



TSM Product Information

November 2025

Table of Contents

-  1 [.....Pressure Infusion Bags](#)
-  2 [.....Leadwires](#)
-  3 [.....Capnography \(EtCO₂\)](#)
-  4 [.....Anesthesia Circuits and Masks](#)
-  5 [.....SuperNO₂VA[®] Et](#)
-  6 [.....AirLife DuoTherm[®]](#)
- 7 [.....Humidification \(Sterile Water & Saline\)](#)
- 8 [.....Non-Invasive Ventilation](#)
- 9 [.....Airways](#)

- 10 [.....Laryngoscopes](#)
- 11 [.....Closed Suction](#)
- 12 [.....Ballard[®] Oral Care](#)
- 13 [.....Medication Delivery](#)
- 14 [.....Oxygen Delivery](#)
- 15 [.....Resuscitation / Hyperinflation](#)
- 16 [.....HME - HMEF](#)
- 17 [.....Bronchial Hygiene](#)
- 18 [.....Intubation Aids](#)

 **Focus Products**



Pressure Infusion Bags

INTERNAL USE ONLY

Pressure Infusion Bags

What is in an intravenous fluid (IV) bag?

The IV bag contains fluids (blood, medications or nutrients) and connects via IV to patient.

- IV fluids normally drip into the IV line at slow rate.

What is the purpose of a Pressure Infusion Bag (PIB)?

A PIB is mainly used when a critically ill or injured patient requires rapid administration of products because of an emergency, such as low blood pressure, dehydration, or

- Area of use: emergency rooms, trauma units, surgical suites, post-anesthesia units and emergency medical services.

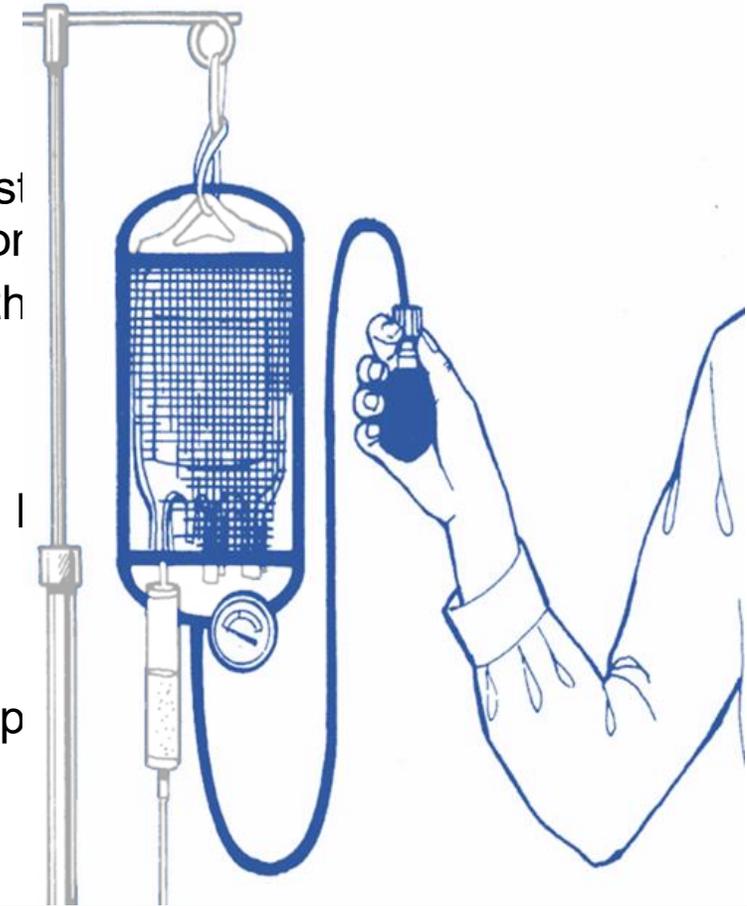
How is a PIB used?

PIBs are used to slip over an IV fluid bag allowing pressure to be applied to the IV

- A PIB has an inflatable sleeve which is placed around an IV bag.

When the device is inflated, it assists in the infusion of fluid

- The IV fluids or blood products can be given much more rapidly when a p



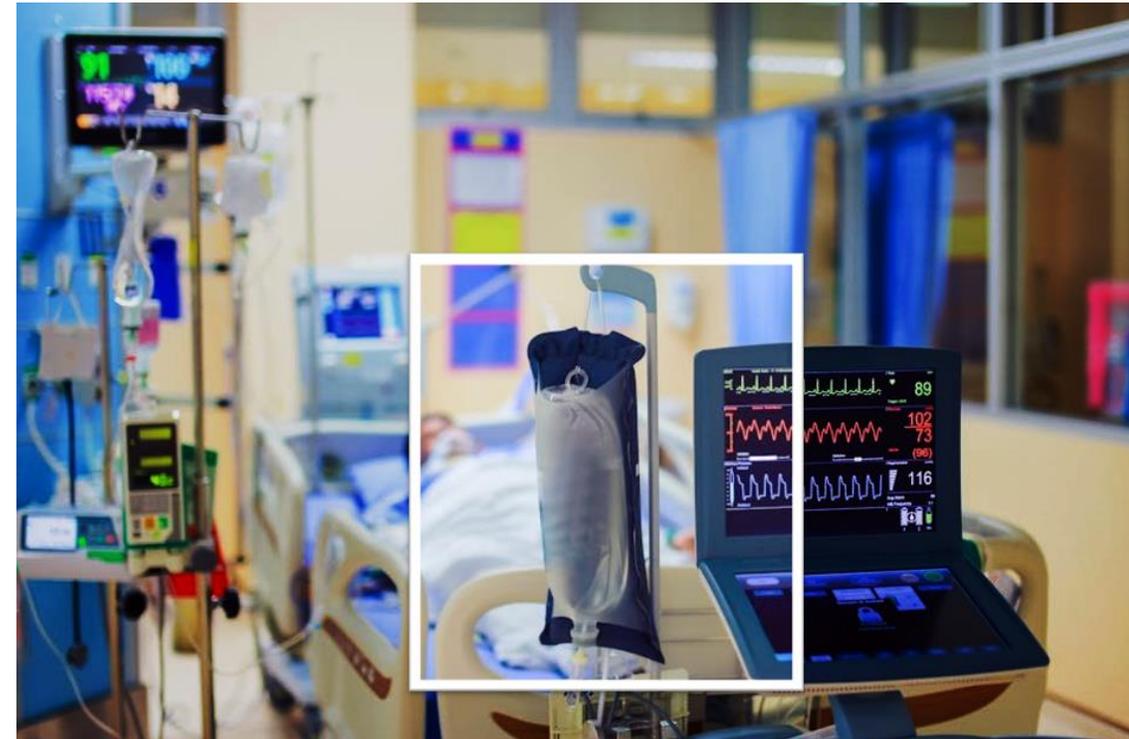


1. Rapid Infusion

- In critical situations like significant blood loss or shock, a rapid infusion of blood or IV fluids is crucial to stabilize a patient's condition and prevent complications

2. Invasive Pressure Monitoring

- PIBs are a standard component of arterial pressure monitoring and other invasive procedures. The pressurized solution from the IV bag keeps the catheter patent by preventing blood from flowing back into the tubing.



Pressure Infusion Bag - Considerations



Bladder Design:

- Material
- Fit around fluid bags

- Consistent flow rate of fluid
- Complete fluid disbursement
- Pressure maintenance

Sleeve/Back Style:

- Clear vs. Mesh

- Visibility to fluid bag and contents
- Cleaning/Disinfecting after fluid exposure

Pressure Gauge:

- Easy identification of pressure reading
- Pressure relief valve

- Overinflation risks/advantages
- MRI compatibility

Air Direction Mechanism:

- Stopcock vs. Thumbwheel

- Single-handed inflation/deflation
- Proper seal preventing leakage

Inflation Bulb:

- How many pumps to inflate to target pressure?

- Speed to inflation
- Ease of use

AirLife Branded Product Portfolio

<p>MR</p> <p>Ethox</p> <p>Infu-Surg Infu-Surg Clarity*</p>  <p><i>*Disposable only</i></p>	<p>MR</p> <p>Salter Labs</p> <p>EU-MDR ✓</p> <p>InfuseIT InfuseIT Reusable*</p>  <p><i>*Clear back only</i></p>	<p>MR</p> <p>EU-MDR ✓</p> <p>Vital Signs</p>  <p><i>Mesh back only</i></p>
<p>375mmHg Pop-Off</p>		<p>No Pop-Off</p>

AirLife Portfolio



Brand Names	Infu-Surg® & Infu-Surg® Clarity	InfuseIT®	Vital Signs™
Item Numbers	4050, 4100, 4030H, 950089904, 950194210, 950194310	ZIT-500-10, ZIT1000-10, ZIT-3000-10, ZIT-520-5, ZIT-1020-5	IN800012, IN800020, IN800048, IN900012, IN900048, IN950012
Reusability	Single-Patient Use Only	Single-Patient Use & Reusable Options Available	Single-Patient Use Only
Back Style	Mesh and Clear Options Available	Clear	Mesh
Sizes	500mL/1000mL/3000mL <i>Clarity = 500mL/1000mL</i>	500mL/1000mL/3000mL <i>Reusable = 500mL/1000mL</i>	500mL/1000mL/3000mL
Pressure Relief Valve	375mmHg	360mmHg-400mmHg	No
MR Conditional Claim	Yes	Yes	No
Color-Coding Sizing	Yes	No	Yes
Single-handed Inflation/Deflation	Yes	Yes	No
Make vs. Buy	Make	Make	Buy
ASP/Each (1000mL)	\$6.62	\$7.45	\$7.69

Item Attributes

Item #	Brand	Reusability	Back Style	Size	Air Direction Mechanism	Pressure Relief Valve	MR Compatibility Claim	Packaging
ZIT-1020-5	InfuselT®	Reusable	Clear	1000mL	3-way Stopcock	360-400mmHg	Yes	5 EA/CA
ZIT-520-5	InfuselT®	Reusable	Clear	500mL	3-way Stopcock	360-400mmHg	Yes	5 EA/CA
ZIT-1000-10	InfuselT®	Single-Patient Use	Clear	1000mL	3-way Stopcock	360-400mmHg	Yes	10 EA/CA
ZIT-3000-10	InfuselT®	Single-Patient Use	Clear	3000mL	3-way Stopcock	360-400mmHg	Yes	10 EA/CA
ZIT-500-10	InfuselT®	Single-Patient Use	Clear	500mL	3-way Stopcock	360-400mmHg	Yes	10 EA/CA
950194310	Infu-Surg®	Single-Patient Use	Mesh	1000mL	3-way Stopcock	375mmHg	Yes	25 EA/CA
950089904	Infu-Surg®	Single-Patient Use	Mesh	3000mL	3-way Stopcock	375mmHg	Yes	5 EA/CA
4030H	Infu-Surg®	Single-Patient Use	Mesh	3000mL	3-way Stopcock	375mmHg	Yes	5 EA/CA
950194210	Infu-Surg®	Single-Patient Use	Mesh	500mL	3-way Stopcock	375mmHg	Yes	25 EA/CA
4100	Infu-Surg® Clarity	Single-Patient Use	Clear	1000mL	3-way Stopcock	375mmHg	Yes	25 EA/CA
4050	Infu-Surg® Clarity	Single-Patient Use	Clear	500mL	3-way Stopcock	375mmHg	Yes	25 EA/CA
IN800020	Vital Signs™	Single-Patient Use	Clear	500mL	3-way Stopcock	No	No	20 EA/CA
IN900012	Vital Signs™	Single-Patient Use	Mesh	1000mL	3-way Stopcock	No	No	12 EA/CA
IN900012-CE	Vital Signs™	Single-Patient Use	Mesh	1000mL	3-way Stopcock	No	No	12 EA/CA
IN900048	Vital Signs™	Single-Patient Use	Mesh	1000mL	3-way Stopcock	No	No	48 EA/CA
IN900048-CE	Vital Signs™	Single-Patient Use	Mesh	1000mL	3-way Stopcock	No	No	48 EA/CA
IN950012	Vital Signs™	Single-Patient Use	Mesh	3000mL	3-way Stopcock	No	No	12 EA/CA
IN950012-CE	Vital Signs™	Single-Patient Use	Mesh	3000mL	3-way Stopcock	No	No	12 EA/CA
IN800012	Vital Signs™	Single-Patient Use	Mesh	500mL	3-way Stopcock	No	No	12 EA/CA
IN800012-CE	Vital Signs™	Single-Patient Use	Mesh	500mL	3-way Stopcock	No	No	12 EA/CA
IN800048	Vital Signs™	Single-Patient Use	Mesh	500mL	3-way Stopcock	No	No	48 EA/CA
IN800048-CE	Vital Signs™	Single-Patient Use	Mesh	500mL	3-way Stopcock	No	No	48 EA/CA

Pressure Infusion Bag Instructions For Use (IFU)

medical Ethox™
3000 mL | INFU-SURG®
 Pressure Infusion Bag

INFLATE **MAINTAIN PRESSURE** **DEFLATE**



 Ethox Medical, LLC
 2710 Northridge Dr. NW, Suite A
 Grand Rapids, MI 49544 USA

 SunMed®
 Manufactured for Ethox Medical, LLC
 a Subsidiary of SunMed Holdings, LLC
 www.Sun-Med.com
 Made in China by SunMed AP, LTD

 Donawa Lifescience Consulting Srl
 Piazza Albania 10
 00153 Rome, Italy

4030H.0 Rev 3 2022/05



Ethox Pressure Infusion Bag Training Video – featuring Gary Banks



YouTube Link: <https://youtu.be/MfLslVeJg3I>

Instructions for Use: Pressure Infusion Bag



medical Ethox™ | INFU-SURG® + INFU-SURG® CLARITY

Range: 150-300 mmHg
 Pressure Relief: 375 mmHg
 Accuracy: +/- 15% FS

REF

APPLIES TO THESE ETHOX PRESSURE INFUSION BAGS

4005, 4005H, 4050 (500ml)
4010, 4010H, 4100 (1000ml)
4030, 4030H (3000ml)

1. Insert intravenous bag between mesh/panel and pressure bag.
2. Hang intravenous bag on mounted hook or slide hanger loop through top of IV bag if applicable.
3. Inflate: Close valve on inflation bulb. Pump inflation bulb until gauge indicates the proper pressure.
4. Rotate stopcock to "Maintain Pressure" position.
5. Deflate: Open valve on inflation bulb.

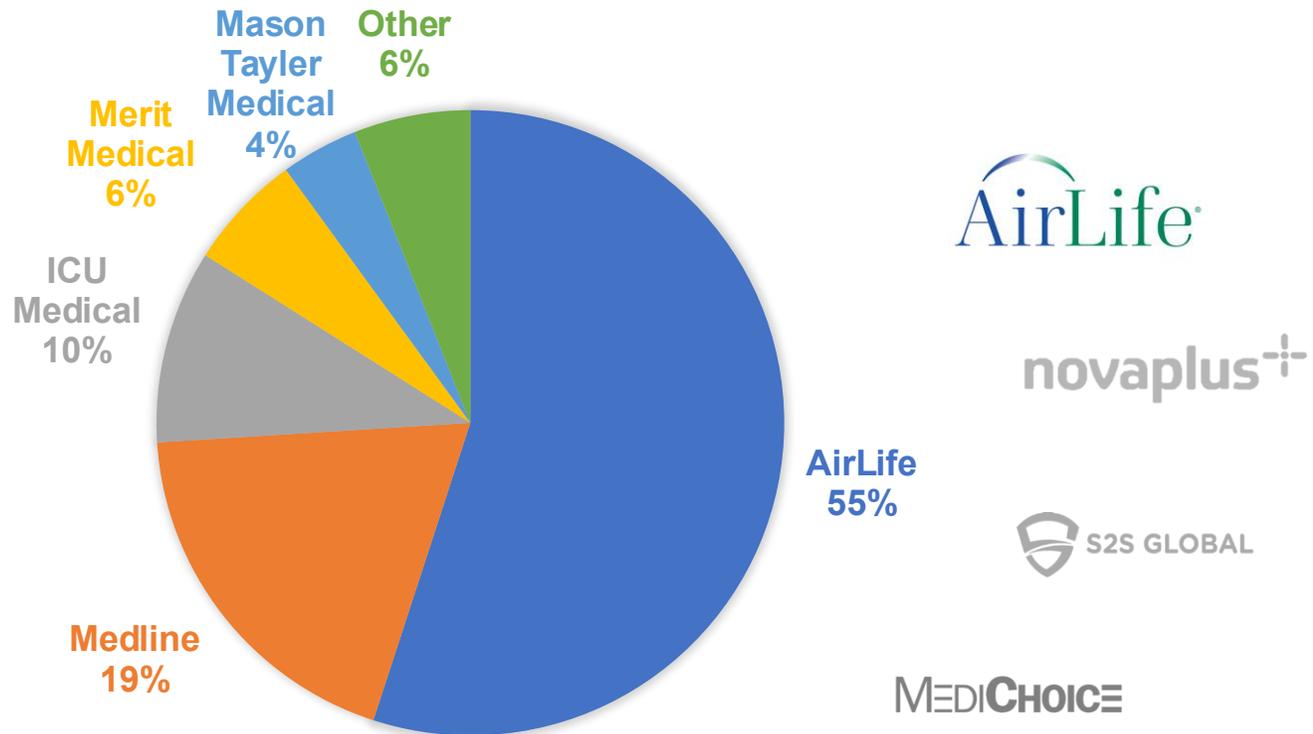
Caution: For best transfer of pressure to the IV Bag, ensure fluid bag is placed within the pressure infuser panel.

GPO Contracts

GPO	Contract Number	Effective Dates	Tier Structure	Brands
	MS4810	November 1 st , 2016 – October 31 st , 2026	Tier 1: Access TIER Tier 2: 80% Commitment	Infu-Surg® Infu-Surg® Clarity Novaplus®
	2543	March 1 st , 2024 – February 28 th , 2027	Tier 1: Access TIER	Infu-Surg® Infu-Surg® Clarity
	PP-NS-2017	September 1 st , 2024 – August 31 st , 2027	Tier 1: Access TIER Tier 2: \$10K to <\$40K, AHS Tier 3: >\$40K	InfuseIT® PremierPro™

Domestic Market Share

Clarivate Market Share (2022)



**\$20 million
in sales
in 2024**

Competitor Overview: Medline

2nd in the Market: 19% (per Clarivate)

Large salesforce with multiple contract capabilities

Custom kits (advertise unlimited possibilities)

Full distribution catalog and brand mix incentivization

- 3 Sizes:
 - 500 mL, 1000 mL, and 3000 mL
- Stopcock and Thumbwheel
- Mesh and Clear Panel Options
- Disposable and Reusable
- MR Safe (requires Monometer detachment)

Considerable compliance and marketing of PremierPro options

Efficient Performance. Reliable Results.



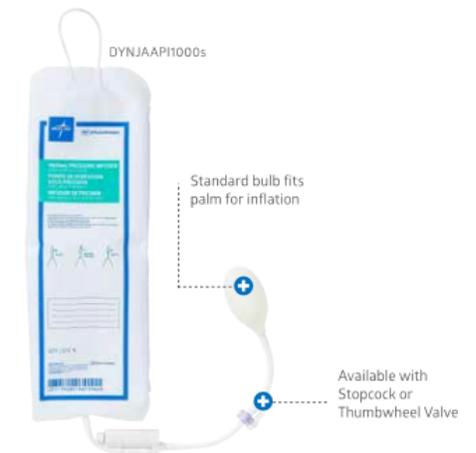
Our complete line of pressure infusers are designed to provide rapid fluid infusion to your patients. By using quality materials and robust construction, Medline can help ensure consistent pressure over time.

The Difference Is in the Details.

- » **Durable** – Strong mesh backing withstands heavy fluid load.
- » **Easy to Use** – Color-coded piston gauge provides quick feedback on pressure status.
- » **Visual Cues** – Clear images show each stopcock position, helping minimize errors.
- » **Disposable** – Individually packaged for single-patient use.
- » **Convenient** – Our built-in hook allows fluid bag exchange without having to remove the infusion bag from the IV pole.

Standard Bulb Pressure Infusers

Item No.	Description	Pkg
DYNJAAP1500S	500 ml, with Stopcock Valve	12/cs
DYNJAAP1000S	1,000 ml, with Stopcock Valve	12/cs
DYNJAAP13000S	3,000 ml, with Stopcock Valve	12/cs
DYNJAAP1500T	500 ml, with Thumbwheel Valve	12/cs
DYNJAAP1000T	1000 ml, with Thumbwheel Valve	12/cs
DYNJAAP13000T	3000 ml, with Thumbwheel Valve	12/cs



For a sample, contact your
Medline Representative today.

Competitor Overview: Merit Medical

- Own 6% of market share
- 2 Pressure Settings
 - Default setting from 0-300 mmHG
 - Over-Pressurization Option
 - Button on pressure gauge allows clinician to over-pressurize when needed (300-450 mmHG)
- 3 Sizes:
 - 500 mL, 1000 mL, and 3000 mL
- Primary selling point is Over Pressurization
 - Vital Signs PIB (no pressure relief valve/pop-off) provides over pressurization alternative



Merit Medical Pressure Infusion Bag



Two pressure settings available in 500ml, 1000ml, and 3000ml. Quickly and easily Sterile.

- STANDARD PRESSURE**
Valve is factory pre-set for pressurization up to 300mmHg.
- OVER PRESSURE**
Depress blue button to set valve for over-pressure mode allowing 300-400mmHg for rapid infusion.
- POLE HANGER**
Easy and stable placement onto IV pole.
- FLUID BAG HOOK**
Bag attaches easily to rigid hook which secures bag in the event of pressure loss.
- ONE-HANDED PREP**
Stopcock placed close to bulb for easy inflation, closure once fully pressurized, and deflation.

Description	Quantity
500ml Infuser Bag with Dual Pressure Valve	12 per box, 48 per case
1000ml Infuser Bag with Dual Pressure Valve	12 per box, 48 per case
3000ml Infuser Bag with Dual Pressure Valve	6 per box, 24 per case

PIB - Selling Strategy

Lead with Ethox First:

- Highest margin in AirLife's portfolio
- Most diversified product offering
- Contracted with all major GPOs

Leverage GPO Connections

- S2S Global = National, AscenDrive (sole-award), SURPASS (sole-award)
- Novaplus = Vizient contract access

AirLife Agreements (ALAs)

- Given the low clinical lift to convert these products, PIBs should be included in all ALAs



Clinical

- MR Compatibility without altering the device
- Pressure relief valve to prevent risks of over-pressurization
 - Fluid bag rupture
 - Blown catheter



Supply Chain

- Ability to standardize supplier base due to diverse product offering
- Potential savings opportunity
- Increase GPO contract compliance

Tip: When selling/supporting other product categories, always observe and question their current PIB supplier. It may be easier to gain a successful conversion when paired with other products. (Ex. Regard BP Cuffs)

Objection Handling



"I am happy with Medline being my supplier."

Unlike most other suppliers, we are the true manufacturer of our Infu-Surg PIBs. This allows us to have greater control in volatile situations protecting your organization. Through AirLife Secure, we can provide stability to your supply chain while also increasing your GPO contract compliance.



"I am happy with Merit Medical being my supplier."

Infu-Surg PIBs are available for purchase through most major medical distributors, preventing the need for additional orders through Merit Medical.

Infu-Surg PIBs provide safety (MR compatibility, pressure relief valve) paralleled with potential financial savings for your organization.



