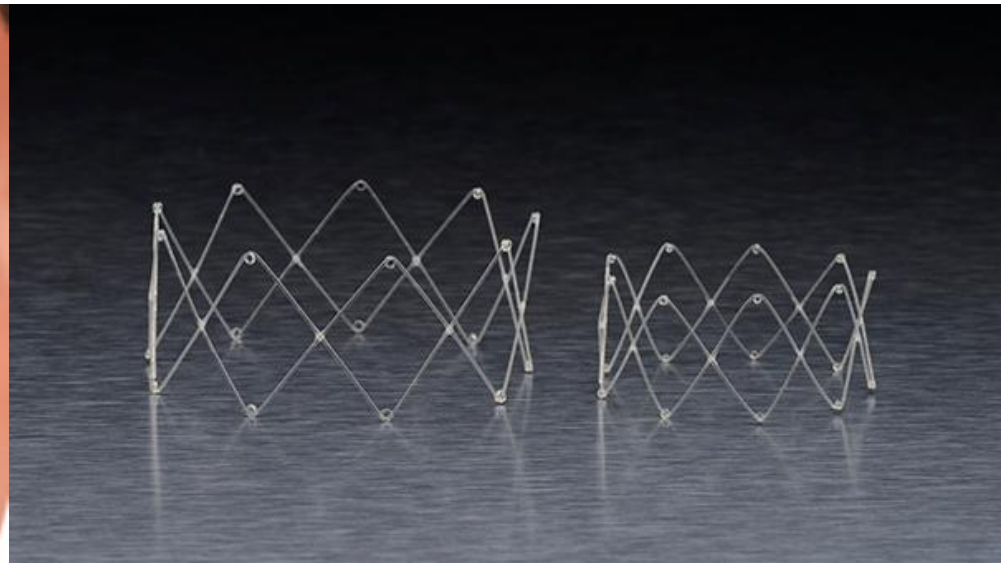
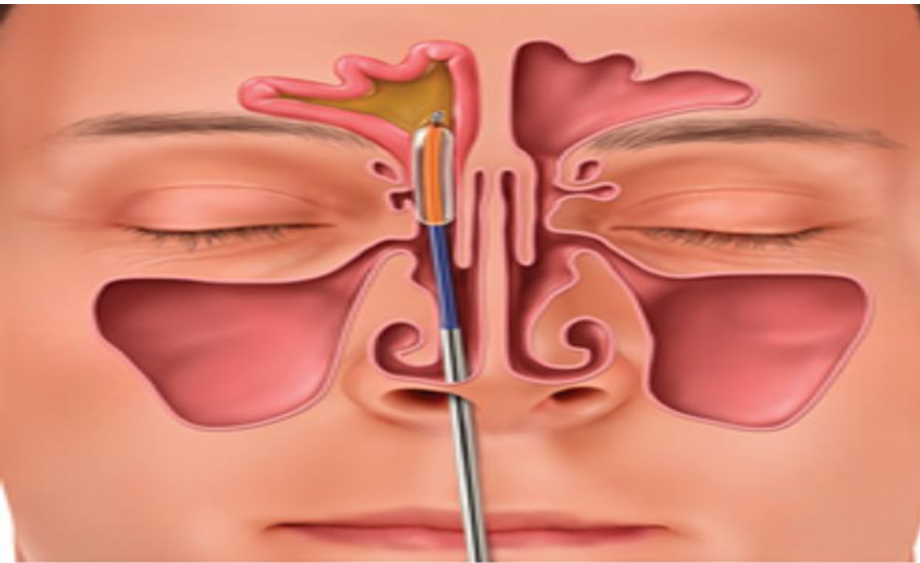


# US Drug Eluting Sinus Stent (DESS) Market: Size, Trends & Forecasts (2016-2021)

September 2016



# US Drug Eluting Sinus Stent Market Report

## Scope of the Report

The report entitled "US Drug Eluting Sinus Stent (DESS) Market: Size, Trends & Forecasts (2016-2021)", provides analysis of the US DESS market, with detailed analysis of market size and growth, penetration, market share and economic impact of the industry. The analysis includes the market by value (TAM), by volume and by utilization. The report also provides the analysis of the US sinus surgery market, including analysis of FESS market and BSD market.

Furthermore, the report also assesses the key opportunities in the market and outlines the factors that are and will be driving the growth of the industry. Growth of the overall US DESS market has also been forecasted for the years 2016-2021, taking into consideration the growth pattern of sinus surgery market, the growth drivers and the current and future trends.

Intersect is the only company manufacturing drug eluting sinus stents, but the competitive landscape of the market includes other indirect competitors, such as Medtronic, Entellus Medical and Acclarent (J&J), whose company profiling has been done in the report. In this segment of the report, business overview, financial overview and business strategies of the companies are provided.

