

The Market for Hospital-Acquired Infection Control (Sterilization, Disinfection, Testing and Treatment)

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Abstracts

Given the cost of hospital-acquired and healthcare-associated infections (HAIs), demand has increased for solutions that can help the healthcare industry reduce infections and the costs associated with them. The U.S. Centers for Disease Control and Prevention (CDC) estimates that around 1 in 20 or 5% of hospitalized patients will contract an HAI. Worldwide, the rate of nosocomial infections is between 3.5% and 12% of admissions in developed regions. This has created a market opportunity for companies that can test for, treat and help prevent these infections. This opportunity is detailed in Kalorama Information's report, *The Market for Hospital-Acquired Infection Control (Sterilization, Cleaning, Testing, Treatment)*

This report focuses on preventing, testing and treating infections in the healthcare environment. The major consideration is given to bacterial nosocomial infections because a) they are the most frequent type of infections spread in the health care delivery setting, and b) the practical aspects of diagnosis and therapy are more meaningful based on a combination of medical and financial considerations.

The report will provide a market analysis in the areas of Prevention, Testing and Treatment.

Market analysis in this report considers primarily the epidemiological considerations and the size patient groups both in the United States and globally, where available. We have accumulated the most recent data available, understanding that virtually no organization does extensive studies on these applications on a regular basis.

Many studies are highly localized and may only apply to a community, state or country (more often countries that are not a part of the major markets for nosocomial diagnostic

and therapeutic products). In many instances, we have had to draw from broader epidemiologic data, that is, on data that reach outside of the hospital and primary care environment in order to construct a picture of the infection prevention, testing and treatment needs.

In looking at infections in the health environment, we consider the diagnostic and therapeutic technologies that are currently available and attempt to project trends for preventing, detecting and treating these infections. To some extent, we are limited by the activity of the industries associated with the activities mentioned above for these infections. For the most part, these activities are limited and the advanced technologies seen in other areas of medical application are not necessarily present in terms of microbiology.

The majority of competitive participation for Hospital-Acquired Infection control and is in the United States and Europe. However, competition is steadily escalating in the United States and Europe, which is encouraging more participation in other areas such as Asia and Latin America. Companies in this report include:

Advanced Sterilization Products

Becton Dickinson

Belimed AG

bioMerieux

Cantel

Cepheid

Kimberly-Clark

Merck & Co.

Nordion

Pfizer

Roche

Steris

TSO3

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LIST OF MAJOR PROVIDERS

About

Gastroenteritis

Gastroenteritis is a condition that causes irritation and inflammation of the stomach and intestines of the gastrointestinal tract. Diarrhea, crampy abdominal pain, nausea, and vomiting are the most common symptoms. Viral infection is the most common cause of gastroenteritis but bacteria, parasites, and food-borne illness (such as shellfish) can be the offending agent. Nosocomial gastroenteritis can be caused by bacteria or viruses (most frequently, viruses).

Bacterial causes of gastro enteritis include infection with:

Staphylococcus aureus

E. coli

Salmonella

Shigella

Campylobacter

C. difficile

Classifications of Antibacterial Products

Several classifications of antibacterials are available for treating infections:

Carbapenems

Cephalosporins

Macrolides

Penicillins

Quinolones

Sulfonamides

Tetracyclines

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