

## Drug and Device Combination (2009 - 2014)

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### Abstracts

Drug device combination is defined as the combination of drugs and medical devices that can be chemically or physically united or co-packaged as separate, cross labeled products. The commercialization cycle from R&D to product shows the immense potential of bundled offering. Currently, the market has a potential of US\$10.6 billion and has been experiencing a growth of 15% CAGR for past two years. In the next five years, the market is expected to grow at a CAGR of 11.8%.

Untapped market potential and benefits are the primary factors for the early adoption. The other market factors contributing are relatively shortened product approval time with the establishment of Office of Combination Products (OCP) within the FDA. An increase in the number of cardiovascular patient population has also facilitated the early acceptance of the drug device combination products. This is supported by the fact that cardiovascular applications constitute about 64% of the entire drug-device combination applications market. A future view of the drug-device combination is that these next generation products will make single component medical devices obsolete.

Europe and the U.S. hold major share of the global drug-device combination market. The growth of the market in these countries is driven by growing ageing population and improvements in medical science and biotechnology that enables new product development. The emerging economies such as the BRIC (Brazil, Russia, India, China) nations also represent a high growth potential in this developing market.

### Market estimates and forecast

The report provides in-depth market estimates and forecasts for the global drug device combination market. The segmentation is as follows:

Drug device combination – products

Antimicrobial catheter, advanced wound care products, bone graft substitutes, antibiotic bone cements, drug eluting stents, photodynamic therapy, closed loop glucose monitor and insulin pump, steroid eluting electrodes and others.

Drug device combination – application

Bone treatment, cancer treatment, diabetes treatment, skin care treatment, antimicrobial applications, urological treatment, non cardiovascular treatment, cardiovascular treatment, ophthalmic treatment, others.

Drug device combination – technology

Bone graft substitutes.

Each section will provide market data, market drivers, trends and opportunities, top-selling products, key players, and competitive outlook. This report will also provide more than 100 market tables for various geographic regions covering the sub-segments and micro-markets. In addition, the report also provides 50 company profiles for each of its sub-segments.

### **What makes our reports unique?**

- We provide the longest market segmentation chain in this industry- not many reports provide market breakdown upto level 5.
- Each report is about 250 pages with 100+ market data tables, 40 competitive company profiles, analysis of 300 patents and a minimum of 50 micro markets, which are collectively exhaustive and mutually exclusive.
- No single report by any other publisher provides market data for all the segments viz products, services, applications, ingredients, technology, and stakeholders in a single report for all the four geographies - US, Europe, APAC, ROW.
- We provide 10% customization. Normally it is seen that clients do not find specific market intelligence that they are looking for. Our customization will ensure that you necessarily get the market intelligence you are looking for and we get a loyal customer.
- 15 pages of high level analysis including benchmarking strategies, best practices and

the market's cash cows (BCG matrix). We conduct detailed market positioning, product positioning and competitive positioning. Entry strategies, gaps and opportunities are identified for all the stakeholders.

- Comprehensive market analysis for the following sectors:

Pharmaceuticals, Medical Devices, Biotechnology, Semiconductor and Electronics, Energy and Power Supplies, Food and Beverages, Chemicals, Advanced Materials, Industrial Automation, and Telecom and IT. We also analyze retailers and super-retailers, technology providers, and research and development (R&D) companies.

Key questions answered

- Which are the high-growth segments/cash cows and how is the market segmented in terms of applications, products, services, ingredients, technologies, and stakeholders?
- What are market estimates and forecasts; which markets are doing well and which are not?
- Where are the gaps and opportunities; what is driving the market?
- Which are the key playing fields? Which are the winning edge imperatives?
- How is the competitive outlook; who are the main players in each of the segments; what are the key selling products; what are their strategic directives, operational strengths and product pipelines? Who is doing what?

## **Powerful Research and analysis**

The analysts working with MarketsandMarkets come from renowned publishers and market research firms, globally, adding their expertise and domain understanding. We get the facts from over 22,000 news and information sources, a huge database of key industry participants and draw on our relationships with more than 900 market research companies across the world. We, at MarketsandMarkets, are inspired to help our clients grow by providing qualitative business insights with our huge market intelligence repository.