## Company Coverage

Intersect ENT

Medtronic (Xomed)

Entellus Medical

Acclarent (J&J)

# US Drug Eluting Sinus Stent Market Report

## Executive Summary

Sinuses are the hollow cavities located in the bones of the face and around the nose. There are four sinus cavities: frontal, maxillary, ethmoid, and sphenoid, each with different features. Under normal conditions, the secretion (mucous) flow through the nasal passages, but with the onset of sinusitis, the secretion gets blocked in the sinuses due to inflammation. Sinusitis disturbs the normal lifestyle of a person and sometimes become frustrating, as it affects the person's breathing, sleeping and eating.

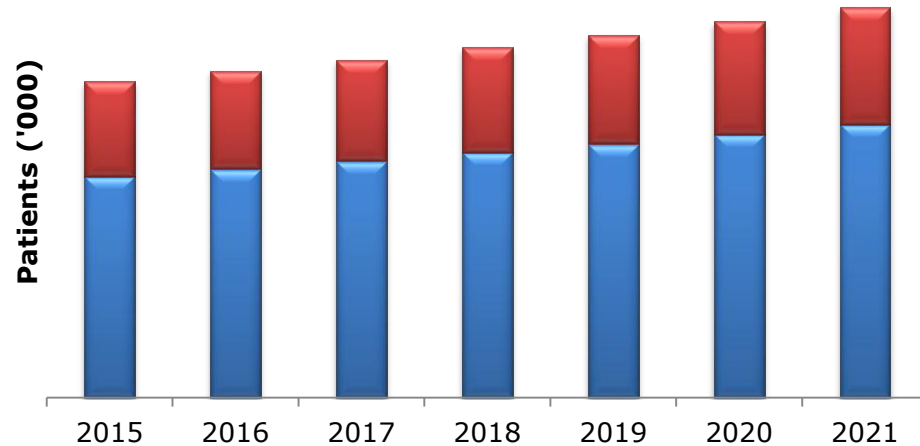
Sinusitis can be divided into Acute Sinusitis, Recurrent Acute Rhinosinusitis (RARS) and chronic Rhinosinusitis (CRS), on the basis of the duration of the episode of sinusitis and its severity. The treatment options for the sinusitis can be over-the-counter treatment, medical management and surgery. The OTC treatment includes decongestants, antihistamines, pain relievers and nasal irrigation. Medical management includes antibiotics and oral and nasal steroids. The sinus surgeries are mainly of two types: Functional Endoscopic Sinus Surgery (FESS) and Balloon Sinus Dilation (BSD).

Intersect, is the only company that has developed drug releasing bio-absorbable implants (drug eluting sinus stents- DESS) that enable targeted and sustained release of therapeutic agents, increasing the effectiveness of the sinus surgery.

The US DESS market is expected to increase at a significant growth rate during the forecasted period (2016-2021). The US DESS market is supported by various growth drivers, such as limitations of FESS treatment, benefits of DESS, increasing per capita healthcare expenditure, cost effectiveness of DESS, etc. Yet, the market faces certain challenges, such as, reimbursement issues, dependability on individual physician's experience, limited trials after BSD, etc.