"I am happy with ICU Medical being my supplier."

Infu-Surg PIBs provide safety (MR compatibility, pressure relief valve) paralleled with potential financial savings for your organization.

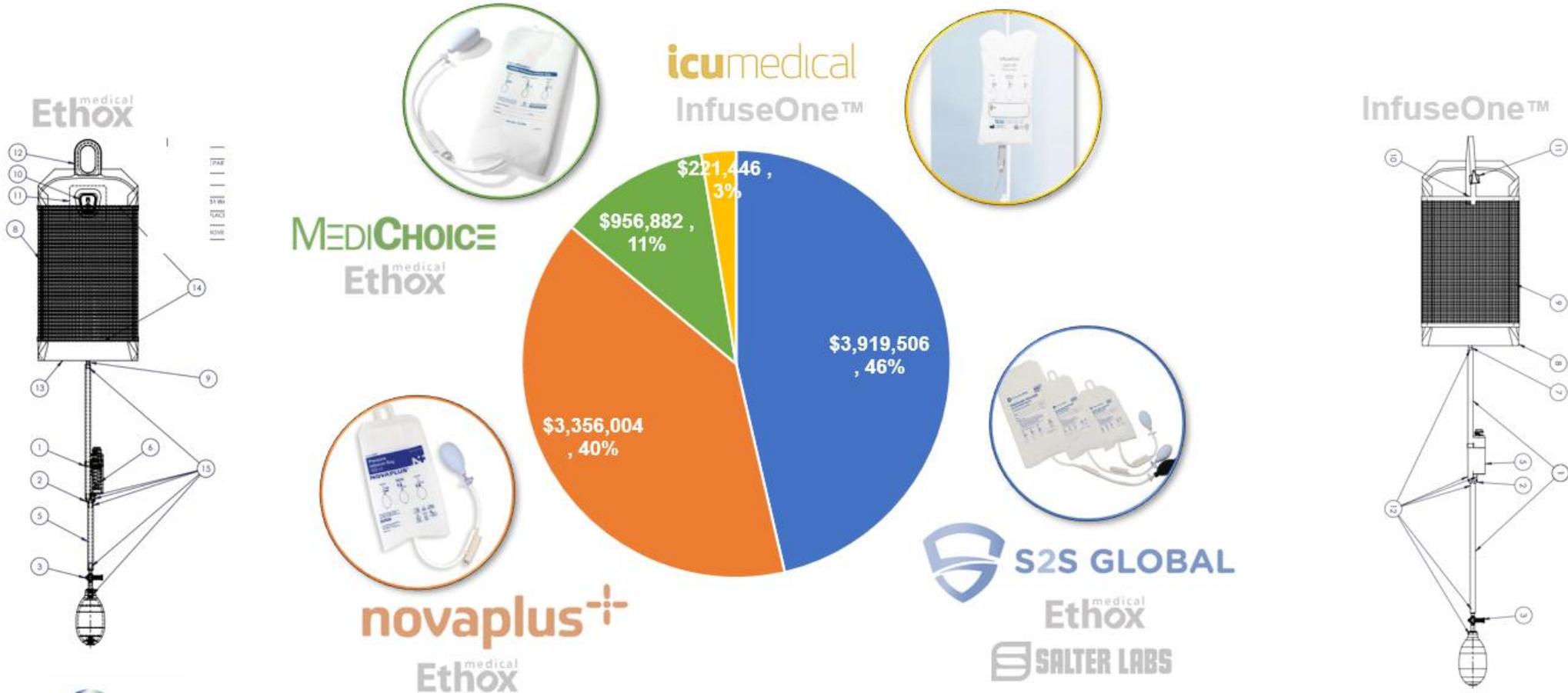


"Your PIBs are not staying inflated."

Infu-Surg PIBs were designed with safety and efficacy in mind. Our PIBs are equipped with a pressure relief valve that engages at 375mmHg to help mitigate potential adverse events including busted fluid bags and ruptured catheters, both of which could have serious implications for a patient.



Private Label Product Portfolio



PIB: Highest Volume SKUs

- 950194310 | ETHOX 4010H INFU-SURG, 1000ML PRESSURE INFUSER BAG AP
- 950194210 | ETHOX 4005H INFU-SURG, 500ML PRESSURE INFUSER BAG AP
- V4005H | NOVAPLUS 500ML MESH PRESSURE INFUSION BAG
- 8808 | PREMIERPRO 1000ML PRESSURE INFUSION BAG, MESH BACK
- V4010H | NOVAPLUS 1000ML MESH PRESSURE INFUSION BAG
- 8807 | PREMIERPRO 500ML PRESSURE INFUSION BAG, MESH BACK
- IN900012 | INFUSOR, PRESSURE, 1000 ML, NETTED
- IN800048 | INFUSOR, PRESSURE, 500 ML, NETTED, 48/CS
- 4050 | 500ML CLARITY PRESSURE INFUSION BAG

PIB: Questions to Ask

- Is there a need to consolidate vendors?
- Is there a possibility we can save money for you?
- Can we increase your contract compliance?

PIB: Key Selling Points

Excellent contract positions

Quality and consistent performance

Infuslt & InfuSurge, Novaplus & S2s are all MRI conditional

Some reusable bags (AirLife's) are only supposed to be used 50 times or less. Most don't have way to track.

YOU

*Prime Targets:

- Hospitals using off contract brands
- Sole source contract for Vizient (Nova+ 6% admin fees), HealthTrust (Ethox), Premier (S2S / AscenDrive & Surpass)

Resources:

[PIB Literature Sheets](#)

[PIB Training Video](#) (3:50)

AirLife™



Leadwires

INTERNAL USE ONLY

X2 Market Dynamics Overview

Total Market Size:

- **Total Addressable Market** **\$125M**
 - **Domestic** **\$115-120M**
 - **International** **\$5-10M**
- **Market Leaders**
 1. **Cardinal Health** **\$75M**
 2. **3M** **\$10-15M**
 3. **Stryker (Reprocessed)** **\$10.2M**
 4. **AirLife** **\$9.1M**

AirLife Market Share:

- **AirLife Market Share** **\$9.1M / 6%**
 - **Domestic** **\$8.8M / 6%**
 - **International** **\$0.3M / 6-12%**

Head Winds:

- *International market has little appetite for disposables*
- *Cardinal Health and 3M leverages with electrodes*
- *Cardinal Health was first to market, very entrenched*
- *Philips /Stryker reprocessed relationship offers lower-cost alternative*
- *ECG Monitoring is not an AirLife sales rep strength (yet)*
- *Brand new customers are a long sales cycle*
- *Chinese Tariffs would negatively impact costs*
- *Long lead times and difficult to sell to Government accounts*
- *Cables split between two different vendors*

Tail Winds:

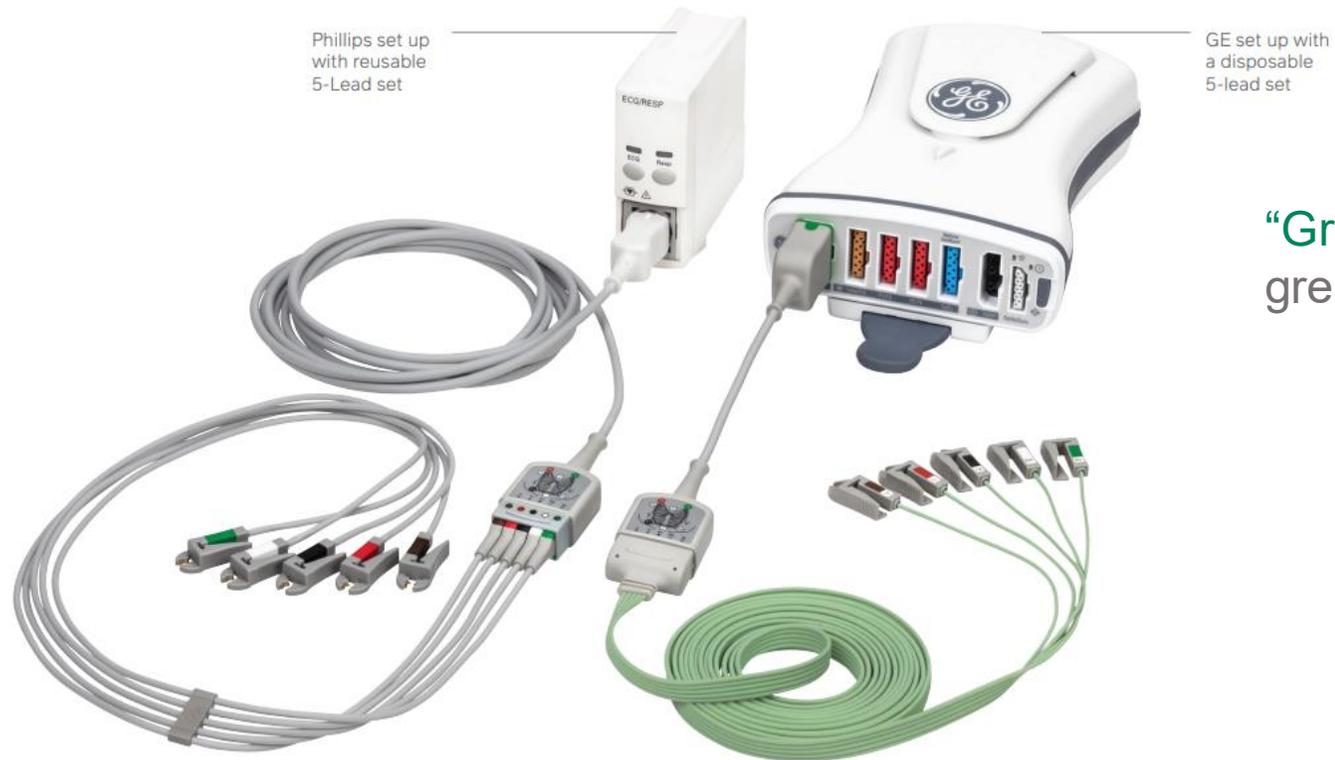
- Access to all major GPOs (multi-source OEM)*
- 99% market compatibility in US (no Fukuda Denshi)*
- X2 Dollar Cable Program facilitates easier conversion*
- Lower price point than Cardinal Health*

Leadwires

MULTI-LINK™ X2 ECG LEADWIRES

LATEX FREE | SINGLE PATIENT USE

Multi-Link™ X2 is the simple, versatile, smart solution for ECG cables and leadwires. It allows standardization of ECG leadwires for all major monitoring platforms: GE™, Philips™, Mindray™, Nihon Kohden®, Dräger™, Spacelabs™, Physio-Control™ and Zoll®.



INTERNAL USE ONLY

Why Disposable Leadwires?

- Faster room turn over
- No costly cleaning
- One patient - One leadwire
- May help reduce the risk of HAIs
- May help reduce nuisance alarms

The UW Study:

- The University of Wisconsin swabbed and cultured 100 of their clean, reusable leadwires
- **77%** came back with at least one form of antibiotic-resistant bacteria present, including MRSA and VRE

Most frequently cited study promoting the use of single-patient-use lead wires

Cardinal Health



Cardinal Health /Covidien /Kendall is the largest competitor in this space with over 75% market-share

- Often referred to as the “pink ones”

They provide pink adapters at the monitor

- Frequently go missing!

Leads have built-in disposable trunk, can be separated for use in telemetry

- Adds a lot of unnecessary cost, and lead is too long for GE telemetry

3M and Philips



3M

Approximately 10% market share

Tied into their strong electrode business

Supports reprocessing

Mostly "direct-connect" offering, no "universal" cables

Made by Lifesync



Philips

Only "direct-connect" offering, no "universal" cables, only connects to Philips monitors /cables

Monitoring Cables /Leads (Kepler)

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	China	Medium	All	No Increase
OEM Suppliers	China	Medium	All	No Increase
Cardinal Health	China	High	All	No Increase (COO Change likely)
Philips /Stryker	China US reprocessing	High		No Increase (COO Change likely)

Leadwires: Contracts

Neal Harpstrite	7023	National	Consumable Items for Patient Monitoring, Anesthesia and Ventilator Equipment	3/31/2025	Multi	Consumable Items for Patient Monitoring, Anesthesia and Ventilator Equipment, Medisorb, Cables and Leadwires
Kellie Vande Woude	PP-NS-1952	Premier	Fetal Monitoring	5/31/2027	Multi	Fetal Scalp Electrodes
Kellie Vande Woude	PP-NS-1942	Premier	Physiological Monitoring Agreement	5/31/2027	Multi	Cables and Leadwires
Derrick Tsou	VYAIR-0084491	National	Patient Monitoring: Master Equipment & Supplies	12/31/2025	Multi	Medisorb, ECG Cables and Leadwires, Fetal Scalp Electrodes
Kellie Vande Woude	PP-NS-1942	Capstone	Physiological Monitoring	5/31/2027	Multi	Cables and Leadwires
Kellie Vande Woude	PP-NS-1952	Capstone	Fetal Monitoring	5/31/2027	Multi	Fetal Scalp Electrodes
Kellie Vande Woude	PP-NS-1942	Yankee Alliance	Physiological Monitoring	5/31/2027	Multi - Green	Cables and Leadwires

Leadwires: Highest Volume SKUs

Top SKUs & ASP:

- 2052133-006, 5-lead Grab 39" \$10.54 36% Volume
- 2052133-007, 5-lead Grab 29" \$10.28 33% Volume
- 2052133-406, 5-lead Grab 12' \$11.07 7% Volume
- 2052104-006, 5-lead Snap 39" \$10.17 5% Volume
- 2052133-008, V-lead Grab 39" \$10.00 4% Volume
- 2052133-005, 3-lead Grab 39" \$10.80 4% Volume

Leadwires: Questions to Ask

- Are you using disposable leadwires?
- How are you currently cleaning if using reusable leadwires (show)?
- Which brand are you currently using (pink), how long have you been using them?
- What have you found to be the pros & cons of your current leadwires/cables?
- Does your facility give every patient disposable leadwires?
- How is the signal in your telemetry unit?
- What brand of monitors do you use in your facility?
- How do you handle it when your pink adapters go missing?

Leadwires: Questions to Ask

- How/who cleans your reusable leadwires and how do you store them post cleaning?
- Do patients have to switch leadwires when moving between different departments?
- What changes would improve patient care when using leadwires?
- If using disposable, what department or circumstances are they used in?
- Do you frequently notice frequent artifact in your EKG tracings?

Leadwires: Key Selling Points

- Better selection and improved quality over competitors
- Better signal in telemetry...29” length for telemetry. Cardinal offers 36”. Increased length may lead to decreased signal quality (white paper).
- Certified by GE for use with their monitors
- In most cases, less expensive than competition (usually nursing budget)
- May reduce dependency on adapters, can often reduce SKUs.
- Hospitals often put new leadwires on a patient each time they move into a different department. With X2, they can stay with the patient (saves time/effort).
- Faster room turnover, improved clinician workflow

Leadwires: Key Selling Points

No costly cleaning for disposable leadwires

Hospitals often put new leadwires on a patient each time they move into a different department. With X2, they can stay with the patient (saves time/effort).

Patient dedicated leadwires may reduce chances of cross contamination

Reusable cables = less waste vs Cardinal brand

*Prime Targets:

- Unhappy with current Telemetry signal (Pink CH)
- HCA hospitals all use GE Telemetry Monitors, AirLife has formulary position with HCA
- Hospitals that change leadwires for every department

Resources:

- X2 Connectivity Monitoring Guide
- Leadwire Literature Sheets
- White Paper vs Cardinal
- \$1 Cable Purchase Program (\$250 value per cable)
- GE Letter of Validation f/ Telemetry
- Leadwire/Cable Sample Case
- How to Videos

Leadwires: Objection Handling

Disposable leadwires are more costly: If you prevent 1-2 infections, your cost is made up here.

We use both disposable and reusable: Our disposable and reusable leadwires both fit our cables.

We don't have an infection problem: Get with the infection control department to help them understand.

We reprocess our disposables: This is not appropriate, as these products were meant to be disposable. They may be getting someone else's disposable leadwires back. Organic material, like blood, must be removed before sterilization. Leads are sterilized with Ethylene Oxide (EtO), a known carcinogen. Tough to keep track of # of times it's been reprocessed (more than 3x). Fuel and emissions in transportation is defeating purpose of environmental concerns.

Leadwires: Objection Handling

We need extra long & fully disposable leadwires like Cardinal.

Do you throw out your temperature cable? Cardiac output cable? NIBP hose? None of these get thrown out, so why would you throw out the ECG cable every time? Creating waste and spending too much. We have longer leadwires if they'd like. Also, the cardinal pink adapter is not disposable.

Will it work with my current monitors?

GE has officially approved the use of AirLife leadwires with their monitors in Telemetry. We are the only disposable with 39" leadwires which are optimum for Telemetry.

[Multi-Link X2 Product Overview Video](#)



Capnography (EtCO₂)

Market Dynamics Overview

Total Market Size*:

- Total Addressable Market - \$400M
 - Domestic - \$200M
 - International - \$200M
- Market Leaders (US only)
 1. Medtronic - \$90M and 45%
 2. AirLife - \$64M and 32%
 3. Philips - \$20M and 10%
 4. Masimo - \$7M and 3.5%

SOURCE: GHX, Clarivate, Medtronic inventor relations

Head Winds:

- O₂ Design Consolidation
- Manufacturing site moves
- Medtronic free use agreements
- Masimo proprietary Nomo line – heavily discounting and rebating

AirLife Market Share:

- AirLife Market Share - \$71M and 17%
 - Domestic - \$64.2M and 32%
 - International - \$6.8M and 3.4%

Tail Winds:

GPO contract positions:

- Premier
- HPG (sole source on STAT green)

High quality / lower price vs biggest competitor (Medtronic)

#1 brand (Salter) in standard luer connectors

*Disposables only. Capital equipment not included

EtCO₂ Product Portfolio

\$71.0M Revenue, \$39.2M GP, 55.3%GM

	Standard Luer Connectors	Reflective Connectors	Capnoflex	Anesthesia Sample Lines	Masks
Product	<i>SalterSTAT Standard</i>	<i>SalterSTAT Reflective</i>	<i>GE/Philips</i>	<i>Vital Signs</i>	<i>CapnoVue/Westmed</i>
Picture					
TTM Global Revenue	\$38.6M	\$12.5M	\$12.5M	\$5.0M	\$2.3M
Standard Margin	\$19.9M	\$9.3M	\$5.3M	\$3.1M	\$1.3M
25% Lower SM%	\$7.6M*	\$0	\$0	\$0	\$0.5M*
TTM Int'l Revenue	\$3.0M	\$0.2M	\$1.2M	\$2.1M	\$0.3 (WM only)

**Mostly private label*

Patient Interfaces

Cannulas

EtCO₂/O₂ – Provides oxygen and draws CO₂ sample

EtCO₂ – draws CO₂ sample only

Nasal



Oral-Nasal



Divided



Scoop



Piggyback / Dual / Blow by/ Bifurcated



Trunk



Masks

Used when higher O₂ is needed than a cannula can provide



With scope and without scope



Gas Sample Lines

Used with intubated patients on anesthesia machine or ventilator

Or when resuscitation bags are in use



With ET adapter



POM (Procedure Oxygen Mask)

CapnoVue can compete with POM
(1/2 the cost)

POM goes up to 85% or greater FiO_2

POM aperture has flaps that close
around the scope

POM has 2 entry points, oral or nasal,
depending on the procedure

POM goes up to 85% or greater FiO_2

POM aperture has flaps that close around
the scope

POM has 2 entry points, oral or nasal,
depending on the procedure



Monitoring Interfaces

Standard Connectors

- Work with any non-proprietary monitor
- Generic male or female luer lock



Female

Male

- Used on anesthesia machines in OR or GI suite



Blue luer connector
(Medtronic only)

Reflective Connectors

- Microstream monitors
Medtronic, Philips, Stryker/Physio Lifepak, Criticare, Masimo, BD Alaris pain pumps, Mindray



Orange
Short Term
Use

Yellow
Long-Term
Use

- Used on pain pumps, multi-parameter monitors, transport monitors

Proprietary Connectors

- Capnoflex Connectors
GE DASH & Carescape, Philips, Spacelabs



AirLife now has access do these through the legacy Vyair portfolio!

- Masimo NomoLine

✗ Not in our portfolio



Salter Reflective Connector Cannulas

Microstream monitors are extremely sensitive to moisture



- Our cannulas use a 0.2-micron barrier, hydrophobic disc filter that physically impedes line when moisture reaches certain level.
- Fibers go horizontally so as to not impede the signal

- Long term (yellow) cannulas in addition to disc filter have nafion tubing (moisture wicking material) in between connector and filter

Common Objections – Medtronic

Medtronic Strategy

- OEM manufacturer
- Connectors developed and tested specifically for Microstream monitors
- Claims non-OEM product will damage monitors and void warranty
- Ties consumables sales to capital purchases through contracts

[Medtronic Letter](#)

“Our reflective connectors offer equivalent performance to Medtronic in wave output and O₂ delivery at a lower cost of up to 25%. They have a special hydrophobic filter to protect the monitor and are backed by a AirLife limited warranty.”

GOAL: “If you can share your usage, I can create a cross-reference and bid that you can take to value analysis.”