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##### 5.4.3.1. Drivers

- 5.4.3.1.1. Deep prosthetics infections reduced to 1.6% from 6%
- 5.4.3.1.2. Obesity increasing the demand for joint arthroplasty
- 5.4.3.1.3. Improved accuracy gives confidence to its application

##### 5.4.3.2. Restraints

- 5.4.3.2.1. Rising necessity of revision surgeries

#### 5.4.4. SPINE FUSION

### 5.5. ANTIMICROBIAL APPLICATIONS

#### 5.5.1. DRIVERS

- 5.5.1.1. Application is increasing over time
- 5.5.1.2. Rising number of diabetic patients
- 5.5.1.3. Infection prevention leads to faster recovery
- 5.5.1.4. Reduced expenditure incurred by hospitals

#### 5.5.2. RESTRAINTS

- 5.5.2.1. Lack of resources in urban safety-net hospitals
- 5.5.2.2. Developing countries have not adopted these treatments

#### 5.5.3. WOUND CARE

##### 5.5.3.1. Drivers

- 5.5.3.1.1. Several factors giving boost to the market
- 5.5.3.1.2. Slowing down in demand is not possible

##### 5.5.3.2. Restraints

#### 5.5.4. SKIN SUBSTITUTES

##### 5.5.4.1. Drivers

- 5.5.4.1.1. Infection risk is eliminated
- 5.5.4.1.2. Faster healing reduces period of convalescence

##### 5.5.4.2. Restraints

- 5.5.4.2.1. Reimbursement issue is a restraining factor

### 5.6. CANCER TREATMENT

#### 5.6.1. DRIVERS

- 5.6.1.1. Increase in the number of cancer patients
- 5.6.1.2. Treatment using PDT is non invasive and patient friendly
- 5.6.1.3. Risks associated with the treatment is minimal
- 5.6.1.4. Treatment without risk of side effects

#### 5.6.2. RESTRAINTS

- 5.6.2.1. Limited applications
- 5.6.2.2. Possibility of inadequate number of health care professionals
- 5.6.2.3. New pharmaceutical inventions

#### 5.6.3. BARRETT'S ESOPHAGUS

- 5.6.3.1. Drivers
  - 5.6.3.1.1. Increasing prevalence of the disease
  - 5.6.3.1.2. Several advantages of the treatment
- 5.6.3.2. Restraints
  - 5.6.3.2.1. Improved efficiency of the treatment

#### 5.6.4. SKIN CANCER

- 5.6.4.1. Drivers
  - 5.6.4.1.1. Increased diagnosis of skin cancer cases will give a boost to the market
  - 5.6.4.1.2. Broadening variety of cancer patients
  - 5.6.4.1.3. Prevalence of such cancer in developed countries
  - 5.6.4.1.4. Application not limited to one disease
- 5.6.4.2. Restraints
  - 5.6.4.2.1. Phototoxicity
  - 5.6.4.2.2. Limited market potential

#### 5.6.5. HEAD AND NECK CANCER

- 5.6.5.1. Drivers
  - 5.6.5.1.1. Preferred treatment in certain cases
  - 5.6.5.1.2. Less risk of long term infections
- 5.6.5.2. Restraints
  - 5.6.5.2.1. Patients revert to conventional treatments if cancer relapses
  - 5.6.5.2.2. Low success rate due to co morbidity

### 5.7. SKIN CARE/TREATMENT

#### 5.7.1. DRIVERS

- 5.7.1.1. Increasing demand for skin care therapy
- 5.7.1.2. Treatment is done at the inner dermis layer

#### 5.7.2. RESTRAINTS

- 5.7.2.1. Loyal customers of cosmetic companies
- 5.7.2.2. Limited marketing activities for PDT

#### 5.7.3. OPPORTUNITIES



- 5.7.3.1. Improved marketing activities
- 5.7.3.2. Untapped potential in developing countries

#### 5.7.4. ACTINIC KERATOSES

- 5.7.4.1. Drivers
  - 5.7.4.1.1. High demand in the U.S. and Australia
  - 5.7.4.1.2. Enhanced treatment
  - 5.7.4.1.3. Elimination of risk of skin cancer
  - 5.7.4.1.4. Added advantage of cosmetic enhancement
- 5.7.4.2. Restraints
  - 5.7.4.2.1. Demand is not global
  - 5.7.4.2.2. Repeated procedures make the patients photosensitive

#### 5.7.5. PHOTOREJUVENATION

### 5.8. OPHTHALMIC TREATMENT

#### 5.8.1. DRIVERS

- 5.8.1.1. Increased demand from the ageing population
- 5.8.1.2. Offers physical and economical advantages

#### 5.8.2. RESTRAINTS

- 5.8.2.1. Repeated treatments required

#### 5.8.3. PATHOLOGIC MYOPIA

- 5.8.3.1. Drivers
  - 5.8.3.1.1. One of the leading causes of blindness in people of certain races
  - 5.8.3.1.2. Photodynamic therapy is an alternative option
  - 5.8.3.1.3. Increased preference by sportspersons
- 5.8.3.2. Restraints
  - 5.8.3.2.1. Repetition of procedures will add to the cost
  - 5.8.3.2.2. Preference of contact lenses over PDT