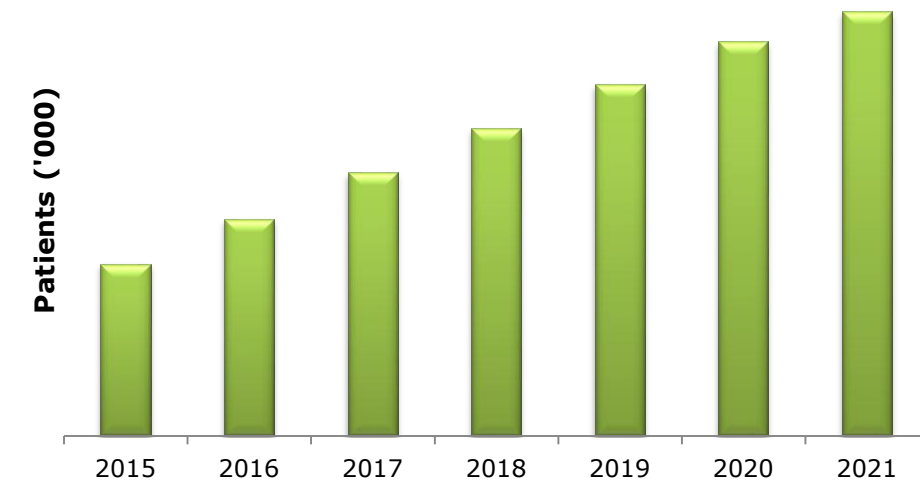
# US Sinus Surgery Market Overview

**US Sinus Surgery Market by Patient Segmentation; 2015-2021 ('000)**

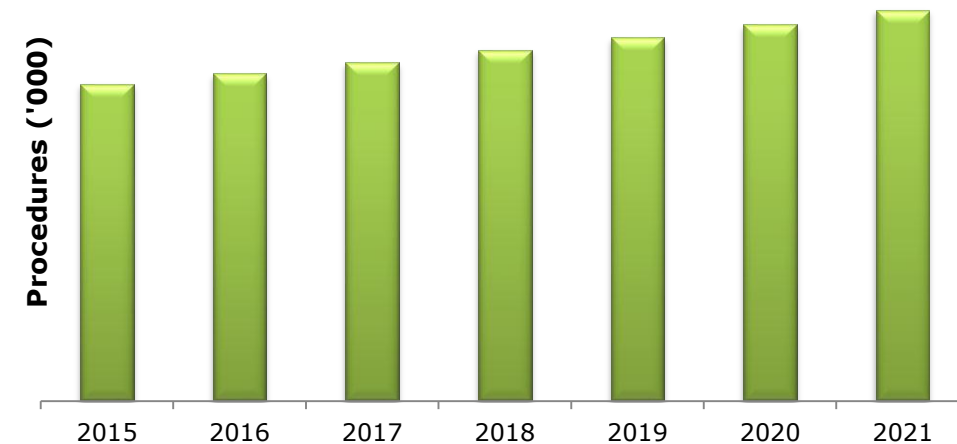


The number of sinusitis patients is expected to increase at a CAGR of ...% over the years 2016-2021. The number of sinusitis patients were ... thousand in 2015, which is estimated to increase to ... thousand in 2021. Out of total ... thousand ENT eligible patients in 2015, ... thousand patients were treated from medical management and rest from surgery. The total number of sinus surgery procedures have increased to ... thousand and is expected to ...

**US Sinus Surgery Market by Number of Sinus Patients; 2015-2021 ('000)**

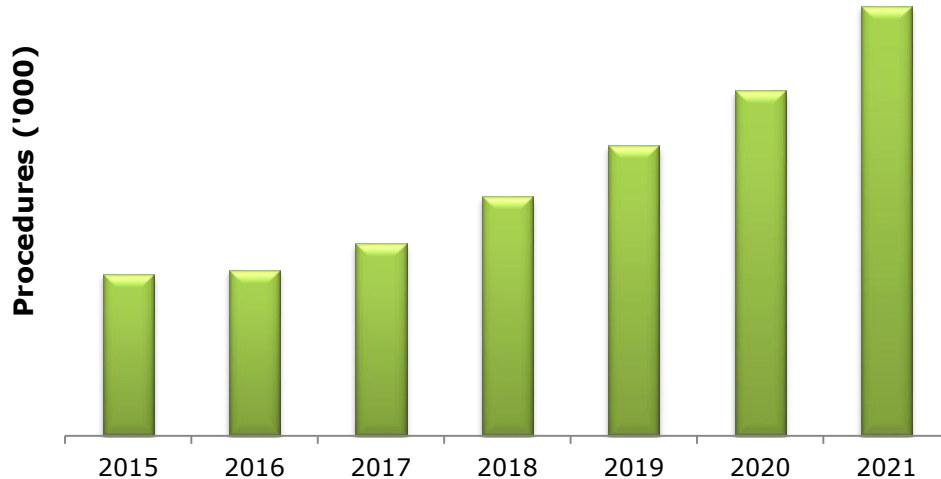


**US Sinus Surgery Market by Number of Procedures; 2015-2021 ('000)**

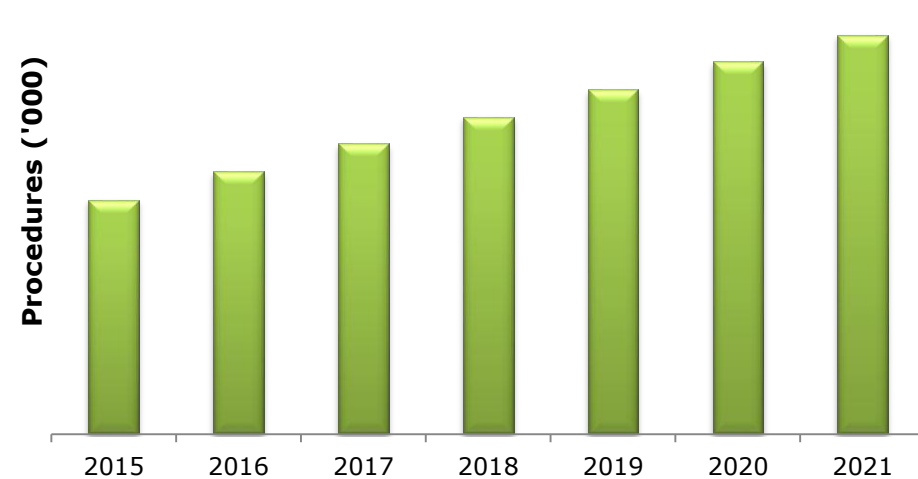


# US Sinus Surgery Market Segments Overview

US FESS Market by Number of Procedures ;  
2015-2021 ('000)