Messaging against Medtronic

Objection	AirLife Response
SalterSTAT Reflective quality isn't as good as OEM Medtronic	“SalterSTAT Reflective connectors have over 200 evaluations in the Hospital and EMS environments with a variety of Microstream monitors. We also can provide you with a 3 rd party study*, demonstrating SalterSTAT Reflective superior quality against Medtronic’s.” White paper
Medtronic claims using non-OEM cannulas will void the monitor warranty	“Our cannulas use a 0.2-micron barrier, hydrophobic filter that physically impedes line when moisture reaches certain level. AirLife stands behind their cannulas and offers their own limited product warranty for monitors still under Oridion Medical or Medtronic warranty.” SalterSTAT Reflective Limited Warranty

** AirLife has never had to pay out a claim or a damaged monitor*

Messaging against Medtronic

Objection	AirLife Response
<p>Medtronic blow-by technology sampling CO₂ from both nares is the most effective design</p>	<p>“Approx 70-80% of population are born with septal deviation, but only a few require corrective treatment. A divided cannula can accommodate for this. There is no mixture of gases with a divided cannula. The result is a EtCO₂ waveform with an unaffected signal superior to Medtronic’s blow by design (see Ebert study) and it delivers significantly higher O₂ at 4 LMP compared to Medtronic.”</p>
<p>We have a free use agreement with Medtronic</p>	<p>Confirm how much consumable spend is needed in total. Sometimes oximeters are tied to the deal. If so, they might be able to just increase their oximeter spend to maintain their compliance, while still allowing them to switch to SalterSTAT Reflective.</p>

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	Mexico/China	High	Premier, HPG	Mild Increase
Medtronic	Mexico	High	Premier, HPG, Vizient	2025 15% decrease
Teleflex	Mexico	High	Premier	Static
Medline	China/Mexico	High	Premier, Vizient	Static

Capnography: Contracts

Neal Harpstrite	5311	National	Capnography, Nasal Cannulas	2/28/2026	Sole	Green, Blue, and SalterSTAT Reflective Range (Multi)
Derrick Tsou	MS1089	National	Respiratory Disposables	3/31/2027	Multi	AirLife Open, Inhalation / Sterile Water, O ₂ Mask, O ₂ Tubing, HME, HFNC, GE-validated ECG Cables and Leadwires, EtCO ₂ Cannulas Airway Mgmt Impact standardization 2%
Derrick Tsou	10005907	CAPTIS	Respiratory Disposables	6/30/2025	Multi	AirLife Open, Inhalation / Sterile Water, O ₂ mask, O ₂ Tubing, HME, HFNC Growth Rebate 2% on 10% Growth
Derrick Tsou	MS1089AB	Med/Surg Commit	Respiratory Disposables	6/30/2025	Multi	AirLife Open, Inhalation Sterile Water, O ₂ mask, O ₂ Tubing, HME, HFNC Growth Rebate 2% on 10% Growth
Kellie Vande Woude	GNVHA-NS-031	Acurity	Salter Labs Corporate Contract	8/31/2026	Multi	All Salter Labs Products
Kellie Vande Woude	PP-NS-1740	Capstone	Respiratory Disposables	8/31/2026	Multi	O ₂ Cannulas, Masks, and ALL Capnography
Kellie Vande Woude	PP-NS-1744	Capstone	Respiratory Disposables	8/31/2026	Multi	SNET, ALO, HFNC, EtCO ₂ , O ₂ Tubing
John Bowen	KP-11242	Kaiser Permanente	Respiratory Disposables	6/30/2026	Dual	Westmed and Salter Labs Cannulas
Kellie Vande Woude	PP-NS-1740	Yankee Alliance	Respiratory Disposables	8/31/2026	Multi - Green	O ₂ Cannulas, Masks, and ALL Capnography
Kevin Veenstra	36F79718D0536	FSS/VA	Respiratory Disposables	7/31/2028	Multi	Salter Branded. O ₂ , CO ₂ , Med Delivery, tubing
Kevin Veenstra	SP0200-17-H-0040	DAPA	Respiratory Disposables	1/1/2030	Multi	Vyaire Branded



INTERNAL USE ONLY

EtCO₂ Highest Volume SKUs

- 4707-7-7-25 | DIVIDED ADULT CAPNOGRAPY CANNULA, MALE LUER STYLE. 7' O₂ & 7' CO₂
- 2013067-003VY | CANNULA ORL/NSL CO₂/O₂ ADULT CAPNOFLEX D
- 2013066-004VY | CANNULA NASAL CO₂/O₂ ADULT CAPNOFLEX
- 4707F-7-7-25 | DIVIDED ADULT CAPNOGRAPY CANNULA, FEMALE LUER STYLE. 7' O₂ & 7' CO₂
- 73319-HEL | GAS SAMPLING LINE, 10FT, M/M
- 4707TG-7-7-25 | DIVIDED ADULT CAPNOGRAPY CANNULA, MALE LUER STYLE. 7' O₂ & 7' CO₂
- 4MSF1-7-6-25 | ADULT. O₂/ETCO₂ FILTERED ORAL/NASAL DIVIDED CANNULA, 7' O₂ LINE, 6' ETCO₂ LINE
- 4707-13-13-25 | DIVIDED ADULT CAPNOGRAPY CANNULA, MALE LUER STYLE. 13' O₂ & 13' CO₂
- 4707-10-10-25 | DIVIDED ADULT CAPNOGRAPY CANNULA, MALE LUER STYLE. 10' O₂ & 10' CO₂
- 4706F-7-0-25 | DIVIDED ADULT CAPNOGRAPY CANNULA, FEMALE LUER STYLE. 7' O₂ & 2" PIGTAIL CO₂

SalterSTAT: Questions to Ask

- Where do you currently monitor EtCO₂?
- What type of mask/cannula do you prefer?
- What type of sampling lines, monitor, and connectors (luer lock, reflective/yellow or orange, capnoflex) do you use (take pics)?
(most hospitals use standard & reflective)
- What have you found to be the pros and cons of the current product? Likes/dislikes?
- What quality improvement projects are you working on currently?
- When do your current contracts expire?

SalterSTAT: Key Selling Points

- Many well-respected organizations recommend EtCO₂ monitoring including the AARC, ASA, and AHA
- Significant (25%) savings by switching to Salter SalterSTAT Reflective
- Study results show equivalent and in some cases better performance than Medtronic
- CapnoVue provides significant savings (.5) over POM mask
- *Prime Targets:
 - On contract with HealthTrust (standard/luer/green: sole, reflective: dual) Vizient (dual with Medtronic) Ascension, & Premier.
 - Accounts looking for cost savings
 - EtCO₂ Sole on Premier AscenDrive, on VA FSS Contract (under Salter)

Resources:

- SalterSTAT Brochure
- SalterSTAT Playbook
- SalterSTAT Product Selection Sheet
- Riggs White Paper
- Ebert Study
- STAT Warranty
- EtCO₂ Targeting Tool
- SalterSTAT Savings Tool

SalterSTAT: Objection Handling

Objection	AirLife Response
I like Medtronic and they are the gold standard	Studies have shown SalterSTAT Reflective to be equivalent in FiO ₂ , EtCO ₂ , and Rise Time. In fact, SalterSTAT Reflective delivered 9% higher FiO ₂ at 4L than Medtronic (Riggs White Paper)
Your lines could harm our Medtronic machine	SalterSTAT Reflective Connector Warranty
The Blow-by cannulas are more effective	Studies have shown separate nasal cannulas (Salter) provide a higher pharyngeal O ₂ than the blow-by at 2, 4, & 6LMP than the blow-by (Ebert Study). Mean PaO ₂ was higher with separate than with blow-by. There was no significant difference in EtCO ₂ .
We have a committed use agreement with Medtronic	Is pulse oximetry or other items part of the agreement? Perhaps you could fulfill your agreement with other products. In addition, you will save approximately 25% by switching from Medtronic to SalterSTAT.
I need blow-by tech for patients with deviated septums	A very low % of the population has a deviation severe enough to require a different cannula. For these patients we do have this design (piggyback: Curaplex) if you need it for this patient population.

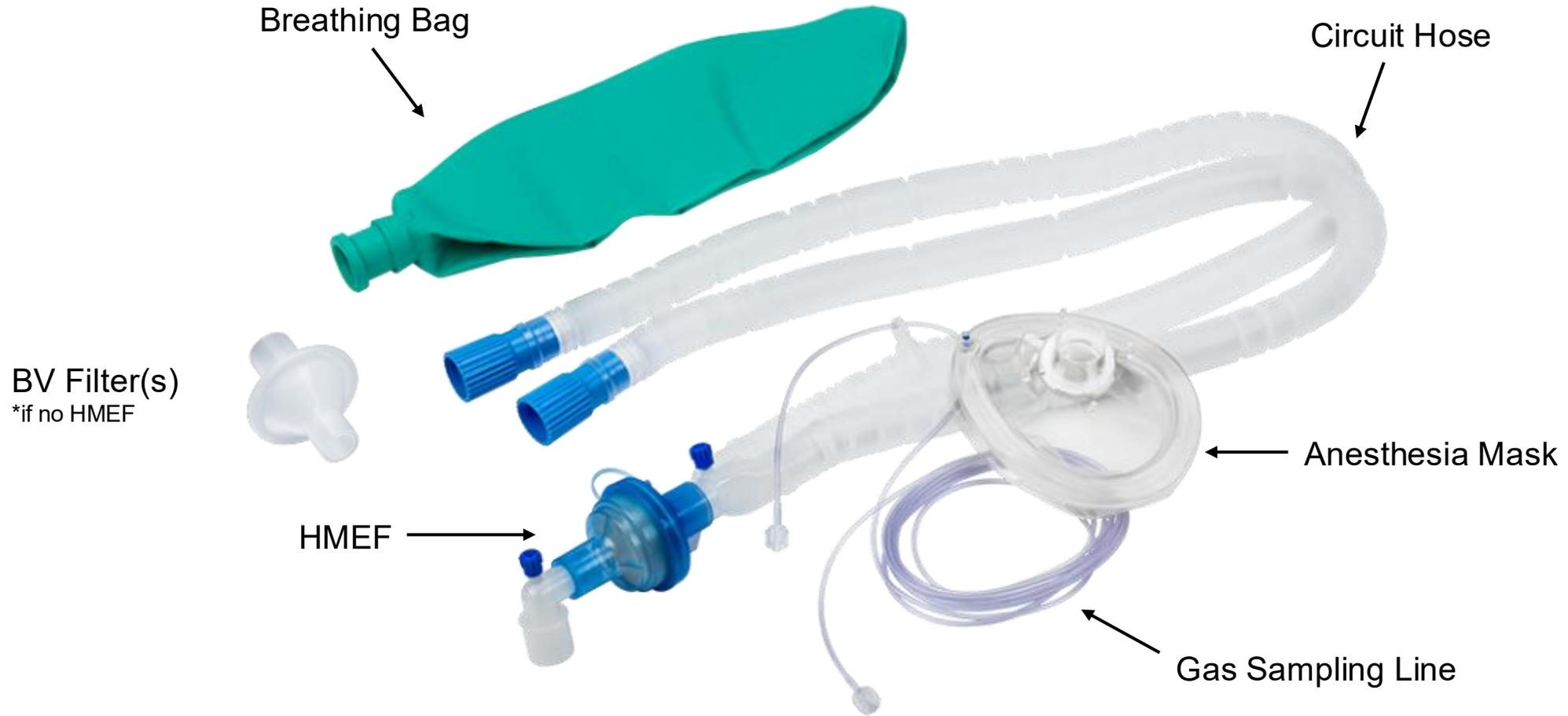


Anesthesia Circuits and Masks

Anesthesia Circuit Product Portfolio

	Anesthesia Circuit Kits			CO ₂ Absorber		Anesthesia Masks	Accessories
Product	Expandable and Corrugated	Uni-Lim™ and Pedi-Lim™	Limb-O®	Prefilled	Loose Refill	Disposable Anesthesia Masks	Breathing Bag, Harness, Omniflex
Picture							
Sizes	<ul style="list-style-type: none"> • Adult • Pediatric • Neonatal 	<ul style="list-style-type: none"> • Adult • Pediatric 	<ul style="list-style-type: none"> • Adult • Pediatric 	•GE compatible only	•One size	<ul style="list-style-type: none"> • Adult • Pediatric • Neonatal 	<ul style="list-style-type: none"> • 0.5 L • 1 L • 2L • 3 L
US 2023 Revenue	\$40,095,777			\$9,062,086		\$14,635,532	\$2,269,850
US 2023 Gross Profit	\$14,382,732			\$1,880,233		\$6,983,419	\$1,312,962
Int'l 2023 Revenue	\$10,009,536			\$4,639,121		\$2,381,625	\$605,231
Int'l 2023 Gross Profit	\$3,592,694			\$1,679,437		\$994,293	\$306,599

Parts and Pieces



INTERNAL USE ONLY

Circuit Types – Brands: Westmed & Vital Signs

Limb-O™

Limb-O™



Corrugated



Coaxial



Expandable



Competition

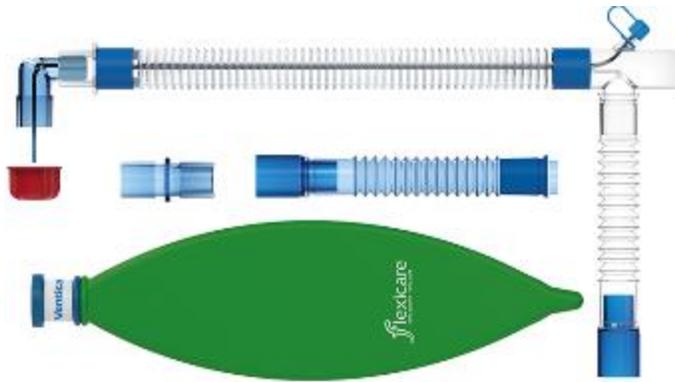
Intersurgical



AMBU



Flexicare



Medline



Competition



	Ambu	Medline
Configurations	All common styles Coaxial is expandable	All common styles
Quality	High quality	Multiple quality complaints, often fail leak testing
Contract Position	All contracts	Premier
Market Strategy	Lead with quality and standard configurations	Focus on custom configurations
Pricing	Market High (20% increase this year)	Market Low (passed on large increase to Vizient this year)

AMBU / Manifold

Offer all common circuit styles

- Expandable, Coaxial, etc....

Expandable coaxial

- VS is at length, but isn't expandable

Color coded product packaging

Circuit manifold and combined filter

- AMBU manifold stays on machine
- Costly to replace
- AirLife codes may have 1 or two filters

AirLife coaxial is all disposable unit

Vital Signs Premium Masks compare favorably to King Premium

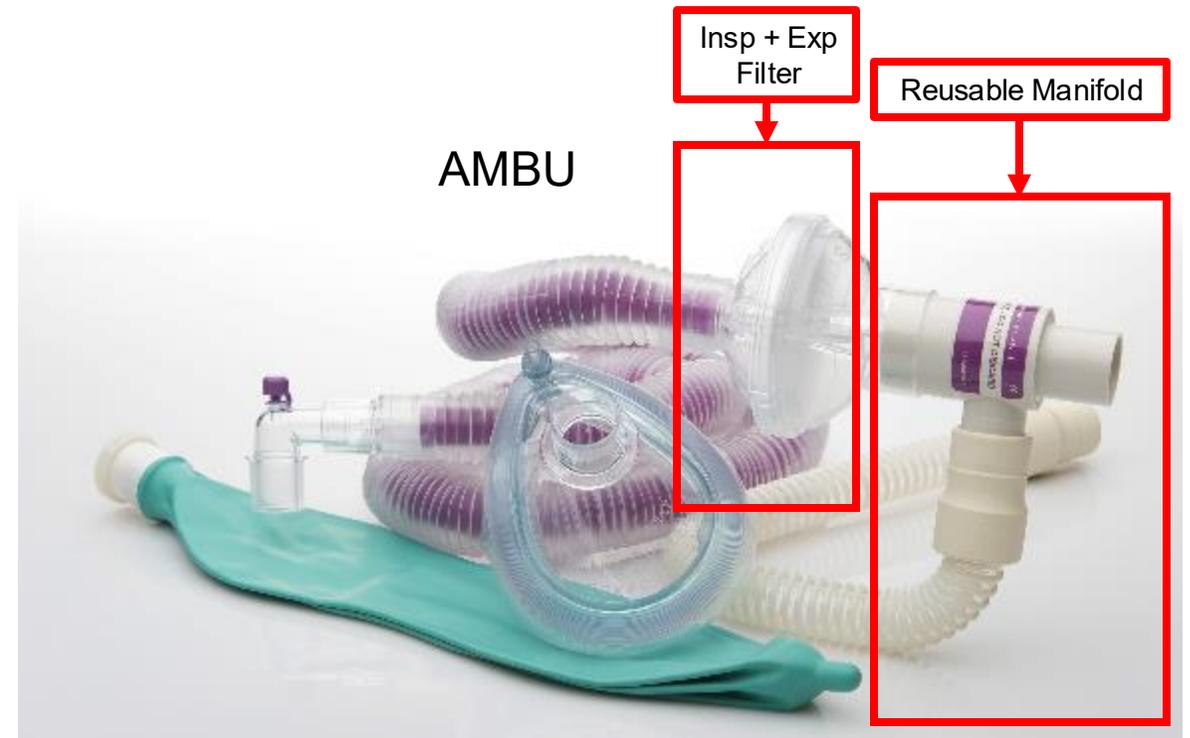
Breathing Bag bushing difference

Similar contents, lengths, and configurations

AirLife



AMBU



Common Objections - Medline

All common circuit styles

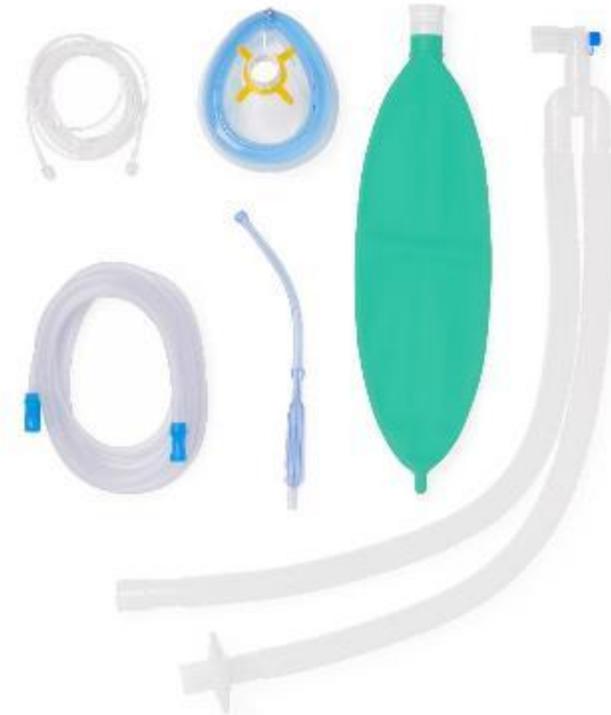
- Expandable, Coaxial, etc....

Noted low pricing for stripped down circuits

Offer multiple custom configurations and kits

Customers often complain of poor build quality, coming apart, and pliability issues

Leaking!



Breathing Masks: Features



- Cone
- User grip
- Hook Ring – connects harness, doubles as extra grip

- Crown
- Needs to be transparent for easy visualization of airway
- Flexible to assist in patient seal
- Smooth seams to prevent glove snags and tears

- Cushion
- Inflation Valve – location, tail or fixed
- Secure seating and sealing is important
- Minimal pressure to create a seal

Mask Portfolio



Flexible dome 6000

- Highest selling mask group
- Top valve
- Flexible crown
- Available in sizes 0-6
- Clear hook ring
 - No hook ring for ped/inf/neo

Vent Mask

- Superior ergonomic cushion
- Tail valve
- Flexible crown
- Available in sizes 1-6
- Grey hook ring
 - No hook ring for ped/inf/neo

Vent Mask II

- Air-filled, pliable ultra thin cushion
- No valve
- Flexible crown
- Available in sizes 00-6
- Grey hook ring
 - No hook ring for ped/inf/neo

INTERNAL USE ONLY

Medisorb and Medisorb EF CO₂ Absorbent

- Medisorb has been specified for use with and validated for GE anesthesia machines
- Unique D-profile granule shape decreases packing and channeling allowing better gas flow through absorbent bed
- Available in a variety of packaging options
- Medisorb EF is free from a strong alkali, meaning that it does not generate Compound A, or carbon monoxide
- Medisorb EF offers a permanent color change to violet when desiccated

Product	Calcium Hydroxide	Calcium Chloride	Calcium Sulphate	Lithium Chloride	Sodium Hydroxide	Potassium Hydroxide
Medisorb EF	>75%				<1%	
Medisorb	>75%				<4%	
Amsorb Plus	>80%	<3.5%	<1.5%			



Competitors

Manufacturer	Standard	Low Alkaline	No Alkaline
AirLife	Medisorb™	Medisorb™ EF	
ICU Medical	Sodasorb	Sodasorb LF	
GE/Amsorb/Armstrong Medical			Amsorb Plus
Flexicare/Allied Healthcare	Carbolime		LithoLyme (Lithium)
Intersurgical	Intersorb	Spherasorb	LoFlosorb
Molecular Products*	Sofnolime	Sofnolime Solo	
Micropore - Spiralith			SpiraLith Ca
Drager Medical**	Dragersorb	Dragersorb Free	

Comparative CO₂ Absorbent Study

Not all absorbents perform equally

Medisorb efficiency drives long utilization time and superior economics

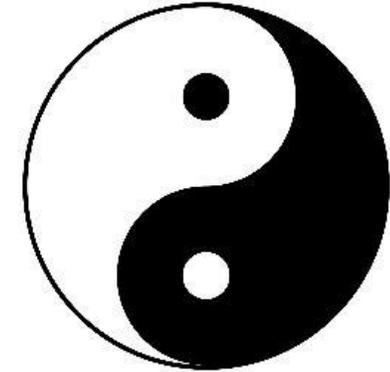
Table 2 Study results

Brand	Macro shape	NaOH (%)	Micro shape	Weight fresh product in compact bloc (g)	Density (g/100 mL)	Volume fresh product in compact bloc (mL)	CO ₂ flow (mL/min)	F _A CO ₂ -F _I CO ₂ (%)	Time per 100 mL of product for F _I CO ₂ to reach 0.5%		
									min	CV (%)	
LoFloSorb	Granular	0	Spheres	461 (5)	67 (0)	687 (7)	160 (3)	4.4 (0.1)	50 (2)	5	¶
Amsorb plus	Granular	0	Broken cylinders	449 (11)	65 (1)	688 (16)	160 (2)	4.3 (0.1)	56 (3)	6	¶ †
LithoLyme	Granular	0/LiCl	Broken cylinders	464 (17)	67 (0)	691 (26)	161 (1)	4.3 (0.1)	59 (3)	5	§ †
SoLo	Granular	<1	Broken fragments	452 (16)	64 (1)	707 (30)	160 (1)	4.3 (0.1)	61 (5)	8	§ †
SodaSorb LF	Granular	<1	Broken cylinders	529 (4)	73 (1)	730 (15)	161 (1)	4.1 (0.1)	66 (2)	4	§ ++
DrägerSorb Free	Granular	0.5-2	Hemisphere	544 (9)	77 (0)	709 (12)	160 (1)	4.3 (0.2)	69 (2)	4	++
Spherasorb	Granular	1.5	Spheres	517 (14)	75 (0)	686 (18)	161 (2)	4.3 (0.2)	70 (1)	1	++
AtraSorb	Granular	2.5-3.0	Bullet	584 (14)	80 (0)	726 (18)	160 (3)	4.3 (0.1)	72 (1)	2	¶¶ ++
Sofnolime	Granular	<3	Broken fragments	561 (9)	78 (0)	721 (12)	161 (1)	4.2 (0.3)	77 (2)	3	¶¶
Sodasorb	Granular	<4	Broken cylinders	586 (14)	85 (1)	690 (21)	161 (2)	4.3 (0.1)	78 (4)	5	¶¶
Intersorb Plus	Granular	3	Broken cylinders	564 (29)	80 (1)	701 (32)	158 (0)	4.2 (0.1)	88 (6)	6	‡
Medisorb	Granular	1-2	Broken fragments	544 (6)	77 (1)	711 (10)	161 (1)	4.2 (0.1)	88 (4)	5	‡
FLOW-i	Granular	<3	Broken fragments	559 (9)	79 (2)	704 (26)	160 (2)	4.2 (0.1)	90 (2)	2	‡
DrägerSorb 800+	Granular	2	Hemisphere	578 (4)	82 (0)	702 (5)	160 (2)	4.3 (0.1)	91 (1)	1	‡
SpiraLith Ca [®] with indicator*	Cartridge	<1	preformed channels	824 (11)**	88 (1)	933 (0)***	160 (1)	4.5 (0.1)	95 (1)	1	‡ \$
SpiraLith Ca [®] NI (no indicator)*	Cartridge	<1	preformed channels	815 (7)**	87 (1)	933 (0)***	161 (1)	4.3 (0.2)	100 (1)	1	\$

Competitive Notes

Medisorb and Draegersorb are market leaders

- Medisorb = GE
- Draegersorb = Draeger
- Others
 - Amsorb – recent collaboration with GE
 - Intersurgical (Spherasorb)
 - Other smaller players include Flexicare (LithoLyme) and Atrasorb



**Medisorb canister presently is not compatible with Draeger machines
Draegersorb presently is not compatible to GE machines**

