. Information from the U.S. Centers for Disease Control suggests that 600,000 to 800,000 percutaneous exposures occur each year in the U.S.

While safety syringe products encompass a broad range of design approaches including manual and auto disabling devices, retractable syringes represent the most elegant approach to addressing the caregiver sharps risk issue by eliminating the need for a sharps disposal step. New retractable designs address caregiver preferences and mitigate the cost premium associated with retractable models. While more than fifty companies compete in the safety syringe sector, only a handful companies manufacture and/or market safety syringes that influence the competitive landscape. As supply agreements are executed, we expect price points to begin to close the remaining gap between these devices and traditional syringe devices.



## **Executive Summary**

### **Injectable Drug Delivery Market Dynamics**

- Drug Discovery Trends
- Demographic Shifts
- Managed Care Initiatives
- Caregiver Safety
- Growth in Home Healthcare
- Technology Market Drivers
- Device Strategies

### **Safety Syringe Design Factors**

- Retractable Technology
- Automatic vs Manual Retraction
- Retraction Mechanisms
- Competing Safety Syringe Designs
- Design Considerations
  - Prefilled Syringes
  - Lyophilized and Powder Drugs
  - Specialty Applications

### **Safety Syringe Commercialization Factors**

- Managed Care and Healthcare Economics
- Outsource Manufacturing
  - Outsourcing Strategies
  - Profiles of Key RSS Contract Manufacturers
- Alliances and Private Labeling

### **Market Factors**

- Regulations
  - FDA
  - EMA
  - Pharma & Medical Devices Agency (Japan)
  - Therapeutic Goods Administration (Australia)
- Emerging Biologicals
- The Distribution Ecosystem

### **Branded Retractable Syringe Assessments**

### **Retractable Syringe Geographic Market Analysis**

- North America
- Europe
- Australia
- Other Geographies

### **Demand Picture for Important Syringe Markets**

- Critical Care Hospitals
- Clinics and Ambulatory Care Facilities
- Large Managed Care Practices
- Independent Physician Practices
- Long-term Care Facilities
- Medical Research
- Self-Administration

### **Sector Participant Company Profiles**

## Feature Summary

- Analyzes and evaluates retractable safety syringe products and assesses the market potential for existing and probable future products
- Analyzes product designs, technologies and market development issues
- Provides detailed descriptions of safety syringe market segments, market demographics, and business strategies
- Charts product sales data, market share, and forecasts to 2014
- Profiles retractable syringe companies, their product development activities, business strategies, and corporate alliances and affiliations
- Assesses the importance of pharma-device alliances and design partnerships on future safety syringe products
- Evaluates the impact of economic, technology, and regulatory factors on parenteral drug delivery markets

## Report Format and Availability

This report is available electronic format. A site license for a single physical location and an Enterprise license are also available.

## 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.

## 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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