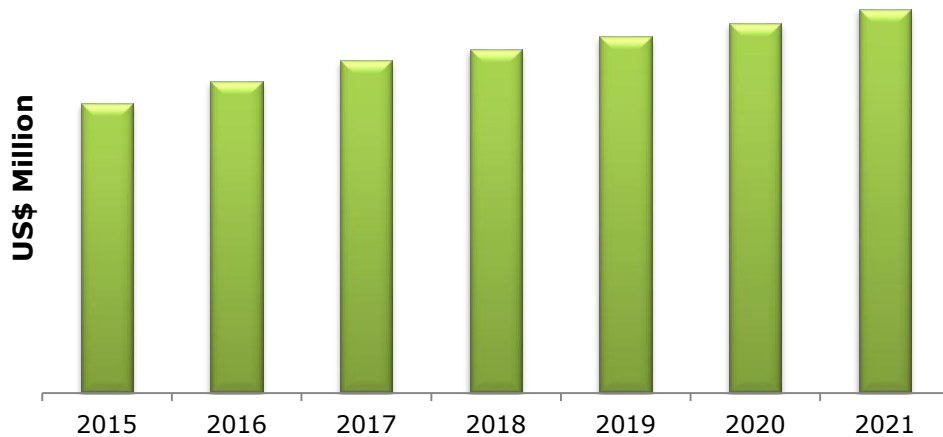
US BSD Market by Number of Procedures;  
2015-2021 ('000)



The number of FESS procedures was .... thousand in 2015. The FESS procedures are expected to increase at a CAGR of ...% over the years 2016-2021, to reach ... thousand in 2021. The number of procedures for balloon sinus dilation was .... thousand in 2015. The number of BSD procedure is expected to increase at a CAGR of ...% over the years 2016-2021 to reach .... thousand in 2021.

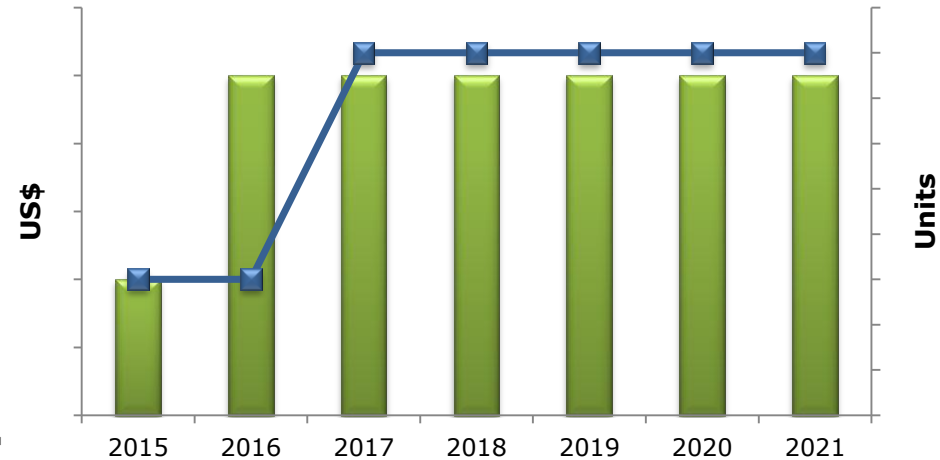
# US Drug Eluting Sinus Stent (DESS) Market Overview

**US DESS Market by TAM; 2015-2021  
(US\$ Million)**



The total addressable market for drug eluting sinus stent (DESS) market was US\$.... million in 2015, assuming that ..... The total addressable market is expected to increase to US\$... in 2021,... .... implants per procedure were utilized in 2015, increasing (expected) to ... by 2017 with ..... The ASP of the DESS was US\$... in 2015 and is expected to increase to US\$... in 2016. the number of PROPEL units sold were ... in 2015 and number of procedures in which PROPEL was used were ...

**US DESS Market by ASP and Utilization;  
2015-2021**



**US PROPEL Market by Units Sold and  
Number of Procedure ; 2015-2018**