Anesthesia Circuits and Masks

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
Anesthesia Circuits / Masks				
AirLife	Mexico / China	High / Medium	HPG Dual, Premier, Vizient	
Ambu	US / China	High / Medium	HPG Dual, Premier, Vizient	Increase
Medline	Mexico, China, Other	High / Medium	Premier	Increase
CO ₂ Absorbent				
AirLife	Mexico	Medium	HPG, Premier, Vizient	
Amsorb	Europe	Medium	HPG, Premier, Vizient	Unknown
Intersurgical	Europe	Medium	HPG, Premier, Vizient	Unknown

Anesthesia Circuits / Absorbents: Contracts

Neal Harpstrite	102574	National	Anesthesia Circuits and Masks	2/28/2027	Dual	Anesthesia Circuits and Masks Limbo, Westmed & Vital Signs
Derrick Tsou	MS5384	National	Anesthesia Masks and Circuits	9/30/2025	Multi	Vital Signs, SNET, Circuits, Gas Sampling Lines Specialty Care Impact Standardization 3%
Derrick Tsou	VYAIR-0147140	National	Anesthesia Circuits and Masks	3/31/2025	Multi	Vital Signs, Circuits, Anesthesia Masks, Gas Sampling Lines
Derrick Tsou	MS5384AB	Children's Hospital Association	Anesthesia Masks and Circuits	9/30/2025	Sole	Vital Signs, SNET, Circuits, Gas Sampling Lines Specialty Care Impact Standardization 3%
Derrick Tsou	MS5384AC	IHN	Anesthesia Masks and Circuits	9/30/2025	Sole	Vital Signs, SNET, circuits
Blair Hobgood	MS143	Partners Cooperative	Anesthesia Circuits and Masks	9/30/2025	Multi	Westmed Circuits, Masks and Bags
Derrick Tsou	CE7154	National	Anesthesia After Market Products (CO ₂ Absorbents)	12/31/2025	Multi	Medisorb, CO ₂ Absorbent
John Bowen	KP-11035	Kaiser Permanente	CO ₂ Absorbents	8/31/2026	Sole	Medisorb
Blair Hobgood	RESP55	Partners Cooperative	CO ₂ Absorbent	11/30/2027	Multi	CO ₂ Absorbent

INTERNAL USE ONLY



Anesthesia Circuits: Highest Volume SKUs

- A4UX2044 | ANES CIRCUIT, ADULT, 108 IN EXP, 3L BAG
- ADU520X4D | ANES CIRCUIT, ADULT, 108 IN EXP, 3L BAG
- AMY520X4F | ANES CIRCUIT,ADULT, 120 IN EXP, 3L BAG
- AFNX2044 | ANES CIRCUIT, ADULT, 72 IN LIMBO, 3L BAG
- A5U510X4 | ANES CIRCUIT, ADULT, 108 IN EXP, 3L BAG
- 5610004 | 72" ADLT UNI-LIM CIR, GSE W/TETHERED CAP, 2 BV FILTERS,10'X.050" M/M GSL, LRG ADLT MASK,3L,HC,HMEF

Anesthesia Masks: Highest Volume SKUs

- 6850 | MASK, ANES, FLEX, ADULT SIZE 5, TOP VLV,
- 6820 | MASK, ANES, FLEX, INF SIZE 2, TOP VLV
- 6840 | MASK, ANES, FLEX, CHILD SIZE 4, TOP VLV
- 5241 | MASK, ANES, ROUND, CHI SIZE 4, TAIL VLV
- 6851 | MASK, ANES, FLEX, ADULT SIZE 5, TOP VLV
- 6830 | MASK, ANES, FLEX, TODLR SIZE 3, TOP VLV

Anesthesia Circuits / Absorbents: Questions to Ask

- What vendor do you currently use?
- What do you like/dislike about the current product, is there anything you would change?
- How many kits do you keep in stock?
- How can you tell if the Ambu reusable manifold is dirty or needs to be changed out?
- Do you need kits for pediatrics, neonates, and MRI?
- What components are in the kits?
- *Take a picture of label and components to xRef

Anesthesia Circuits / Absorbents: Key Selling Points

Many configurations of quality circuits at a competitive price

We can customize kits for large opportunities (>\$150k)

Every circuit is pressure/leak tested before goes out the door (Medline known to have leaking/quality issues)

Medisorb / Medisorb EF usually price advantaged over comparable competitors.

Medisorb EF does not produce toxic Compound A substance

*Prime Targets

- Tenet/USPI Circuit Win
- HealthTrust dual source on circuits, price advantaged
- Ascension/TRG circuit contract
- Circuits: Vizient on contract, dual with Ambu (no Medline except on MS Commit & Captis)

Anesthesia Circuits / Absorbents: Objection Handling

Breathing bag does not stay on the machine

If you give it a pinch and quarter turn twist it will be tight and stay on.

I like my Ambu circuits

We have a disposable adapter which will not become soiled like the reusable Ambu adapter.

Resources:

- Circuit Attribute Tool (PBI)
- Product Literature Sheets
- Comparative CO₂ Absorbent Study
- HealthTrust Circuits Lit Sheet

AirLife™



SuperNO₂VA[®] Et

INTERNAL USE ONLY

Who?

Scope: Anesthesiologists, Certified Registered Nurse Anesthetists (CRNA), Registered Nurses (RN), and Respiratory Therapists (RT).

Delegation: Nasal PAP is recommended for the following patients receiving moderate or deep procedural sedation or recovering from general anesthesia in the PACU:

BMI \geq 30 kg/m²?

Obstructive sleep apnea (OSA) or STOP BANG \geq 3

Congestive heart failure (CHF)

Chronic obstructive pulmonary disease (COPD)

Oxygen saturation $<$ 95% on supplemental oxygen

Nasal PAP is also recommended postoperatively for the procedures:

Bariatric surgery

Thoracic surgery

Abdominal surgery

Cardiac surgery



[SuperNO2VA Video](#)

(1:06)

Quick Tip – SuperNO₂VA Et Mask Selection



- Assess the size of the nose rather than height for best mask fit
- Most patients will use a Medium Mask (**Green**)
- If the tip of nose pushes against shell of mask or if bottom of mask pushes against the nares, then use the Large Mask (**Blue**)

SuperNO ₂ VA™ Et device size	Suggested patient height
Adult medium	4'7" – 6'9"
Adult large	5'10" – 7'3"

Adult medium 4'7" – 6'9"	Adult large 5'10" – 7'3"
 <p>SuperNO₂VA Et</p>	 <p>SuperNO₂VA Et</p>

SuperNO₂VA Et: Contracts

Derrick Tsou	MS5384	National	Anesthesia Masks & Circuits	9/30/2025	Multi	Vital Signs, SNET, Circuits, Gas Sampling Lines Specialty Care Impact Standardization 3%
Derrick Tsou	MS5384AB	Children's Hospital Association	Anesthesia Masks & Circuits	9/30/2025	Sole	Vital Signs, SNET, Circuits, Gas Sampling Lines Specialty Care Impact Standardization 3%
Derrick Tsou	MS5384AC	IHN	Anesthesia Masks & Circuits	9/30/2025	Sole	Vital Signs, SNET, Circuits

SuperNO₂VA Et: Highest Volume SKUs

- SSM-20 | MEDIUM SUPERNOVA SATELLITE KIT
- SSEM-20 | SUPERNOVA ET SYSTEM, MEDIUM
- SSL-20 | LARGE SUPERNOVA SATELLITE KIT
- SSEL-20 | SUPERNOVA ET SYSTEM, LARGE
- SNM-20 | SUPERNO2VA NASAL INTERFACE MEDIUM

SuperNO₂VA Et: Questions to Ask

- How do you handle difficult airways before, during, and after surgery?
- How do you handle larger patients that are not intubated but need surgery?
- Where do you stock your most used anesthesia masks?
- Can SuperNO₂VA ET be added to your protocols for patients greater than 30 BMI?

SuperNO₂VA Et: Key Selling Points

Transportable, requires only an air source

No capital equipment required.

Relieves upper airway obstruction

Can be used in PACU as low flow device for ventilation

Can rescue ventilate

Measures end-tidal EtCO₂

*Prime Targets

- High volume hospitals and surgery centers.
- On Vizient Reserve program as part of anesthesia Circuits/Masks
- Usage driven by in-services.
- For patients that don't need an ETT but will be sedated.

Resources:

- SuperNO₂VA Lit Sheet
- Dr. Dimou Study
- SuperNO₂VA Et Clinical Summary

SuperNO₂VA Et: Objection Handling

Will this cause gastric insufflation?

- The amount of positive pressure generated by the SuperNO₂VA Et system based on flow and resistance is below the esophageal opening pressure.
- **The cost of the SuperNO₂VA Et is too much:**
 1. What is the cost to interrupt a procedure to stabilize a patient?
 2. What is the cost to cancel/re-schedule a procedure when the patient can't be oxygenated or ventilated with standard devices?
 3. Patients can be rescued, ventilated, and transported on positive pressure with SuperNO₂VA Et.
 4. What is the cost to set up BiPAP in PACU? SuperNO₂VA Et can be used in PACU as a positive pressure device to relieve an upper airway obstruction or as a low flow device for oxygenation. No capital equipment is needed with SuperNova Et.
- **Can this cause a fire?**
 - You can use blended O₂ and bring FiO₂ down to 30% to reduce risk.

AirLife™



AirLife DuoTherm®

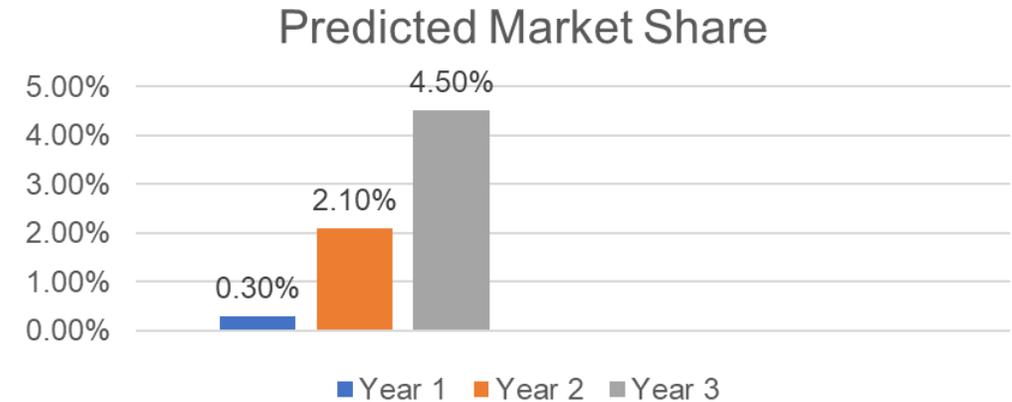
INTERNAL USE ONLY

Market Dynamics Overview

Total Market Size: *Source - Journal of trauma and acute care*

- **CAGR – 4%**
- **Total Addressable Market (Heater and circuits)**
 - **Global** **\$520M**
- **Market Leaders - Domestic**
 - **Fisher and Paykel** **77%**
 - **Medline** **13%**
 - **Hamilton/Flexicare** **10%**

AirLife Market Share:



Head Winds:

- F&P is releasing the MR950 heater
- F&P MR950 and Hamilton H900 both have integrated temperature probes
- F&P has supportive clinical data which DuoTherm does not
- F&P has 72 clinically trained reps
- Saturated market due to COVID
- DuoTherm unproven in the market

Tail Winds:

AirLife Agreement / HPG

Aging fleet of heaters in the market that need to be replaced

F&P and Hamilton have higher ASPs associated with the newer technology (integrated temp probes)

Self-Manufactured product

F&P customer fatigue

Medline Neptune heater technology is outdated

AirLife DuoTherm® Humidification System

Easy to use and setup

Covers neonatal through adult patient populations

Pre-set Invasive, Pre-set non-invasive and Free mode

Temperature probes with durable stainless-steel tips that can be disinfected with wipes

Light weight, flexible, and extended length (adult) circuits

Intuitive alarm package



DuoTherm System Overview

DuoTherm
Heater Base



Temperature
Probes
5ft and 6ft options



Brackets &
Poles



Heater Wire
Adapters



Dual and Single limb
options



Water
Bag and Bottle options



Circuits & Chamber



Invasive Ventilation

- Adult
- Pediatric
- Neonatal

Non-Invasive Ventilation

- Adult
- Pediatric
- Neonatal

High Flow O₂ Therapy

- Adult
- Pediatric
- Neonatal



Pressure Relief
Valve

INTERNAL USE ONLY

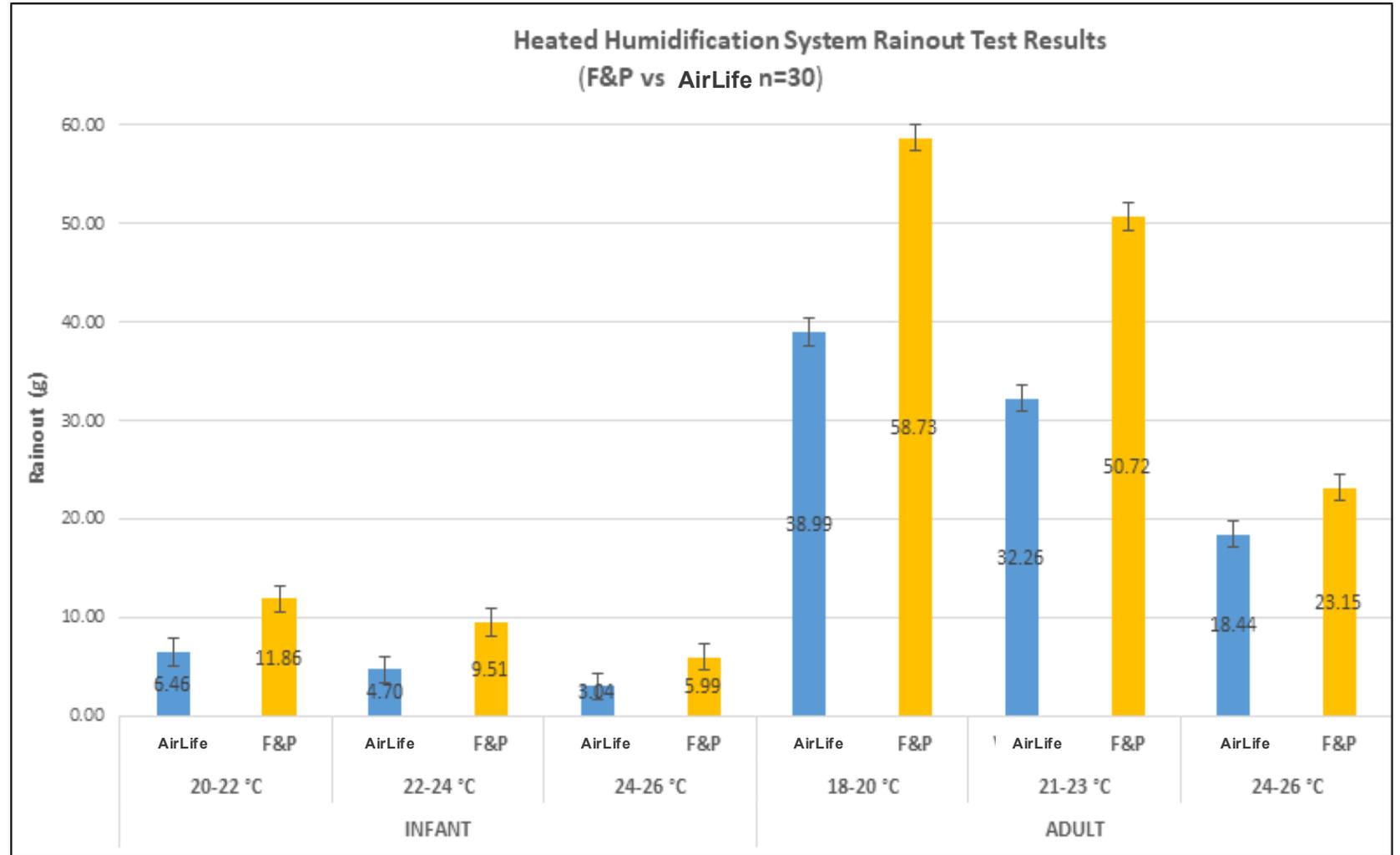
Rainout Control – DuoTherm™ vs Competitor over 24 hr. Test Period

Testing materials:

- 37747CE – Adult Dual limb
- 37723CE – Neonatal Dual Limb
- 377CBRE - Chamber

Fisher and Paykel:

- RT280 – Adult Dual Limb
- RT265 – Neonatal Dual limb
- MR290 - Chamber



AIRLIFE DUOTHERM® VS. THE COMPETITION



Company	AirLife	Fisher & Paykel	Fisher & Paykel	MedLine	Hamilton	Flexicare
Brand	AirLife DuoTherm®	MR850	MR950	Neptune	H900	FL-9000
Patient Type	Adult, Pediatric, Neonatal	Adult, Pediatric, Neonatal	Adult, Pediatric, Neonatal	Adult, Pediatric, Neonatal	Adult, Pediatric, Neonatal	Adult, Pediatric, Neonatal
Features & Benefits	<ul style="list-style-type: none"> Pre-Set Mode & Free Mode 5' (Neo) & 6' Dual-Walled Tube Auto-Fill Chamber with Dual Float Intuitive Alarm Package Utilizes AirLife Water for Inhalation 	<ul style="list-style-type: none"> Auto Mode 5' Evaqua Tube Auto-Fill Chamber Basic Alarm Package Utilizes AirLife Water for Inhalation 	<ul style="list-style-type: none"> Auto Mode & Free Mode 6' Heated Wall Tube Auto-Fill Chamber with Dual Float Intuitive Alarm Package Utilizes AirLife Water for Inhalation 	<ul style="list-style-type: none"> Auto Mode & Fully Adjustable Mode Standard Circuits Auto-Fill Concha Column Basic Alarm Package Utilizes Proprietary Inhalation Water 	<ul style="list-style-type: none"> Auto Mode Enhanced Circuits Auto-Fill Chamber Intuitive Alarm Package Utilizes AirLife Water for Inhalation 	<ul style="list-style-type: none"> Auto Mode & Adjustable Mode Enhanced Circuits Auto-Fill Chamber Basic Alarm Package Utilizes AirLife Water for Inhalation
Temperature Probes	<ul style="list-style-type: none"> Stainless Steel Reusable 	<ul style="list-style-type: none"> Ceramic/Glass Reusable 	<ul style="list-style-type: none"> Integrated Disposed of with Circuit 	<ul style="list-style-type: none"> Clear Plastic Reusable & Disposable options 	<ul style="list-style-type: none"> Integrated Disposed of with Circuit 	<ul style="list-style-type: none"> Blue Plastic Reusable
Product Brochure						
Disadvantages	—	<ul style="list-style-type: none"> Old Technology Will be EOL 	<ul style="list-style-type: none"> Expensive Heater Base Expensive Circuits 	<ul style="list-style-type: none"> Old Technology Poor Rainout Control 	<ul style="list-style-type: none"> Expensive Heater Base Expensive Circuits 	<ul style="list-style-type: none"> Poor Technology Poor Rainout Control

AirLife DuoTherm

Pre-set and Free Modes

- Free
- Invasive
- Non-invasive

Dual Walled Circuits – 5 and 6 feet

- Neonatal, Pediatric, Adult

Stainless steel temperature probes

Auto-Fill Chamber

Intuitive Alarm Package

Utilizes AirLife Inhalation Water



Fisher and Paykel – MR850

Market leader - ~85%

30-year-old technology

Auto mode

- Invasive
- Non-invasive

Ceramic temp probes

Evaqua circuits – 5 feet

- Infant/Ped and Ped/Adult

Auto-Fill chamber

Basic alarm package

Utilizes AirLife inhalation water



DuoTherm Vs MR850 – Display Screen

DuoTherm has a large display which shows:

- Set patient temperature
- Set chamber temperature
- Humidity level
- Mode of therapy
- Expiratory limb heating power
- Misc symbols (ex. Warming up)
- Active alarm visuals
- Ambient light sensor
- Multiple buttons to navigate features

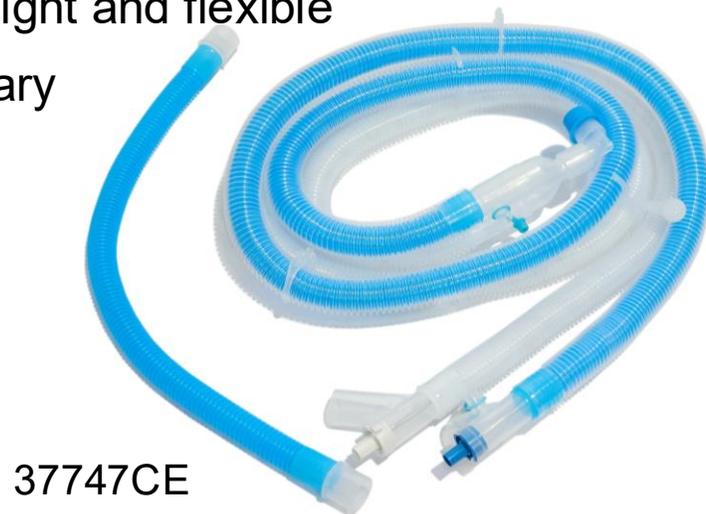


MR850 only displays the set chamber temperature in a small box, simple alarm display, only one button to change settings, power button and mute button.



DuoTherm Vs MR850 – Circuits

- DuoTherm:
- Dual walled
- 30 days of use
- Neonatal, pediatric, and adult
- 5 feet Neonatal and Pediatric length
- 6 feet Adult length (NIV is 5 feet)
- Light weight and flexible
- Proprietary



37747CE

- MR850:
- Evaqua 2 technology
- 14 days of use
- Infant/Ped – Ped/Adult
- 5 feet length for all circuits
- Not proprietary (ex: AirLife AH codes)



RT280

DuoTherm: Key Items for Trial

Banners

377HTR Heater bases (max 2)

Stands (max 2)

Circuits:

37747CE – Adult dual limb

37756CE – Adult NIV

37748CE – Pediatric dual limb

37723CE – Neonatal dual limb

NIV masks

NIV043M – Medium full face NIV mask, non-vented, w/ AAV

NIV041M – Medium full face NIV mask, non-vented

HFOT nasal cannula

14934 – Medium HFNC

Literature pieces

DuoTherm: Questions to Ask

- What humidification system are you using, and how long have you been using it?
- What have you found to be the pros and cons of the current system?
- Would you be open to looking at a new system? Why or why not?
- What about the humidification workflow/treatment are you most passionate about?
- What is your circuit change-out policy?
- Can you convert without a trial?
- How do you deal with the following issues?
- Budget • Inability to adjust therapy • Rainout issues • Broken/lost temperature probes

DuoTherm: Key Selling Points

- Alarm sensors will let you know before running out of water. With MR850, delay can be up to 30 minutes before alarming.
- Stainless steel temp probe tips more durable than MR850 ceramic and can be wiped to clean at bedside.
- Circuits are 30-day use, MR850 circuits are 14-day use.
- Temp probe and circuit length both come standard 6 feet. MR850 circuit standard if 5 feet.
- Can decrease power to the expiratory limb.
- Study shows DuoTherm Dual-wall circuit has less rain-out compared to MR850 (DuoTherm NIV circuit is 5ft and not dual wall...rainout not an issue with NIV)

DuoTherm: Key Selling Points

- DuoTherm has 3 size circuits: neo (10 mm), ped (15 mm), adult (22 mm). MR850 only has 10 & 20.
- MR850 is 30-year old technology and usually more expensive (DuoTherm Circuits about \$27, MR850 about \$30)
- Large, intuitive display screen with light sensor
- DuoTherm Alarm package is more descriptive with pictures displayed for easy explanation
- Comes standard with hang tag alarm guide that show alarm remedies
- Invasive, non-invasive, and unique free mode operation (can set temp & moisture independent of each other). MR850 only has pre-set modes (inv/non-inv)

DuoTherm: Key Selling Points

- DuoTherm Water level sensors can be left on or turned off
- MR950 heater base & circuits are much more expensive than DuoTherm
- 1 year warranty is standard

***Prime Targets:**

- Current F&P MR850 users with or without committed use agreements
- Customers that use our AH circuits and purchase our inhalation water
- AirLife Enterprise Agreement / GPO program pull-through
- On Vizient Contract

Resources:

- DuoTherm Lit Sheet
- Competitive Comparison
- Launch Binder
- Demo Kit
- Training Video
- Quick Start Guide
- Alarm Guide

DuoTherm: Objection Handling

I am used to the MR850 operation

There are many features that the DuoTherm offers that the current system does not, and you will most likely save money vs current costs.