#### 5.8.4. AGE RELATED MACULAR DEGENERATION

- 5.8.4.1. Drivers
  - 5.8.4.1.1. Age related macular degeneration has the potential of becoming a national health issue
  - 5.8.4.1.2. Non invasive nature leads to no pain and inconvenience
  - 5.8.4.1.3. No damage to the retina
- 5.8.4.2. Restraints
  - 5.8.4.2.1. Success restricted by certain factors
  - 5.8.4.2.2. Non recovery of normal 6/6 vision

#### 5.8.5. PRESUMED OCULAR HISTOPLASMOSIS

### 5.9. DIABETES TREATMENT

### 5.9.1. DRIVERS

- 5.9.1.1. Increasing number of diabetes patients
- 5.9.1.2. Potential in middle income countries
- 5.9.1.3. New generation treatments effective in diabetic patients

### 5.9.2. RESTRAINTS

- 5.9.2.1. Possible restraining factors in future
- 5.9.2.2. Limited opportunity in Africa

### 5.9.3. OPPORTUNITIES

- 5.9.3.1. Obesity and increasing age of people
- 5.9.3.2. Development in technologies will reduce the cost

## **6. DRUG-DEVICE COMBINATION MARKET BY TECHNOLOGY**

### 6.1. SYNTHETIC BONE GRAFT SUBSTITUTES

#### 6.1.1. DRIVERS

- 6.1.1.1. Availability of several types enables customized usage
- 6.1.1.2. Surgeons have several options
- 6.1.1.3. Applicable in load bearing body parts
- 6.1.1.4. Foreign substance eliminated from the body
- 6.1.1.5. Increased applications

#### 6.1.2. RESTRAINTS

- 6.1.2.1. Do not possess ideal properties
- 6.1.2.2. Possible stunted growth in future

### 6.2. DEMINERALIZED BONE MATRIX

#### 6.2.1. DRIVER

- 6.2.1.1. Easy to understand technology
- 6.2.1.2. Applicable for different types of bone defects
- 6.2.1.3. Growing number of aged people

#### 6.2.2. RESTRAINTS

- 6.2.2.1. Lack of osteoinductive properties
- 6.2.2.2. Competition from other procedures

### 6.3. BONE MORPHOGENIC PROTEINS

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- 8.2. SMITH & NEPHEW PLC
- 8.3. ANGIOTECH PHARMACEUTICALS, INC
- 8.4. 3M
- 8.5. ABBOTT LABORATORIES
- 8.6. ACRYMED
- 8.7. ALLOSOURCE
- 8.8. LIFECELL CORP
- 8.9. NUCRYST PHARMACEUTICALS, INC
- 8.10. ORBUSNEICH CO., LTD
- 8.11. ORGANOGENESIS, INC
- 8.12. OSTEOTECH, INC
- 8.13. FORTICELL BIOSCIENCE, INC
- 8.14. SPIRE BIOMEDICAL INC
- 8.15. ST. JUDE MEDICAL INC
- 8.16. AGION TECHNOLOGIES, INC
- 8.17. APATECH
- 8.18. BIOMET ORTHOPEDICS, INC
- 8.19. BIOSENSORS
- 8.20. BIOTRONIK
- 8.21. C.R. BARD, INC
- 8.22. KIADIS PHARMA B.V
- 8.23. CORIN
- 8.24. COVALON
- 8.25. COVIDIEN LTD
- 8.26. DUSA PHARMACEUTICALS, INC.
- 8.27. DEPUY ORTHOPAEDICS INC
- 8.28. EDWARDS LIFESCIENCES CORP
- 8.29. ETEX
- 8.30. ETHICON, INC.
- 8.31. EXACTECH INC.
- 8.32. STRYKER CORPORATION
- 8.33. DAVOL INC.
- 8.34. SUNGWON MEDICAL CO., LTD
- 8.35. TEI BIOSCIENCES, INC.
- 8.36. VYGON S.A
- 8.37. W.L. GORE & ASSOCIATES INC.

- 8.38. WRIGHT MEDICAL GROUP, INC.
- 8.39. XTENT
- 8.40. COLLAGEN MATRIX, INC.
- 8.41. COOK CRITICAL CARE, INC.
- 8.42. ARROW INTERNATIONAL
- 8.43. BIOMETRIX MEDICAL
- 8.44. ZIMMER HOLDING, INC.
- 8.45. MEDTRONIC, INC.
- 8.46. QLT INC.
- 8.47. COOK MEDICAL
- 8.48. BOSTON SCIENTIFIC CORPORATION
- 8.49. ATRIUM MEDICAL CORPORATION
- 8.50. CORDIS CORPORATION
- 8.51. SYNTHES, INC.

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