[DuoTherm Launch Binder](#)



Humidification (Sterile Water & Saline)

INTERNAL USE ONLY

Market Dynamics Overview

Total Market Size: Sources – GHX and PiSA

- **CAGR – 5.0%**
- **Total Addressable Market – Domestic**
 - **Water** **\$84M**
- **Market Leaders - Domestic**
 - **AirLife** **70%**
 - **Medline** **15%**
 - **Pharma (irrigation)** **10%**

AirLife Market Share:

- **AirLife Market Share**
 - **AirLife continues to be the market leader in inhalation water**
 - **2 new competitors in the past 3 years**
 - **Sensimedical**
 - **Amsino**
 - **Baxter/pharma are 3rd largest market share holder with irrigation water sales**

Head Winds:

- **Medline and McKesson shifting business to their branded saline/water vials away from Modudose and Ballard**
- **SensiMedical selling through NovaPlus and direct with lower pricing, converting business**
- **Amsino selling on lower price**
- **Flex bags patient safety issues, similar to IV bag**
- **AirLife is still 15% higher, even with SensiMedical price increase**

Tail Winds:

- **AirLife is trusted market leader**
- **Baxter manufacturing issues post hurricane**
- **Water codes on AirLife Secure and AirLife Agreement ensure product for customers**
- **Moving forward with flex container launch to differentiate flex bags from IV bags**
- **SensiMedical announced a price increase of 13% effective 8/1/2024**

Sterile Water & Saline



CHB0010

CHB0020

2D0735X

2D0737

How Dose Humidification Fit in Respiratory Care



Inhalation

Application & Features

- Prevent drying of airways
- Ventilator & HFOT therapy
- Active humidification

Cross-Selling

- Heated circuits/chambers
- NIV masks
- HFOT interfaces



Lg. Volume Nebulizer

Application & Features

- Prevent drying of airways
- Used at 6-12 L/min
- Aerosolizes water/saline

Cross-Selling

- Aerosol masks
- Trach masks
- Corrugated tubing



Bubble Humidifier

Application & Features

- Prevent drying of airways
- Used at 1-6 L/min, typically

Cross-Selling

- Nasal cannula



Modudose & Irrigation

Application & Features

- Cleaning, removing secretions & dilutions
- Suction & med delivery

Cross-Selling

- Open Suction kits
- Verso closed suction
- Nebulizers
- Trach care kits

Pre-filled Bubble Humidifier

- Bubble humidifiers are filled with sterile water and are used on
- Adds humidity for patient comfort. Dry gasses can cause nasa
- Used with a nasal cannula
- Gas flow ranges from 1-6 LMP
- Cannot be refilled
- Sometimes referred to as a bubbler
- Product code: 002620
- Cross Sell: Nasal Cannulas



Competition – Bubble Humidifiers

Medline Hudson RCI - AquaPak

- 340 mL
- 540 mL
- 650 mL

McKesson Bubble Humidifier

- 350 mL

Amsino - Amsure

- 350 mL
- 550 mL



Pre-filled Large Volume Nebulizers

Large Volume Nebulizer

- AKA Aerosol bottle
- Kit includes adapter and bottle of:
 - Water
 - Saline
- Used with an aerosol mask, trach mask, or blow by (no interface)

Product codes: CK0005, CK0010, CK4505, CK4510

Replacement water

- Used to fill humidifiers (not prefilled) and nebulizers
- CN0010 (1L) not for sale
- Cannot be spiked

Product code: CN0005

Cross Sell: Corrugated tubing, Aerosol and Trach Masks



Competition – Pre-filled Large Volume Nebulizers

Large Volume Nebulizer

- Medline Hudson RCI - AquaPak
- Multiple configurations of water and saline
- Can buy adapter separate

Replacement Water

- Amsino
 - 350 mL
 - 500 mL
 - 1000 mL



Irrigation Solutions

Irrigation solution

- 0.9% saline
- Dual top:
 - Twist off spout Eat:
 - Screw off cap EL
- 110 mL
- Used during trach care

Product Code: AL4109

Cross Sell: Trach care kits



Modudose Unit Does Solution

Used for suctioning and medication delivery

Sterile water and sterile saline options

3 mL, 5 mL and 15 mL options

Product Codes: 5257, 5251, 5262,
AL7025, AL7023

Cross Sell: Open Suction Kits,
Closed Suction and Medication Delivery



Competition

Medline Hudson RCI

- Sterile water
- 0.45% Saline
- 0.9% Saline

Amsino (formally Smiths)

- Sterile Water
- 0.9% Saline



Flex Bags and Hanging Bottles

Sterile Water contained in either a flexible bag or rigid spikable bottle

- 1 L and 2 L options

Used for active humidification on:

- Invasive Ventilator
- Non-Invasive ventilator
- High Flow Oxygen Therapy

System patible with Neptune Concha

Hanging bottles used with Vapotherm need an adapter (supplied by Vapotherm)

Product Codes: 2D0735X, 2D0737, CHB0010, CHB0020

Cross Sell: AH Circuits, filters, HFNC, NIV



Flex Bag



Hanging Bottle

Competition



- Sensimedical
 - Flex bags only
- Amsino
 - Bottles only
- Medline
 - Private label from Amsino for hanging bottles
 - Neptune Heater/Concha system
 - Bottles are proprietary
 - Two spikes
- Irrigation Water - used for inhalation
 - Baxter
 - Hospira
 - B Braun



Competitive Landscape

	AirLife	Medline	Sensimedical	Amsino	Cardinal & McKesson	Pharma Companies
Inhalation	Yes Flexbags & Bottles	Yes	Yes 1L and 2L flex bags	Yes 500 mL, 750 mL and 1 L bottles	No	Irrigation Water
Large Volume Nebs	Yes Water & Saline 500 mL & 1 L	Yes Water & Saline 440, 760, 1070 mL	No	Yes Water 500 mL – 1 L	No	No
Bubble Humidifiers	Yes 500mL	Yes 340, 540, 650 mL	No	Yes 350, 550 mL	Yes	No
Irrigation	Yes 110mL	Yes Cups & Bottles 100 mL – 1 L	No	No	Yes Cups & Bottles 100 mL – 1 L	No
Modudose (Unit Dose)	Yes Water & Saline 3, 5, 15 mL	Yes Water & Saline 3, 5, 15 mL	No	Yes Saline 3, 5, 15 mL	Yes	No

Water: Contracts

Neal Harpstrite	56040	National	Respiratory, Humidification and Irrigation	2/28/2026	Multi	Sterile Water and Accessories
Kellie Vande Woude	PP-NS-1732	Premier	Active Humidification Devices and Accessories	8/31/2026	Multi	Circuits and Inhalation/Sterile Water
Derrick Tsou	VYAIR-0147136	National	Active Heat and Humidification	3/31/2025	Multi	Inhalation Water
Kellie Vande Woude	PP-NS-1732	Alliant	Active Humidification Devices and Accessories	8/31/2026	Multi	Circuits and Inhalation/Sterile Water



INTERNAL USE ONLY

Sterile Water & Saline: Highest Volume SKUs

- 2D0737 | WATER STERILE F/INHALATION 2000ML 6/CS
- 2D0735X | WATER STERILE F/INHAL FLEX 1000ML 14/CS
- CHB0010 | WATER STERILE IN HANGING BOTTLE 1000ML
- 002620 | HUMIDIFIER KIT 500ML 12/CS
- CK0010 | NEB KIT W ADAPTER STERILE WATER 1000ML
- CN0005 | WATER STERILE FOR INHALATION 500ML
- 116 | BALLARD SNGL DOSE SAL VIALS PNK,15ML,144
- CK0005 | NEB KIT W ADAPTER STERILE WATER 500ML
- AL4109 | SALINE 0.9% DUALTOP PLAST BT 110ML 25/CS
- CHB0020 | WATER STERILE IN HANGING BOTTLE 2000ML

Sterile Water & Saline: Questions to Ask

- Are you throwing away water?
- Can we help ensure you have access to the right sizes?
- Are you purchasing on contract and can we place a bid for your business?

Water: Key Selling Points

Contract Position

One of the most complete lines in the industry

***Prime Targets**

**Vizient Captis & MS Commit sole source Contract
1001353**

Resources:

- Humidification Lit Sheet



Non-Invasive Ventilation

INTERNAL USE ONLY

Non-Invasive Ventilation (NIV)

Providing Positive Airway Pressure Without Using an Endotracheal or Trach Tube



Overview

- Initiated during acute or weaning phase
- Mask interfaces vary
- [Non Invasive Ventilation: Educational Video – YouTube \(14:24\)](#)

Intent

- Avoid intubation/mechanical ventilation
- Improve gas exchange
- Minimize ventilator induced lung injury and infection

AirLife Portfolio

Adult Full-Face Mask



Adult Nasal Mask



Elbow Color	Description
Clear	Vented + AAV
Light blue	Non-vented + AAV
Dark blue	Non-vented no AAV

Elbow Color	Description
Clear	Vented + AAV
Light blue	Non-vented + AAV

Non-Heated NIV Circuit

Universal circuit (Adapts to vented or non-vented mask with AAV))

Single limb

Smooth bore

Disposable

- Filter optional
- Exhalation port and cap (active or not active)
- Pressure line tubing
- 22mm connector for non-vented mask attachment



Part	Description	Quantity
003769	Without respiratory filter	10/case
003770	With respiratory filter	10/case

Adult NIV Heated Circuit

Single limb

Disposable

7-day duration of use

Water chamber optional



Product # AH219 or AH119

Manufacturer	Vyaire Medical	Fisher & Paykel		Philips Respironics			ResMed	
	AirLife	Freemotion	NEW! Nivairo (510k - Aug 2017)	Performatrak	AF531-series	AF541-series	AcuCare	
								
Number Sku's	15 masks	11 masks	8 masks	15 masks	32 (27 masks & 5 elbows)	41 (24 masks w/ headgear, 4 over-nose cushions, 3 under-nose cushions, 4 elbows, & 6 headgear)	11 (9 masks and 2 headgear)	
Sizes	S, M, L	S, M, L	XS, S, M, L	S, M, L	S, M, L	S, M, L, XL	S, M, L	
Mask Seal Style	under the lip	under the chin	under the lip	under the lip	under the lip	under the lip	under the lip	
Elbow Options	Vented (AAV)	Yes (NIV040/NIV042)	Yes (RT040/RT042)	No	No	Yes (Leak 2)	Yes (Leak 2)	Yes (6070X)
	Non-vented (AAV)	Yes (NIV043/NIV044)	Yes (RT043)	Yes (RT045)	Yes (EE/Leak 1)	Yes (Leak 1)	Yes (Leak 1)	Yes (6072X)
	Non-vented	Yes (NIV041)	Yes (RT041)	Yes (RT046)	Yes (SE)	Yes (SE)	Yes (SE)	Yes
Features & Benefits	1) flexible elbow, 2) soft flexible mask and cushion, 3) large, soft, silicone forehead pad for stabilization; 3) Quick clips for easy removal and re-fitting	1) Glider allows the mask to slide at nose minimizing torque on cushion/face	1) Seal adjusts and "rolls" at bridge of nose to reduce pressure; 2) "Tubefit" channels in cushion to improve seal around feeding tubes; 3) Offers an XS size; 4) Clips on both sides for ease in removal	1) Comfortable seal; 2) Clips for easy removal	1) Multiple elbows for multiple uses; 2) Can use on patients 7 yrs or older and > 20 kg (40 lb). 3) CapStrap headgear lifts mask off face	1) Two mask cushions to move touchpoints on face - rotate regularly (Q4H); 2) Multiple elbows for multiple uses; 3) Can use on patients 7 yrs or older and > 20 kg (40 lb).	1) Dual wall cushion for seal and comfort	
Market Price (ASP)	\$21 - \$22	\$21 - \$22	TBD	\$24 - \$25	\$23 (capstrap) - \$27 (4-point)	\$25-\$26 (mask) + \$8 (under nose cushion) = \$33-\$34	\$21 - \$24	
Weaknesses		1) Hard shell and elbow (no flex) may create pressure points when patient moves or circuit pulled; 2) Under the chin design can create rubbing between cushion and face when patient talks. 3) Nasal mask only available in two sizes ... medium and large.	1) Hard shell and elbow (no flex) may create pressure points when patient moves or circuit pulled; 2) Only offer nonvented mask option (requires an exhalation valve in the NIV circuit; 3) No forehead cushion to help stabilize mask and maximize touchpoints; 4) No nasal mask options (must use Freemotion nasal mask)	1) Hard shell and elbow (no flex) may create pressure points when patient moves or circuit pulled; 2) Forehead pad made of foam and may not be comfortable over long time use	1) Hard shell and elbow (no flex) may create pressure points when patient moves or circuit pulled; 2) Forehead pad made of foam and may not be comfortable over long time use; 3) Stocking and managing multiple elbows	1) Time needed to change-out masks; 2) Expectation of consistent change-out for addtl cost?; 3) Need to stock large number of sku's (cost to stock and manage)	1) Hard shell and elbow (no flex) may create pressure points when patient moves or circuit pulled; 2) No stabilizing forehead pad	

	Philips	Resmed	F&P	Intersurgical and Hamilton	Drager	Medline
Comparable product	AF421	AirFit F20	Nivairo/Visairo	BiTrac Select	ClassicStar Plus	Flex NIV
Sizes	FF - 4 sizes (XL)	FF - 3 sizes in both male and female options	Nivairo FF - 4 sizes (XS) (Visairo bridge free nasal - 3 sizes)	FF & Nasal - 4 sizes (XL)	FF & Nasal- 4 sizes (XL)	FF & nasal- 3 sizes
Insert	Silicon	Silicon	Silicon	Silicon	Silicon	Silicon
Adjustable Forehead/Nose bridge	YES (add additional pads)	N/A	NO	YES	YES	YES
360 Elbow Rotation		YES	Dual Swivel	NO	YES	Dual Swivel
Magnets	NO (plastic clips)	YES	NO (plastic clips)	NO (plastic clips)	NO (plastic clips)	NO (plastic clips)
Bridgeless options	YES (2 X total face)	YES (market leader in comfort and bridge free options)	YES (full face bridge free, optiflow NHF as nasal rest option)	YES (total face, hood) avail in pedi	YES (total face, nasal pillows)	**



INTERNAL USE ONLY

	Philips	Resmed	F&P	Intersurgical and Hamilton	Drager	Medline
MiniMe 2	NO	NO	NO	YES	YES	YES
Pediatric other	YES AF421 (PerforMax total face, PN841 nasal mask)	YES (Pixi)	NO	YES (total face mask, hood)	NO	**
Infant		YES	YES -Neo (Flexitrunk)	YES (hood)	YES (nasal and bubble)	**
Key Points	Market leader Some masks have available O2 ports	AirFit F20 Fits 96.5% of all pt.'s Additionally has most versatile offering, high quality and comfort minded	Offers circuits for all patient groups as well as HFNC for bridge rest Offers TubeFit- allowing seal around NG/OG without leak	Interchangeable elbows for vented/non-vented etc. and offer available Aerogen port and/or bronchoscopy access	Does NOT offer flexible 3 rd plane	FlexiPlane technology flexes 3 rd plane ** does not manufacture, DOES Distribute
Other Full-Face and Nasal options	AF531, AF541 FF, AF811 gel mask, PerformaTrak foam forehead pads	AirFit F40 bridgeless full-face mask AirTouch- memory foam cushion AirTouch N30i bridgeless nasal AirFit X30i hybrid AirFit P10	NO	VariFit- gel-cushion w/360-degree rotating elbow	FitStar gel-cushion w/built in O2 port	**



INTERNAL USE ONLY

Competition

- Philips Respironics - Market Leader****
 - [NIV Mask Fitting: Philips Respironics noninvasive hospital mask – YouTube](#)
 - (14:05)
- ResMed
- Fisher/Paykel
- Hamilton – Pulmodyne
- Intersurgical
- Draeger
- Medline

NIV: Contracts

Kellie Vande Woude	PP-NS-1773	Premier	NIV Disposables	4/30/2026	Multi	
Derrick Tsou	VYAIR-0158185	National	Respiratory Therapy	3/31/2025	Multi	AirLife Open, Misty Fast, ET CO ₂ Cannula, O ₂ Mask/Tubing, HFNC, NIV Masks, Nebulizers
Kellie Vande Woude	PP-NS-1773	Alliant	NIV Disposables	4/30/2026	Multi	



INTERNAL USE ONLY

NIV: Highest Volume SKUs

- NIV040M | MASK, NIV FULL FACE, VENTED, MED W/AAV
- NIV043M | MASK, NIV FULL FACE, NONVENTED, MED W/AAV
- NIV040S | MASK, NIV FULL FACE, VENTED, SMALL W/AAV
- NIV043L | MASK, NIV FULL FACE, NONVENTED, LRG W/AAV
- NIV040L | MASK, NIV FULL FACE, VENTED, LARGE W/AAV
- NIV043S | MASK, NIV FULL FACE, NONVENTED, SM W/AAV
- NIV041M | MFULL FACE MASK NON-VENTED MED
- NIV042M | MASK, NIV NASAL, VENTED, MEDIUM W/AAV

NIV: Questions to Ask

- How do you handle skin breakdown / pressure sores?
- What challenges have you experienced with NIV mask?
- What are the pros/cons of your current products?

NIV: Key Selling Points

Elbow rotates 360 degrees and has soft material around it which flexes with circuit to reduce torque on mask, reduce skin pressure, mask movement, and reduce chance of machine disconnection

Can easily wear glasses with our NIV masks

AirLife NIV masks are very light and utilize quick/easy clips for ease of use

MiniMe mask (peds) soft blue gel air technology allows for shaping comfortably to the patient's face

Hard shell on outside, soft silicone on inside to conform to face, form seal, ensure comfort, and reduce need to overtighten mask.

NIV: Key Selling Points

Soft Silicone on the forehead piece

***Prime Targets:**

On Ascension, Premier contracts

Accounts with skin breakdown issues

- **Sole source Encompass Health (Vizient)**

Resources:

- NIV Brochure
- NIV Sizing Guide
- NIV Poster
- NIV Playbook
- NIV Matrix

NIV: Objection Handling

You don't have neo/infant size NIV masks

Currently we don't offer these sizes but are always actively looking for ways to fill these gaps. For adult and pediatric patients, our options have excellent benefits to offer those patients.



Airways

INTERNAL USE ONLY

Market Dynamics Overview

Total Market Size:

- Total Addressable Market - \$1.6B
 - Domestic - \$472M
 - International - \$1.2B
- Market Leaders (Domestic)
 1. Medtronic - \$179M and 38%
 2. Teleflex - \$42M and 9%
 3. Intersurgical - \$14M and 3%

AirLife Market Share (TTM):

- AirLife Market Share - \$ 28.4M and 2%
 - Domestic - \$15.7M and 3%
 - International - \$12.7M and 1%

Head Winds:

- Airway products from 3rd party Chinese suppliers – potential tariffs
- GPO contracts centered on Shiley
- EMS market pre-conditioned to use SGA with strap
- INTL market bids for “gel based SGA”
- Lack of evidence on desired claims

Tail Winds:

- AirLife transitioning away from DEHP in ETTs by end of 2026.
- MICROCUFF profit improvement – GP% 46% to 78%
- Premier and Vizient contracts now in place
- Air-Q3 and Microcuff are differentiated products

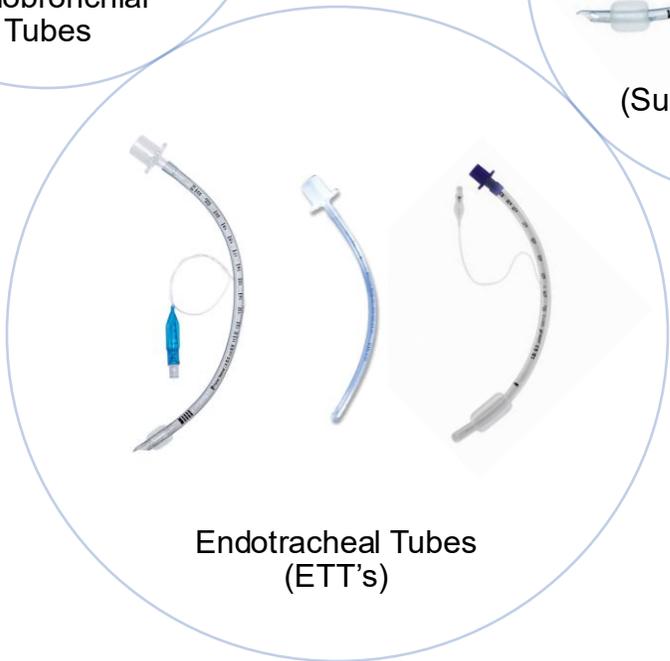
AirLife Airways Products



Endobronchial Tubes



Trach-Vac
(Sub-Glottic Suction)



Endotracheal Tubes
(ETT's)



Supraglottic Airways
(SGAs)



Oropharyngeal Airways
(OPA's or Oral Airways)



Nasopharyngeal Airways
(NPA's or Nasos)

Oropharyngeal (Oral) Airways

- **Intended use:** To establish and maintain an airway by stopping the tongue from covering the epiglottis.
- **Common locations:** Crash carts, ED, EMS
- Commodity product
- All styles color-coded by size (ISO Standard)
- Built in bite block



Guedel

PVC Guedel

Berman

Williams/Ovassapian

Polyethylene

PVC

Polyethylene

Guides FO bronchoscopy placement

Clear

Vented Septum

Nasopharyngeal Airways (Nasos)

- **Intended use:** Inserted into the nose and through the posterior pharynx, clearing the airway by displacing the posterior tongue and soft palate. Nasos avoid the gag reflex and advantageous for patients with mouth trauma.
- **Common locations:** Crash carts, ED, EMS



Parker PVC	SunMed PVC	Robertazzi	Adjustable	Latex Robertazzi
Parker Flex-Tip	Blunt tip	Silicone (latex free)	Neoprene (latex free)	Latex (smooth)
15mm standard connector	15mm standard connector		Adjustable flange Blunt tip	(Trumpet)

Endotracheal Tube Products



Microcuff

- Patented 10-micron thin PU cuff to create a superior seal and reduce micro-aspiration.
- Adult Oral-Nasal, Ped Oral-Nasal, Ped RAE
- **ASP: \$10.98/each**

(for adult oral/nasal)



Parker Flex-Tip

- Patented tip design to help avoid airway collisions and provide a smooth intubation
- Broad variety of tube & cuff styles
- **ASP: \$2.01/each**

(for basic style high-volume, low-pressure cuff)



SunMed Standard

- Basic tube to offer a cost-friendly option with reliable quality
- Fewer tube styles than Parker, but often more size ranges
- **ASP: \$1.24/each**

(for basic style high-volume, low-pressure cuff)

INTERNAL USE ONLY

PREMIER ENDOTRACHEAL TUBES COMPETITIVE COMPARISON

CONTRACTED VENDOR: #PP-OR-2490

FLEX-TIP®



MARKET POSITION

- High quality design with competitive pricing

KEY FEATURES

- Advanced Flex-Tip for smooth intubation and reduced trauma
- Pre-styletted version offers excellent value

LIMITATIONS

- Slightly higher initial cost than **Sourcemark**
- Primarily for standard intubation use

SUNMED®



MARKET POSITION

- Cost-effective alternative with the same quality as **Sourcemark's** standard ETT

KEY FEATURES

- Comprehensive range of cuffed and uncuffed tubes
- Much lower cost than **Shiley**

LIMITATIONS

- No premium features like **Flex-Tip** or **MICROCUFF**
- Positioned as a value line, with fewer innovations.

MICROCUFF®



MARKET POSITION

- Premium product for specialized needs, especially pediatrics

KEY FEATURES

- 10-micron thin polyurethane cuff for superior seal and safety
- Ideal for delicate procedures and pediatric use

LIMITATIONS

- Higher price, but value comes from improved patient safety
- Best suited for critical patients, pediatric patients, and patients intubated long-term

SHILEY™



MARKET POSITION

- 65% market share, widely used by Premier members

KEY FEATURES

- TaperGuard Cuff
- Enhanced lung protection, reduced sore throat, and lower tracheal wall pressure (Shiley claims)

LIMITATIONS

- High price with similar functionality to standard cuff tubes
- No major advantages over more affordable options

SOURCEMARK®



MARKET POSITION

- Budget-friendly option for standard ETTs

KEY FEATURES

- Wide variety of cuffed and uncuffed PVC tubes (standard, oral, nasal, reinforced)
- Pre-loaded stylet options

LIMITATIONS

- Identical to **SunMed** ETTs but without the premium quality
- Lacks specialized/advanced features

Description	Qty per box	Size (mm) and CFN																	Parker Cross	SunMed Cross	
		Pediatric									Adult										
		2.0	2.5	3.0	3.5	4.0	4.5	5.0	5.5	6.0	6.5	7.0	7.5	8.0	8.5	9.0	9.5	10.0			
Subglottic Suction																					
Shiley evac oral ETT with TaperGuard cuff, Murphy eye	10									FT			H-SFTVVC	No Cross							
Shiley evac oral ETT with TaperGuard cuff, Murphy eye, and pre-loaded stylet	10																		No Cross	No Cross	
Shiley Seal Guard evac oral/nasal ETT with TaperGuard cuff, Murphy eye	10									FT			H-SFTVPU	No Cross							
Basic Cuffed																					
Shiley oral/nasal ETT with TaperGuard cuff, Murphy eye, and pre-loaded stylet	10			SM	SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	SM	H-PFST	1-7343-
Shiley oral/nasal ETT with TaperGuard cuff, Murphy eye	10		SM	SM	SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	SM	H-PFHV	1-7333-
Shiley Seal Guard oral/nasal ETT with TaperGuard cuff, Murphy eye																					
Shiley Hi-Lo oral/nasal ETT, intermediate, cuffed, Murphy eye	10			FT			H-PFLP	No Cross													
Shiley, Hi-Lo oral/nasal ETT, cuffed, hooded Murphy tip, Murphy eye	10		SM	SM	SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	SM	H-PFHV	1-7333-
Basic Cuffless																					
Shiley oral/nasal ETT, cuffless, Murphy eye	10	SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM								H-PFUO	1-7330-
RAE cuffed and cuffless																					
Shiley oral RAE ETT with TaperGuard cuff, Murphy eye	10					FT SM			H-PFOC	1-7321-											
Shiley oral RAE ETT with Hi-Lo cuff, Murphy eye	10					FT SM			H-PFOC	1-7321-											
Shiley nasal RAE ETT with TaperGuard cuff, Murphy eye	10					FT SM	FT	FT				H-PFNC	1-7323-								
Specialty cuffed and cuffless																					
Shiley oral/nasal reinforced ETT cuffed, Murphy eye	5				SM	SM	SM	SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	FT SM	SM	H-PFRU	1-7363-
Shiley oral/nasal reinforced ETT cuffless, Magill tip	5			FT	FT	FT	FT	FT												H-PFRC	No Cross
Shiley laser oral ETT, Dual -cuffed, Murphy eye	5																			No Cross	No Cross
Shiley laser ETT, cuffless, Magill Tip	5																			No Cross	No Cross
Shiley microlaryngeal oral/nasal ETT, cuffed, Murphy eye	10					FT		FT		FT										H-PMLT	No Cross

Supraglottic Airways (SGAs)



SunMed Laryngeal Mask
1-2021-xx
1-0372-xx



Parker Laryngeal Mask
H-PLMD-xx
H-PLMDR-xx



Air-Q®



Air-Q®3

Generation 1

Generation 2

Supraglottic Airways (SGAs) – Gen 2

Size	Air-Q®3	Air-Q®sp3	Air-Q®3G	Air-Q®sp3G
0	 30005	 40005	 50005	 60005
0.5	30055	40055	50055	60055
1	30105	40105	50105	60105
1.5	30155	40155	50155	60155
2	30205	40205	50205	60205
3	30305	40305	50305	60305
4	30405	40405	50405	60405
5	30505	40505	50505	60505
	<ul style="list-style-type: none"> • Single tube with integrated bite block • Manual inflation with pilot balloon <p>Focus Areas:</p> <ul style="list-style-type: none"> • Operating Room • Short procedural areas <p>ASP: \$8.00/each</p>	<ul style="list-style-type: none"> • Single tube with integrated bite block • Self-pressurizing mask <p>Focus Areas:</p> <ul style="list-style-type: none"> • Operating Room • Short procedural areas • Emergency Department • Acute care floors, ICU <p>ASP: \$7.87/each</p>	<ul style="list-style-type: none"> • Dual gastric channels with integrated bite block • Manual inflation with pilot balloon <p>Focus Areas:</p> <ul style="list-style-type: none"> • Operating Room • Short procedural areas • Emergency Department • Acute care floors, ICU • EMS <p>ASP: \$10.57/each</p>	<ul style="list-style-type: none"> • Dual gastric channels with integrated bite block • Self-pressurizing mask <p>Focus Areas:</p> <ul style="list-style-type: none"> • Operating Room (if using iGel) • Short procedural areas • Emergency Department • Acute care floors, ICU • EMS <p>ASP: \$10.36/each</p>

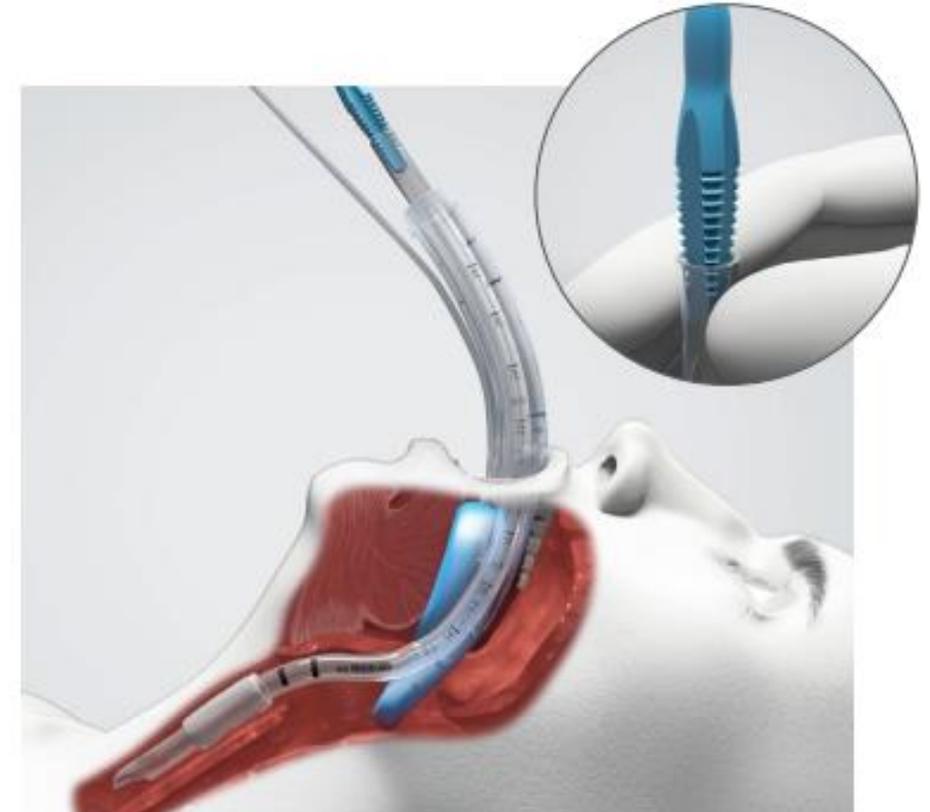
Air-Q3 Exchangers (Removal Stylets)

- Air-Q3's only accessory!
- Sold separately in packs of 10
- Used to aid in removing the Air-Q3 post endotracheal tube intubation
- Disposable *only*



DISPOSABLE REMOVAL STYLETS

ITEM	STYLET SIZE	AIR-Q3 SIZE	MAXIMUM OETT	WEIGHT	PK
10-1006	00	0 - 1.5	4.5 mm	4 - 17 kg	10
10-1005	0	2 - 3	6.0 mm	17 - 60 kg	10
10-1004	1	4 - 5	9.0 mm	> 60 kg	10



SGA Competitor Matrix



AuraStraight



LarySeal Clear



LMA Unique



Solus



AuraGain



LarySeal Pro



LMA Supreme



iGel

SGA Competitor Matrix

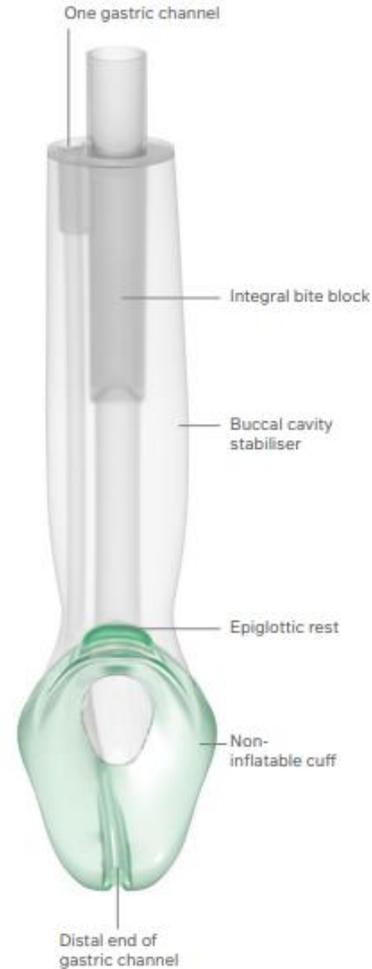
Company	Brand	SGA Generation	Competitor Features	AirLife Strategy
	Standard LMA/SGA	1	Low-Cost, available anywhere	SunMed LMA at comparable low-cost
AMBU	AuraGain	2	Low-cost with decent quality, Anatomically curved, gastric access, ability to intubate, MR safe	Air-Q3G
	AuraStraight	1	Easy glide, extra soft, MR safe, phthalate free, use in OR and emergency medicine	Air-Q3 or SunMed LMA based on cost concerns
Teleflex	LMA Supreme	2	Gastric access, effective 'First Seal™' and innovative Second Seal™ (which minimizes gastric insufflation)	Air-Q3G or Air-Qsp3G
	LMA Unique	1	Versatile, single use, aperture bars, soft, flexible cuff	Air-Q3 or SunMed LMA based on cost concerns
Flexicare	LarySeal Pro	2	Integrated suction catheter port, ability to intubate, bite guard, epiglottic flap	Air-Q3G
	LarySeal Clear	1	Satin finish PVC, crush resistant, color-coded balloon, clear view	Air-Q3 or SunMed LMA based on cost concerns
Intersurgical	iGel	2	Non-inflating cuff (1 st and only), gastric access, ability to intubate	Air-Qsp3G
	Solus	1	Lower end line, 4 versions, including Satin, MRI, curved & flex	Air-Q3 or SunMed LMA for flex models

Air-Q3 vs. i-gel

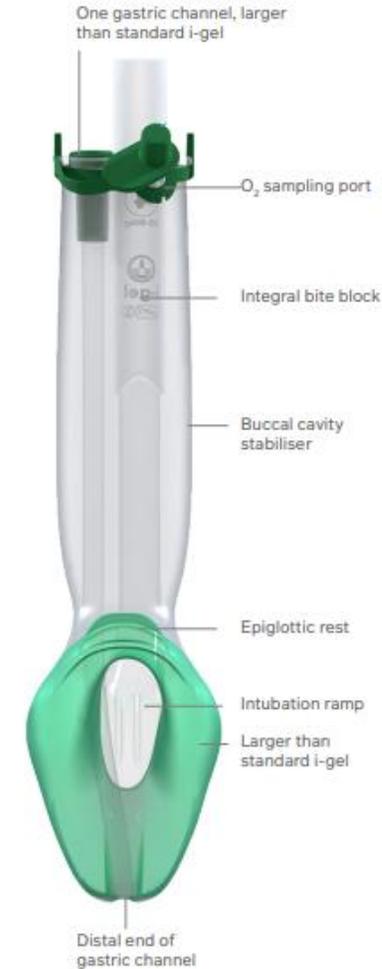
Air-Q[®]3
(pictured Air-Q[®]3G)



Standard i-gel[®]



i-gel[®] Plus



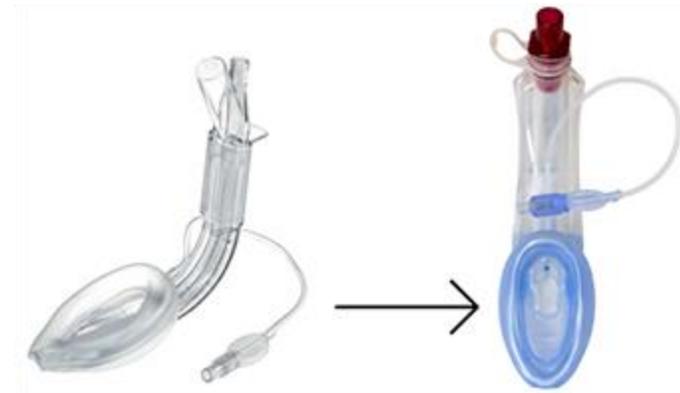
Air-Qsp3G Compared to i-gel

Feature	Air-Qsp3G	i-gel
Cuff Characteristics	Self - pressurizing cuff, automatically adjusts pressure, and the silicone material causes less irritation. Air-Qsp3 cuff seals instantly.	Non - inflatable cuff, sealed with thermoplastic elastomer, and has relatively weak flexibility in pressure adjustment. Cuff must warm up to body temperature in order to properly seal. If the cuff is cold, sealing can take up to 20 minutes.
Tube Shape	Anatomically correct curved tube. The curved tube helps the cuff seal better and prevent airway from “popping out” of the patient. Does NOT require a strap to maintain seal.	Very straight tube which causes i-gel to “pop out” of the patient’s mouth. i-gel requires a strap to hold down the airway and maintain the seal.
Intubation Assistance	Equipped with an ETT ramp to assist intubation.	Only i-gel PLUS has intubation ramp. Original i-gel does not.
Gastric Tube Channel	Wide dual gastric tube channels, can accommodate large - diameter gastric tubes, and has a pressure relief system. Large gastric channel opening at distal end of mask. Allows for large amounts of fluids to suction through.	Single gastric channel with smaller diameter which limits the NG tube size that can be inserted. Small gastric opening at distal end of mask.
Connection and Fixation	Color - coded connector for easy identification and stable structure. Connector is removable which allows for larger ETT to be inserted.	15 mm connector is not removable. Limits size of maximum ETT to intubate with.

Comparison to Teleflex SGA's



Teleflex Unique (left) / Air-Q3 / Parker SGA



Teleflex Supreme (left) / Air-Q3

Air-Q3G Compared to Ambu AuraGain



Feature	Air-Q3G	AuraGain
Cuff Characteristics	<p>Anatomically shaped cuff has a built-up heel to assist with sealing the airway. 100% silicone material causes less irritation and requires less lubrication than PVC.</p> <p>Self-pressurizing cuff option is available with Air-Qsp3 and Air-Qsp3G.</p>	<p>Simple PVC cuff is similar to a generation 1 LMA cuff. Manual inflating cuff options only.</p>
Tube Shape	<p>Anatomically correct curved tube. The curved tube helps the cuff seal better and prevent airway from “popping out” of the patient. Does NOT require a strap to maintain seal.</p> <p>Tube is made of silicone which holds its shape but is gentle on the airway tissue and requires less lubrication than PVC.</p>	<p>Stiff PVC tube with rigid curve.</p>
Intubation Assistance	<p>Equipped with an ETT ramp and epiglottis elevator to assist intubation.</p>	<p>No intubation assistance.</p>
Gastric Tube Channel	<p>Wide dual gastric tube channels, can accommodate large - diameter gastric tubes, and has a pressure relief system.</p> <p>Large gastric channel opening at distal end of mask. Allows for large amounts of fluids to suction through.</p>	<p>Single gastric channel with smaller diameter which limits the NG tube size that can be inserted. Small gastric opening at distal end of mask.</p>
Connection and Fixation	<p>Color - coded connector for easy identification and stable structure.</p> <p>Connector is removable which allows for larger ETT to be inserted.</p>	<p>15mm connector is not removable. Limits size of maximum ETT to intubate with.</p>

Airways Competitive Landscape

	AirLife	Medtronic	Teleflex	Intersurgical
Endotracheal Tube	Microcuff Parker Flex-Tip Endobronch Trach-Vac Subglottic Suction SunMed Conventional ETT	Shiley TaperGuard Cuff Shiley SealGuard Cuff Shiley Evac Laser Tubes	Sheridan Standard ETT	InTube Tracheal Tube (standard ETT)
SGA	Gen 1 (SunMed/Parker LMA) Gen 2 (Air-Q) Gen 3 (Air-Qsp3G)	–	Gen 1 (LMA Unique) Gen 2 (LMA Supreme, Fastrach)	Gen 1 (Solus) Gen 3 (i-gel Plus)
Other Tubes	Tracheostomy	Shiley Endobronchial Tubes (w/ CPAP system) Shiley Tracheostomy Products	Rusch EZ-Blocker Endobronchial Sher-I-Bronch Endobronchial Tube Metal Tracheostomy Tube (w/ inner/outer cannula)	–
NPA/OPA	Robertazzi (Neoprene -> Silicone) Neoprene Adjustable Robertazzi PVC NPA Color-Coded Guedel & Berman	PVC NPA	Adjustable Flange NPA (MEDIPRENE®, Silkolatex™, “Red Rubber”, PVC) Color-Coded Guedel & Berman	Color- Coded Guedel
Securement	Vyaire Tracheostomy Tie	–	–	i-gel Strap (kitted with airway)

Airways Competitive Pricing

	AirLife		Medtronic		Teleflex		Intersurgical		
ETT		Low GPO Tier 6	High GPO Tier 1						
	Standard Adult High-Pressure Low-Volume ETT								
	35214 Microcuff Et Tube Adlt Magill, 7mm, CA10	-	\$82.50/cs						
	H-PFHV-70-10 Flex-Tip, Cuffed, 7.0mm, CA10	\$13.50/cs(T4)	\$18.00/cs	Standard Adult HPLV ETT	Clarivate ASP	Standard Adult HPLV ETT	Clarivate ASP	Standard Adult HPLV ETT	Clarivate ASP
	1-7333-70 SunMed ETT Cuffed 7.0mm, CA 10	\$10.11/cs(T4)	\$11.20/cs	86111 Shiley ETT Cuffed, 7.0, BX10	\$1.51/ea	5-10314 Sheridan/HVT, 7.0, BX10	\$1.49/ea	8040070 InTube Tracheal 7.0	-
	Pediatric/Specialty ETT			86450 Shiley Intermediate, 7.0, BX10	\$1.48/ea				
	35112 Microcuff Et Tube Ped Magill, 3.5mm, CA10	-	\$82.50/cs						
	H-PFNC-45-5 Parker Nasal RAE, Cuffed, 4.5mm	\$14.31/cs(T4)*	\$23.41/cs*						
1-7323-45 SunMed Preformed Nasal, 4.5mm	\$39.71/cs(T4)*	\$42.00/cs*							
SGA	Gen1 SGA								
	1036040 Ultra Clear Size 4, CA10	\$62.08/cs(T3)	\$76.86/cs			Gen 1 SGA	Clarivate ASP	Gen 1 SGA	Clarivate ASP
	H-PLMD-40-5 Parker LMA, Silicone, Sz4, CA5	\$31.04/cs(T3)	\$38.43/cs			105200-000040 LMA Unique, Sz4	\$6.51/ea	8004003 Solus sz4	\$5.57/ea
	1-2021-04 Sunmed LMA - Pvc Disp, Sz4, CA10	\$41.80/cs(T3)*	\$46.75/cs*	-		Gen2 SGA		8004001 Solus Reinforced	\$11.95/ea
	Gen2 SGA					ALBF040SU LMA Supreme, Sz4	\$20.71/ea	Gen2 SGA	
	30405 Air-Q3 w/ Manual Cuff sz4, CA10	\$71.48/cs(T3)	\$79.94/cs					8203000 I-GeI SGA Sz3	\$6.51/ea
	60405 Air-Qsp3G w/ sp and GA, sz4, CA10	\$103.00/cs(T3)	\$130.57/cs						

*Not on GPO contract



INTERNAL USE ONLY

Air-Q3: Contracts

Blair Hobgood	RESP54	Partners Cooperative	Laryngeal Masks/Supraglottic Airways	9/14/2027	Multi	Air-Q3
Kevin Veenstra	SP020095H5055	DAPA	Respiratory/Airway Disposables	12/31/2025	Multi	Westmed branded. Limited items: Nebs, Comfort Soft Plus, Anesthesia Circuits
Kellie Vande Woude	PP-OR-2214	Premier	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets
Kellie Vande Woude	PP-NS-2214	Acurity	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets
Kellie Vande Woude	PP-OR-2214	Alliant	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets



INTERNAL USE ONLY

ETT: Contracts

Kellie Vande Woude	PP-OR-2490	Premier	Endotracheal Tubes	12/31/2028	Multi	Parker, SunMed, Microcuff, Nasos, Stylets, Intubaid
Derrick Tsou	AVANO-0071057	National	Endotracheal Tubes	6/30/2026	Multi	Microcuff, adult/pediatric endotracheal tube
Kellie Vande Woude		Alliant	Endotracheal Tubes and Related Products	12/31/2028	Multi	Parker, SunMed, Microcuff, Nasos, Stylets, Intubaid
Kellie Vande Woude	CAP-OR-005	Capstone	Endotracheal Tubes and Related Products	8/31/2025	Sole	Capstone-Select: SunMed, Parker branded ET Tubes
Blair Hobgood	RESP39	Partners Cooperative	Endotracheal Tubes	12/31/2025	Multi	Microcuff products - 31001857
Kellie Vande Woude	PP-OR-2490	Yankee Alliance	Endotracheal Tubes	12/31/2028	Multi - Yellow	Parker, SunMed, Microcuf, Nasos, Stylets, Intubaid

Airways: Highest Volume SKUs

- 30405 | (30405) AIRQ3 STANDARD ILA WITH MANUAL CUFF INFLATION SIZE 4.0
- 35111 | MICROCUFF ET TUBE PED MAGILL,3MM
- 35112 | MICROCUFF ET TUBE PED MAGILL,3.5MM
- 30305 | (30305) AIRQ3 STANDARD ILA WITH MANUAL CUFF INFLATION SIZE 3.0
- 35113 | MICROCUFF ET TUBE PED MAGILL,4MM
- 30505 | (30505) AIRQ3 STANDARD ILA WITH MANUAL CUFF INFLATION SIZE 5.0
- H-PLMD-40-5 | PARKER LARYNGEAL MASK DEVICE, DISPOSABLE SILICONE, SIZE 4.0
- 35114 | MICROCUFF ET TUBE PED MAGILL,4.5MM
- H-PSTDL-37-1 | ENDO-BRONCH, STANDARD TIP, DOUBLE LUMEN TUBE, LEFT, 37 FR RES240A
- H-PSTDL-35-1 | ENDO-BRONCH, STANDARD TIP, DOUBLE LUMEN TUBE, LEFT, 35 FR
- 30205 | (30205) AIRQ3 STANDARD ILA WITH MANUAL CUFF INFLATION SIZE 2.0
- 30155 | (30155) AIRQ3 STANDARD ILA WITH MANUAL CUFF INFLATION SIZE 1.5
- H-PFHV-70-10 | ENDOTRACHEAL TUBE, HIGH VOLUME LOW PRESSURE (PFHV), CUFFED, FLEX-TIP, 7.0MM
- 40405 | (40405) AIRQ3 SELF PRESSURIZING ILA WITH AUTOMATIC CUFF INFLATION SIZE 4.0
- H-PFHV-75-10 | ENDOTRACHEAL TUBE, HIGH VOLUME LOW PRESSURE (PFHV), CUFFED, FLEX-TIP, 7.5MM

ETT: Key Questions

- Are you working on infection control projects?
- Can we work these into an Enterprise Agreement for cost savings?
- Would you be open to a product that is easier to intubate with potentially less trauma (Parker)?
- What are you currently using for Supraglottic Airways?
- Do you have a NICU? Do you use supraglottic airways there?

- *Prime Targets
 - ETT / Airways on Premier contract
 - ETT Sept 2025 on Vizient Contract

Air-Q3: Key Selling Points

- Color Coded Connector for easy size identification. Remove to insert larger sized ETT through the Air-Q3 (iGel not removable)
- All Silicone for smoother intubation with less lubricant. Not impacted by temperature or moisture.
- Anatomical Curve designed to follow natural anatomy for easier placement and improved sealing (iGel straighter)
- Dual Gastric Channels (G Models) allow access to stomach via gastric tubes, for easier flow of secretions through catheters as desired.
- Self Pressurizing Mask (SP Models) controlled by inspiratory/expiratory pressure. No manual inflation needed! Prevents consistent pressure on the airway walls. Less internal “bruising.”

Air-Q3: Key Selling Points Continued

- Aperture Hole enables transfer of air if main inlet becomes occluded.
- Epiglottis Elevator guides epiglottis to rise further up, opening the glottis further to improve vocal cord view.
- ETT Ramp angles ETT into correct trajectory to slide between vocal cords.
- i-gel needs to warm up (different time based on temp of patient) to seal the airway whereas the Air-Q3 does not.
- Elevated Mask Seal for a better airway seal
- Neonates: Air-Q3 is only disposable SGA with size 0 and 0.5

Resources:

- Product Brochures
- Air-Q3 JEM Study
- Air-Q3 i-gel Comparison
- [Air-Q3 In-Service Video](#)
(7:12)

Microcuff / Parker: Key Selling Points

- Microcuff: Barrel Shaped Polyurethane cuff is very protective
- Against microaspirations.
- Parker: Comes in PVC or PU cuff
- Parker: Ease of intubation and reduce chance of tracheal trauma
- Excellent position on Premier Contract

Resources:

- [Product Brochures](#)
- Demo/In-Service Video
- [Clinical Studies](#)
- Implementation Guide

Air-Q3: Objection Handling

We don't want to go through the trouble of a house wide conversion

We have implementation, clinical, and sales team support to make it easy for you. We will conduct all education and follow-up.

- **I like my i-gel LMA**
- AirQ-3 has many feature i-gel does not. Epiglottis Elevator, guide ramp, etc. i-gel channel is narrower which makes it trickier to intubate through.

ETT: Objection Handling

- **The Flex-Tip might cause airway trauma.**
- The patented curved design is engineered to reduce friction and trauma by gliding smoothly past the arytenoids and vocal cords—unlike traditional beveled tips that can scrape or catch. Use your palm to slide standard tube and Parker tube across to feel the difference.
- **Flex-Tip: There is a stiffness or the tube “bouncing” off the cords.**
- This is typically felt near the reinforced Murphy eyes, which are designed for added ventilation safety. What feels like a bounce is actually a protective deflection—meant to guide the tube along the airway. The key is to allow the tip to lead using a gentle technique. For clinicians accustomed to rotating a standard bevel tube to enter the cords, it’s helpful to know that the Parker tip already incorporates that rotation, reducing the need for torque.
- **I like my current ET Tubes**
- Do you know if they are on contract? Let’s take a look at price differentials and see if we can save you money or perhaps include them in an Enterprise Agreement. In addition, the Parker tubes are easier to place and reduce chances of tracheal trauma.
- **Microcuff: These ET Tubes are too expensive**
- Studies show that a more protective cuff can reduce infections in patients in the ICU.



Laryngoscopes

INTERNAL USE ONLY

Market Dynamics Overview

Total Market Size:

- Total Addressable Market - ~\$770M
 - Domestic - ~\$70M
 - International - ~\$700M
- Market Leaders (US)
 1. Flexicare - \$26.5M, 38%
 2. Teleflex - \$13.8M, 20%
 3. AirLife - \$10.7M, 16%

AirLife Market Share (TTM):

- AirLife Market Share - \$12.6M, 2%
 - Domestic - \$10.7M, 16%
 - International (if applicable) - \$1.9M, <1%

Head Winds:

- Ongoing quality, accountability and service levels with MD
- Miller blade design deemed “clinically unacceptable” by Nationwide Children’s – working on new product
- Rebranding delayed – Mfr by/for, GTINs, languages are inconsistent and a mess. IFUs as well
- ICE 2.0 move to El Paso, need to set up inspection and secondary ops because above changes are not implemented
- HEINE screen repair costs outrageously high.
- Cost points increasing July 1, will negatively impact handle profitability
- Lack of recording, lack of pediatric slowing us down

Tail Winds:

- Backorders down significantly over prior year
- Miller design re-work nearly complete, awaiting customer feedback
- New agreement in place with MD for improved delivery dates

Revenue /GPOs /Mix

Full line on Premier and Vizient! (No HealthTrust)

US Market Est. Value: \$70M

Total Category: \$7.6M US Revenue

IntuBrite® Dual LED: \$4.2M

IntuBrite Green System: \$0.3M

Everything else: \$3.1M

Flexicare has \$26.5M, 38%

Teleflex has \$13.8M, 20%

Top Rep: Stacy Lieb \$767K

Avg Rep: \$206.5K

			Rev	Units	ASP
Conventional	Reusable	Handle	\$ 10,965	453	\$24.21
		Blade	\$ 8,222	525	\$15.66
	Disposable	Handle	\$1,526,586	336,157	\$ 4.54
		Blade	\$1,952,798	425,770	\$ 4.59
F/O	Reusable	Handle	\$ 97,169	1,627	\$59.72
		Blade	\$ 370,670	6,834	\$54.24
	Disposable	Handle	\$1,282,765	195,269	\$ 6.57
		Blade	\$1,553,181	348,120	\$ 4.46

		Rev	Units	ASP
Conventional	Reusable	\$ 19,298	923	\$20.91
	Disposable	\$4,255,321	847,444	\$ 5.02
F/O	Reusable	\$ 454,020	8,123	\$55.89
	Disposable	\$2,856,555	542,141	\$ 5.27

Reality of Laryngoscopes at AirLife

	IntuBrite		SunMed				GreenLight*		Accessories		
Product	<i>Dual LED</i>	<i>FO</i>	<i>Conv</i>		<i>FO</i>		<i>ISO Green</i>	<i>FO</i>	<i>Conv</i>	<i>FO</i>	<i>Misc.</i>
Picture											
Reusability	D	D	D	R	D	R	D/R	D/R	R	R	R

*GreenLight will be discontinued by 2026

Handles

Various sizes

Reusable vs Disposable

Metal vs Plastic

Green ISO vs Proprietary

Sterile vs Non-Sterile



48 SKUs in our portfolio

Disp ~\$4.50-6.00 EA

Reus ~\$23-60 EA



Blades

Various sizes

Reusable vs Disposable

MOSTLY Metal

Green ISO vs Proprietary

Miller, MAC & Specialty

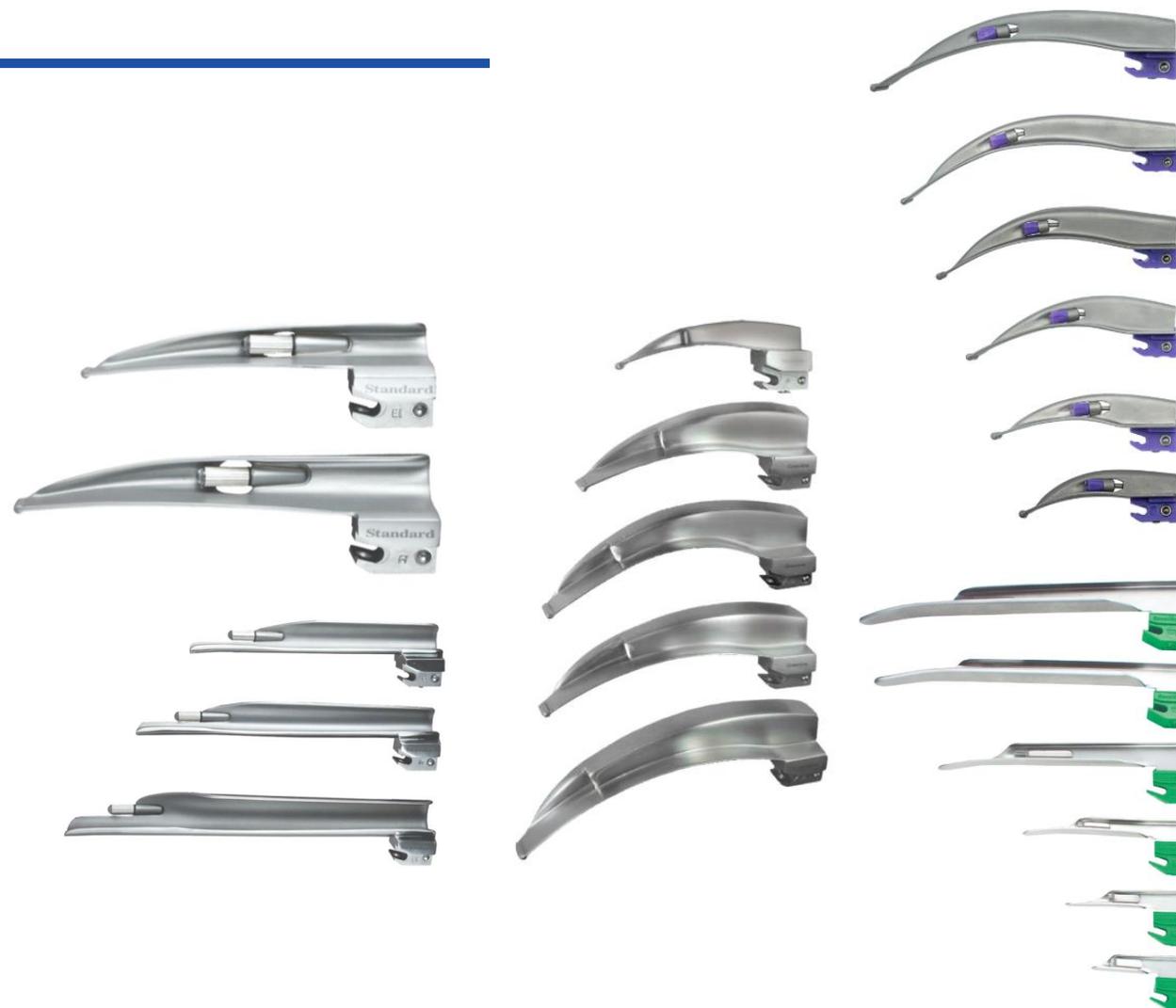
Sterile vs Non-Sterile

German, English, US Profiles (reusable)

200+ SKUs in our portfolio

Disp ~\$6 EA

Reus ~\$38 EA



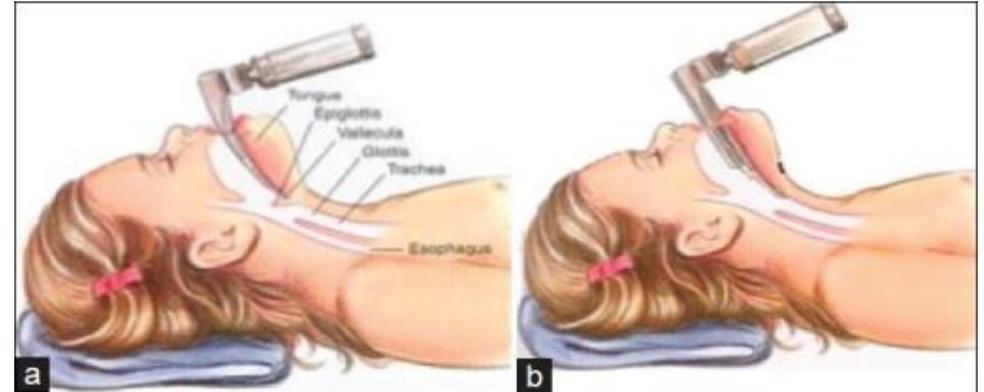
Mac vs. Miller Blades

Macintosh (Curved)

- Designed to sit in the vallecula and indirectly lift the epiglottis
- Most used in adults
- Provides more space during intubation
- Preferred design for video laryngoscopy

Miller (Straight)

- Directly lifts the epiglottis
- Standard for infant and pediatric airways
- Allows better control of the epiglottis
- Requires more precision



https://wikem.org/wiki/File:MAC_MILLER.png

Combos

Various sizes

Disposable ONLY

IntuBrite Dual LED ONLY

Miller, MAC & Specialty

Sterile vs Non-Sterile

44 SKUs in our portfolio

Non-Sterile ~\$9.18

Sterile ~\$12.00 (lower demand)



IntuBrite Dual LED System

UV/White LED lighting technology: Both bulbs in the Blade

Sold separately or blade/handle combo

Available Surgically Clean or Sterile

5-year shelf life (One year sterile*)

Surgical steel blade

3 sizes: Medium, Pediatric, Stubby

Broad blade options

- Mac 0-4, including 3.5
- Miller 000 – 4, including 1.5
- Robert Shaw 0, 1
- Phillips 1,2

Battery life - 2 hours of continuous use



Competition - Flexicare

BritePro Solo (FiberOptic)

- Sold separately or with Blade Combo
- **Sterile**
- 5 year shelf life
- Metal blade with **metal heel**
- Plastic, textured grip handle – 3 sizes: Medium, Pediatric, Stubby
- Blade options
 - Mac 1 – 4 (including 3.5, 2 & 3 strong)
 - Miller 00 – 4 (including 1.5)
 - Philips 1, 2
 - **Kessel 3, 4**
 - **Seward 1,2**
 - Robertshaw 1, 2



Competition - Flexicare

BritePro Omni

- Conventional
- Pinned – cannot separate
- Combo ONLY
- **Sterile**
- Plastic, textured grip handle
- “Advanced” light
- Claims:
 - Quick release battery removal
 - Reduced blade profile
 - MAC -73%, Miller -25%
 - Color coded blade size



Competition - Teleflex

DispoLED handle + Green Rusch Lite Blade

- FiberOptic
- Plastic handle, medium only
- Non-Sterile, 3-yr shelf life
- All metal blades
- Color coded blade packaging
- Standard range of blade sizes
 - Miller 000 – 4 (including 1.5)
 - Mac 0 – 4 (including 3.5)
 - Wis-Hipple 1, 1.5
 - Phillips 1, 2

Green Rusch Lite™ Fiber Optic Laryngoscope Blades

- Solid metal construction from
- Reliable "click" locking mecha
- Anti-glare sheath on light pipe
- Packaging is color-coded by size for easy identification



Competition - Teleflex

Rüsch® Trulite Secure™ Single-Use Laryngoscope Blade and Handle

- Conventional
- Pinned design – cannot separate
- Plastic handle (1 size) with attached metal blade
- Color coded
- Solid metal blades
- Limited Blades:
 - Miller 00 – 4 (not 1.5)
 - Mac 2, 3 4



Competition - Teleflex

Rüsch DispoGrip Single-Use Handle

- 1 size, all plastic with grip
- Available with battery tester – can test battery without removing from package
- Compatible with Standard LED blades



DispoGrip
battery tester

HEINE visionPRO

The HEINE visionPRO video laryngoscope is the evolution of a traditional laryngoscope

It **simplifies routine intubation**, which can help increase their first pass success rate and the end user has significantly fewer “difficult airway” situations. The result is **fewer complications**, which contributes to **enhanced patient safety**.

HEINE visionPRO offers a perfect balance of **sustainability, patient safety and cost-efficiency**.



Medtronic McGrath (market leader)

PROS

- High brand awareness and market penetration
- Well priced for initial investment
- Good Image Quality (new version)
- 3-year Warranty (new version)

Tri-Anim: One Scope

Medline: Intu-Blade



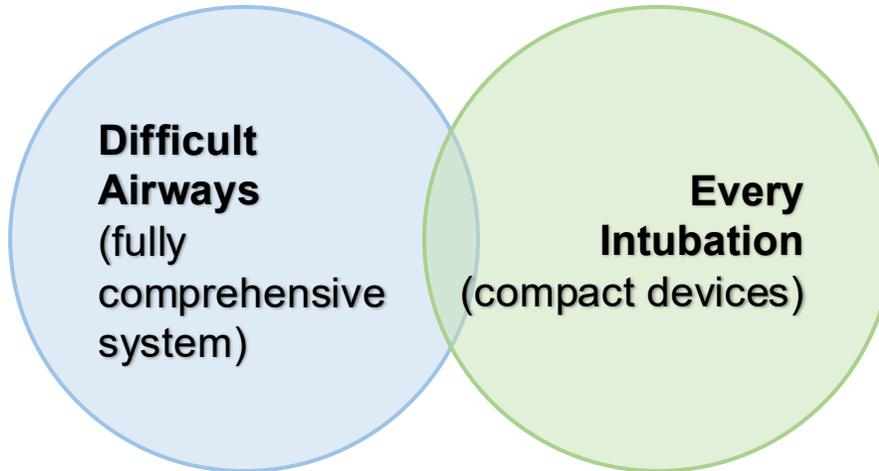
CONS

- 250 min battery, not rechargeable, very expensive component
- X-blade extremely expensive
- Only allows low-level disinfection
 - Hand Sanitizer!!
- Recommends rigid stilet with X blade

Disposable battery (250 min) ~ 50 \$



Competitive Landscape



Medtronic



PRODOL MEDITEC

Airtraq
GUIDED VIDEO INTUBATION

Glidescope Go 2

PROS

- Wide range of blades
- Reputation and Install Base
- Cross compatibility with Spectrum QC, Tower, and Bronchoscope Systems

Glidescope Spectrum™ QC Single-use Video Laryngoscopes



Glidescope Titanium Reusable Video Laryngoscopes



Glidescope Video Baton QC Large with Single-use GVL® Stays



Click or Scan to Learn More



CONS

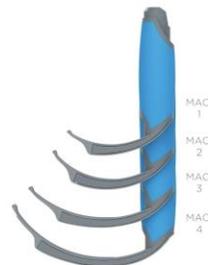
- PRICE!!!
 - \$25-\$35 each blade*
- Skill Degradation
- Rarely used for every intubation
- Incompatible with orig. Glidescope Go or legacy tower system
- Rigid stylet required



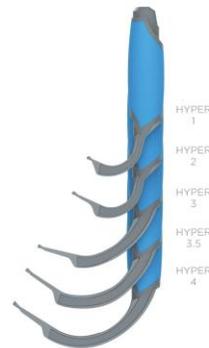
Flexicare ProVu

PROS

- Good screen resolution
 - Poor angulation
 - Highly reflective
- Blade variety and selection
- Similar design features to BritePro Solo



MACINTOSH BLADE



HYPER ANGULATED BLADE

CONS

- Handle Cost is high
 - \$43 list
 - ASP ~ \$20
- Disposable camera
- Poor connection to screen
- High waste
- Feels "cheap"



Direct Laryngoscopy

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	Pakistan /China	High	Premier, Vizient	No Increase
Flexicare	China	High	HPG Sole, Premier, Vizient	No Increase
Teleflex /Rusch	India, Israel	High	Premier	No Increase

Video Laryngoscopy

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife/Heine	Germany	Medium	None	No Increase
Medtronic	Mexico	Medium	All	No Increase
Flexicare	China	Medium	Unknown	No Increase
UEScope	China	Medium	None	No Increase
Verathon	Canada	Low	All	No Increase

Competitive Landscape

	AirLife	Flexicare	Teleflex	Heine
Light System	Conventional (single & dual LED) Fiber Optic (single & dual) Proprietary UV Light	Conventional Fiber Optic	Fiber Optic	Fiber Optic
Reusability	Disposable Reusable	Disposable Reusable	Disposable	Disposable (blade only) Reusable Video
Sterility	Clean Sterile	Clean Sterile	Clean Sterile	Clean
Blade Type and Size	Miller 000-4, including 1.5 Macintosh 0-4, including 3.5	Miller 00-4 Macintosh 1-4 Robertshaw 0-1 Seward 1-2 Wisconsin 0-4 Flexible McCoy Type 3-4	Miller 000-4, including 1.5 Macintosh 0-5, including 3.5 Wis-Hipple 1 & 1.5 Phillips 1 & 2	Miller 00 – 4 Macintosh 0 -5, including 3.5 (reusable only) Paed 0 (reusable only) *Disposable blades are plastic
Handle	2 Material (Chrome & Stainless Steel) Many handle sizes	2 Material (Knurled & Satin) 3 Sizes (Standard, Mini & Stubby)	Offer 1 stand-alone handle Other handles are in combo kit	EasyClean Reusable Handle

Competitive Landscape – VIDEO LARYNGOSCOPES



	VisionPRO (Heine)	McGrath (Medtronic)	Glidescope Go 2 (Verithon)	King (Ambu)	ProVu (Flexicare)
Style	Robust, high-quality image, black recycled material sheaths	All 1 piece, compact design.	2 blade styles: Spectrum QC & Video Baton QC Magnetic connection design	All plastic, cheap, 2 styles	Blade and handle modeled after popular BriteBlade Pro
Reusability	Reusable screen Disposable blade sheaths	Reusable screen Disposable blade sheaths	Reusable screen Disposable blade sheaths	Full disposable version Reusable camera version	Reusable screen Disposable blade/handle
Battery	Rechargeable w/ docking station 240min lifetime	Replaceable McGrath battery pack 250min lifetime	Rechargeable battery 100 min lifetime	AAA batteries 80 min lifetime	Rechargeable battery 60 min lifetime
Screen size	3.2in vertical display	2.5 in vertical display	3.5in landscape touchscreen	2.4in landscape screen	3.5" landscape screen (8" auxiliary screen option)
Blades	4 sizes	5 sizes	11 sizes	10 sizes (including channeled)	9 sizes All metal blade

Competitive Pricing

	AirLife		Flexicare		Teleflex			
	Low GPO	High GPO						
Intubrite	Conventional Disposable	Tier6	Tier1	LED, Combo handle/blade, Sterile, Disposable	Clarivate ASP	LED, Combo handle/blade, Disposable	Clarivate ASP	
	1023.C2015.C Combo Dual Led, Med, Mac 3 (10/cs)	\$79.50	\$112.50	BritePro Omni Standard Handle, Macintosh Blade 3 40040130U	\$9.32	4671003 Rusch TruLite Secure Mac 3	\$9.50	
	2015.C Disposable Handle Dual Led Medium (20/cs)	\$78.00	\$111.80	Fiber Optic Disposable (BritePro Solo)	Clarivate ASP	Fiber Optic Disposable	Clarivate ASP	
	1023.C Disposable Blade Dual Led Mac 3 (20/cs)	\$81.00	\$115.60	040-310U BritePro Solo LED Sterile	\$6.42	77700 Rusch DispoLED Handle	\$6.11	
	Fiber Optic Disposable			040713U BritePro Solo Mac 3	\$4.02	4150130 Rusch Polaris Mac 3	\$3.97	
	6015.C Disposable Handle Fo Medium (20/cs)	\$95.00	\$147.00	Sole-source on Health Trust \$7.65 for combo		These 3 SKUs represent \$8.00M of \$12.65M sales reported in Clarivate (63% of total sales, Jan-Nov23).		
	6023.C Disp Blade Green System Fo Mac 3 (20/cs)	\$64.00	\$87.80	These 3 SKUs represent \$10.93M of \$24.36M sales reported in Clarivate (45% of total sales, Jan-Nov23).				
	Fiber Optic Disposable (GreenLine/D)							
	5-5338-12 Disp Handle, Standard, 20/bx, sterile	\$97.00	\$135.00					
	5-5332-03 F/O Greenline D Mac Size 3 (20/bx)	\$66.60(T5)	\$75.00					
SunMed	Fiber Optic Reusable							
	5-0236-09 Greenline C/p Med Handle C (1 ea)	\$46.40	\$49.24					
	5-5272-03 Greenline F/o G-Mac Sz 3 (1 ea)	\$54.81	\$57.31					
	Conventional Disposable							
	5-5132-03 Standard/d Conv Disp Mac Sz 3 (20/bx)	\$97.00	\$99.00					
	Conventional Reusable							
	5-0237-03 Conv C/p Medium Handle C (1 ea)	\$16.04	\$17.02					
	5-5052-03 Macintosh Amer Blade Sz 3 (1 ea)	\$11.08	\$11.76					
	GreenLight ISO Green	Fiber Optic Disposable						
		4558GSP Handle, Green Std, Standard	\$121.53(T2)	\$143.75				
4603EU Blade, Steel, Green Std, Mac 3		\$82.39(T2)	\$109.28					

Laryngoscopes: Contracts

Kellie Vande Woude	AD-OR-1729	AscenDrive	Laryngoscopes - SunMed	7/31/2026	Dual	Laryngoscopes – SunMed, IntuBrite
Kellie Vande Woude	PP-OR-2206	Premier	Laryngoscopes - SunMed	7/31/2026	Multi	Laryngoscopes – SunMed, IntuBrite - New Contract PP-OR-2206 Starts 8/1/2023
Kellie Vande Woude	PP-OR-2209	Premier	Laryngoscopes - Vyaire	6/30/2026	Multi	Legacy Vyaire SKUs
Kellie Vande Woude	PP-OR-2214	Premier	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets
Derrick Tsou	MS5172	National	Laryngoscopes	3/31/2026	Multi	IntuBrite, Greenline, Parker disposable and reusable Specialty Care Impact standardization 5% for SunMed disp only
Derrick Tsou	10009862	CAPTIS	Laryngoscopes	9/30/2026	Dual	IntuBrite, Greenline, Parker disposable and reusable
Derrick Tsou	MS5172AB	Med/Surg Commit	Laryngoscopes	9/30/2026	Dual	IntuBrite, Greenline, Parker disposable and reusable

Laryngoscopes: Contracts

Kellie Vande Woude	PP-NS-2206	Acurity	Laryngoscopes - SunMed	7/31/2026	Multi	Laryngoscopes – SunMed, IntuBrite - New Contract PP-OR-2206 Starts 8/1/2023
Kellie Vande Woude	PP-NS-2214	Acurity	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets
Kellie Vande Woude	PP-OR-2206	Alliant	Laryngoscopes - SunMed	7/31/2026	Multi	Laryngoscopes – SunMed, IntuBrite
Kellie Vande Woude	PP-OR-2214	Alliant	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets
Kellie Vande Woude	CAP-OR-003	Capstone	Laryngeal Masks	7/31/2026	Multi	Air-Q3 Focused - Local Tier
Kellie Vande Woude	PP-OR-2206	Capstone	Laryngoscopes	7/31/2026	Multi	Laryngoscopes – SunMed, IntuBrite
Kellie Vande Woude	PP-OR-2014	Capstone	Laryngeal Masks	7/31/2026	Multi	Air-Q3, Parker, AES, SunMed and Stylets
Derrick Tsou	10011676	NPC	aptitude agreement Laryngoscopes	12/31/2028	Dual	IntuBrite, Greenline, Parker disposable and reusable
Blair Hobgood	RESP54	Partners Cooperative	Laryngeal Masks/Supraglottic Airways	9/14/2027	Multi	Air-Q3
Derrick Tsou	10003659	Univ of Chicago Medicine	aptitude agreement Disposable Laryngoscopes	3/31/2025	Sole	Disposable laryngoscopes

Laryngoscopes: Highest Volume SKUs

- 2015.C | DISPOSABLE HANDLE DUAL LED MEDIUM
- 1023.C | DISPOSABLE BLADE DUAL LED MAC 3
- 5-5338-12 | SUNMED DISPOSABLE LAYRNGSCOPE HANDLE, STANDARD, 20/BX, STERILE
- 1023.C2015.C | DISPOSABLE COMBO DUAL LED MAC 3, MEDIUM HANDLE
- 4603EU | BLADE, LARYN, STEEL, GREEN STD, MAC 3
- 1024.C | DISPOSABLE BLADE DUAL LED MAC 4
- 1032.C | DISPOSABLE BLADE DUAL LED MILLER 2
- 5-5332-03 | F/O GREENLINE D MAC SIZE 3
- 5-5338-11 | SUNMED DISPOSABLE LAYRNGSCOPE HANDLE, STUBBY, 20/BX, STERILE

Laryngoscopes: Questions to Ask

- What are you using today for laryngoscopes? Video laryngoscopes?
- For what % of your patients do you use video laryngoscopes?
- What is your capital budget and purchasing process? Is there a threshold?
- What are your likes/dislikes of your current laryngoscopes?
- How have you managed product recalls or quality issues?
- What issues have the batteries caused for you and your staff (difficult to change, life indicator inconsistent, treatment delays, popping)?
- Does the on/off switch become touchy or difficult (McGrath)?

Laryngoscopes: Key Selling Points

- We have one of the largest selections of reusable and disposable laryngoscope systems on the market today.
- AirLife is the only company that offers Dual-Light laryngoscope system.
- We offer a wide variety of Fiber Optic and Conventional blades and handles.
- Blades available in standard Mac & Miller styles along with over 20 different specialty style blades
- FO offering is compliant with ISO standard 7376.
- SunOne blades are constructed of Medical Grade 303/304 Surgical Stainless Steel.

Laryngoscopes / visionPRO: Key Selling Points

- VL makes everyday intubations easier and increases chances of first-pass success
- Heine VisionPRO has the only hand-held video laryngoscope handle that can go into sterilization
- Rechargeable VL removes need to purchase and change batteries (McGrath \$50-80 per & has to be thrown away if dropped more than 3 feet)
- Protective lens in blade prevents fog or splash-back onto the camera
- Video screen can be removed if more room is needed for larger patients.
- Can reprocess or wipe down handle and wipe down screen to reuse.

Laryngoscopes: Key Selling Points

- visionPRO has a 1 year warranty protection against manufacturing defects.
- Heine will provide service repairs as needed.
- Reliable on/off switch (McGrath can be touchy).
- visionPRO has larger, clearer screen than McGrath
- Screen easy to see even in bright surroundings
- visionPRO screen rotates more freely
- McGrath X-blades are 3x more expensive
- Can do direct placement if for some reason video is unavailable.

Resources:

- IntuBrite & visionPRO Lit Sheets
- Evaluation Sheets

*Prime Targets:

- **IntuBrite, SunMed on Premier (AscenDrive-Dual) & Vizient**
- **vPRO: McGrath users**
- **University hospitals**
- **Large hospitals (not pediatrics)**

Laryngoscopes: Objection Handling

Light does not work

To install, be sure the blade clicks into place, then lift the handle for the 2nd click.

visionPRO does not record.

Use the iPhone to record for cases where recording is needed.

My McGrath is less expensive

The visionPRO is an upgrade in quality and has features that the McGrath does not.

The use of video will diminish my DL skills

You can use the direct technique with the visionPRO

Disposable Blades are wasteful

Disposable blades may reduce the chances of cross-contamination

I need sterile blades

The human mouth is not sterile.

Laryngoscopes: Objection Handling

VisionPRO is too heavy:

- Have a reusable handle and blade with you to show the weight similarity between a traditional DL and the visionPRO.
- Clinicians' concerns about the visionPRO weight were diminished after they actually used it on patients.
- Demonstrate how to separate the display from the handle for cases with pregnant, obese, or barrel-chested patients. These cases will present themselves, and it's best to have them prepared.

Laryngoscopes: Objection Handling

- **We use video for difficult airways and have a system for that.**
- Heine visionPRO is for everyday intubations, not competing with large video systems like Glidescopes or C-MACs.
- **visionPRO is too big**
- visionPRO is comparable to other video laryngoscopes on the market.





Closed Suction

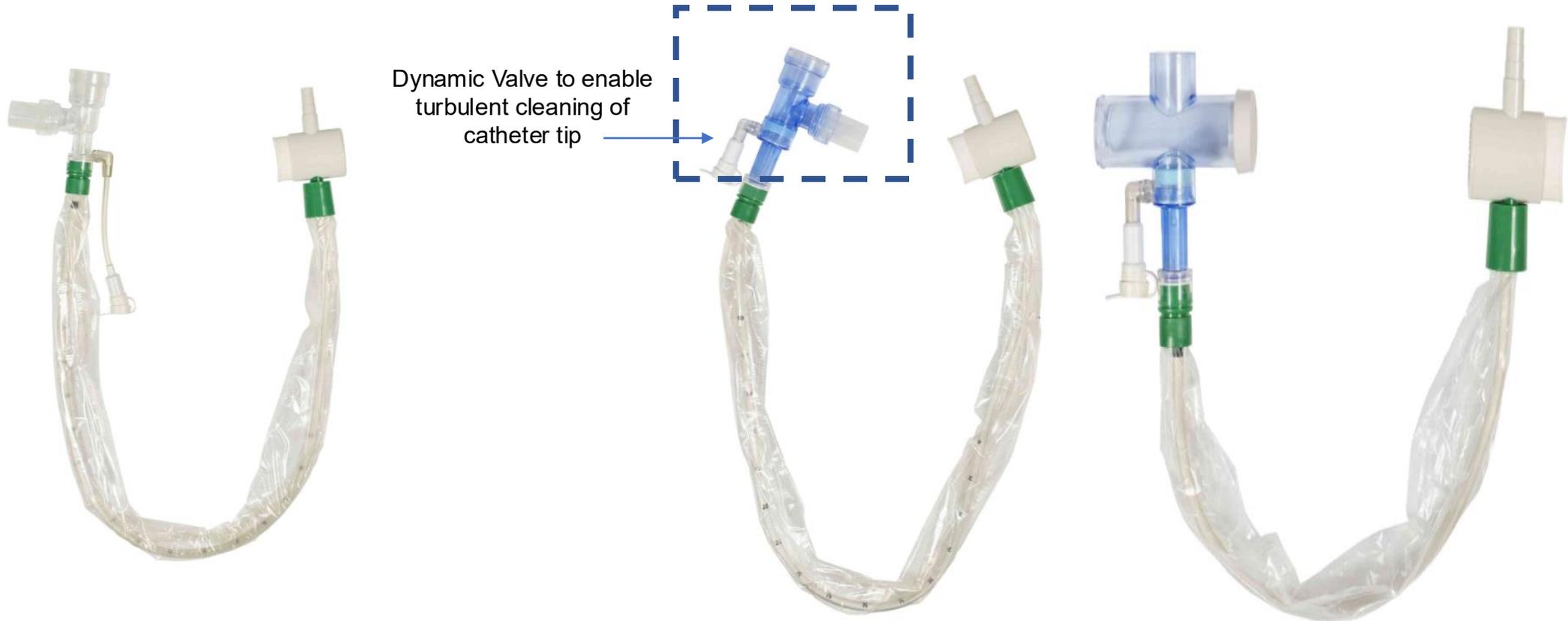
INTERNAL USE ONLY

Closed Suction Portfolio

	Ballard Adult Closed Suction Catheters				Ballard Neonate/Pediatric Catheters		Ballard Other Airway	VERSO
Product	<i>Adult Standard 24 Hr.</i>	<i>Adult TurboClean 72 Hr.</i>	<i>“Endoclear” Liberator/ Restore2</i>	<i>Adult Accessories</i>	<i>Neo/Peds Standard 24 Hr.</i>	<i>Neo/Peds Accessories</i>	<i>MiniBAL</i>	<i>Adapters & Catheters</i>
Picture								
Sizes	10-16 FR	10-16 FR	10- 16 FR	-	Y: 5-12 FR Elbow: 5-8 FR	-	13, 16 FR	5-16 FR
US Total	\$68.9M Revenue							
Intl Total	\$27.8M Revenue							

[Using a Multi Access Catheter for BLES / Surfactant administration/delivery, Alberta Health Services](#)
(11:13)

Ballard Turbo-Cleaning Catheter Design Basics



[Ballard Turbo Cleaning Closed Suction System Inservice Video](#)
(3:53)

Ballard Turbo vs. Standard Catheter

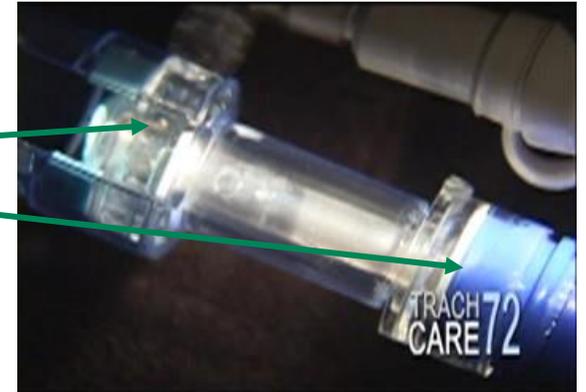
Flapper Valve- Preserves lung volumes,(PEEP) reduces risk of inadvertent lavage

Flapper Valve



Two PEEP seals- Maintains PEEP and enables cleaning the catheter tip and reducing colonization on the catheter

Two PEEP Seals



Disconnection Wedge- holds the valve in place during shipping and is used to disconnect the suction from the ETT

Disconnection Wedge



Ballard Mini-BAL (Bronchoalveolar Lavage Catheter)

FEATURES AND BENEFITS:

- Enables sampling of sputum from right/left lung (due to directional tip)
- Procedure can be performed bedside in minutes by trained respiratory therapist or other trained clinicians
- Maintains PEEP when used with supplied ventilator adapter
- Features a soft, cushioned, radiopaque tip for safe sampling from the lower lung



[Ballard Mini-BAL Inservice Video](#)
(4:30)

[Ballard Mini-BAL Inservice Poster](#)

[MiniBAL Internal Podcast - AirLife Connect](#)
(5:13)

Competition- Medline ClearPro

Key Notes:

- Medline “ClearPro” catheter is visually indistinguishable from Ballard Turbo 72hr
- Medline “ClearPro” duration of use is **“PRN, or if visibly soiled”**

Medline Messaging

- “Eliminate unnecessary changeouts for greater patient safety and quality of care”
- “For CSCs, caregivers have been limited to choosing between product labeled for specific usage periods, which may conflict with following evidence based guidelines regarding catheter change out policies” (AARC 2003 Guidelines cited)
- “Featuring a **new*** advanced cleaning chamber and **stronger sheath*** for better performance vs. competitors”
- Labeled for facilities to determine changeout policy

* no data identified to support these claims

Medline

New ClearPro™ Closed Suction Catheter System
Featuring a more advanced cleaning chamber and stronger sheath for better performance vs. competitors.

- Labeled for facilities to determine change out policy
- Isolated cleaning chamber for rapid catheter irrigation
- Pressure wiper seal to help maintain PEEP while catheter is in use
- Available in French sizes 10-16 with catheter depth markings and color-coded by ISO standards
- Kitted with all necessary adapters and connectors to simplify SKU selection
- High quality outer sleeve for a durable and tactile feel

Thumb-controlled suction locking valve
Color-coded connectors by French size
Easy to read depth markings
High-quality translucent sleeve
Colored Thumb Valves
10 Fr
12 Fr
14 Fr
16 Fr
Hinged valve for isolation of catheter tip
Soft tip helps reduce damage to mucous membranes
One-way, needleless irrigation port
Available with Double Swivel Elbow
Color coded day labels
T-piece accessories
Double Swivel elbow accessories

4 MEDLINE 1-800-MEDLINE (633-5443) | medline.com 5

Innovating to inspire.

Evidence-based care made easier.

You know your patients best, and your team works hard to ensure best practices are being followed to optimize outcomes. For closed suction, caregivers have been limited to choosing between products labeled for specific usage periods, which may conflict with following evidence-based guidelines regarding catheter change out policies.¹

Until now.

Introducing **ClearPro™** from Medline, your trusted partner in suction and tracheostomy care. ClearPro provides your facility the freedom to set—and follow—best practice protocols that can help optimize outcomes.

With an advanced cleaning chamber and enhanced sleeve, ClearPro empowers a better care experience for patients, while the Accessories Kit provides a better care experience for you.

ClearPro: the power to set—and follow—best practice.

¹ AARC Evidence-Based Clinical Practice Guidelines, Care of the Ventilator Circuit and Its Relation to Ventilator-Associated Pneumonia, Respiratory Care, 2003;48(9):869-879. Available at: https://www.aarc.org/wp-content/uploads/2014/08/09_03_08e9.pdf.

Closed Suction - ClearPro

- Competitive Overview
 - History: Quick launch of rapidly designed products, improve on quality over time. ClearPro currently on 3rd or 4th iteration, demonstrating more robust quality than prior attempts



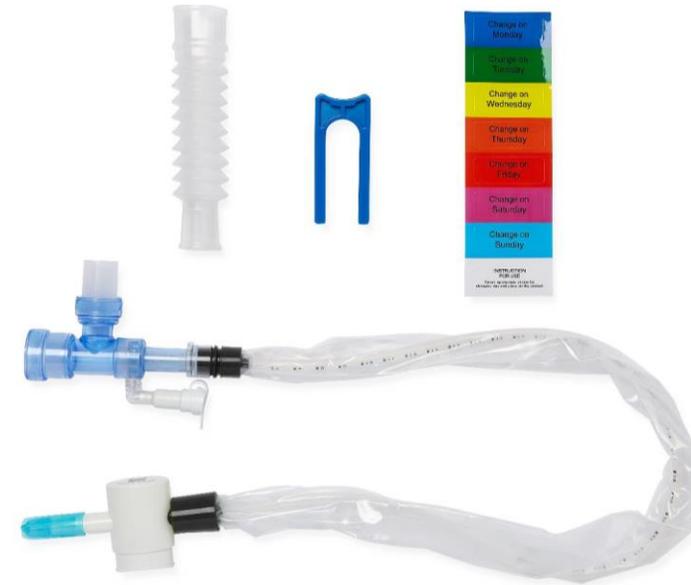
ints.
rom E
' bran
savings

ClearPro saves you up to 57% with fewer change-outs

ClearPro follows the AARC recommendations for catheter change-outs, which doesn't specify how long a closed suction catheter should be used.¹ This can reduce a facility's costs over a patient's stay by as much as 57% compared with other manufacturers' devices.²



Competition – Medline ClearPro Features

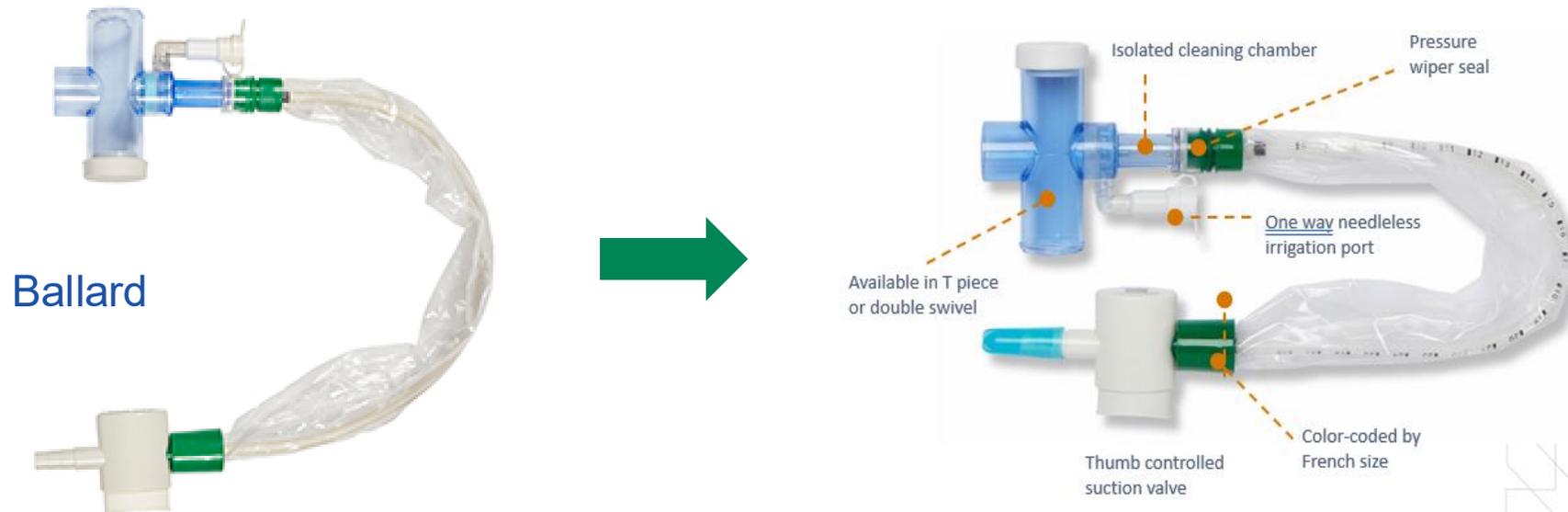


- Soft tip helps reduce damage to mucous membranes
- Translucent EVA sleeve helps reduce cross-contamination and facilitates operation when advancing the catheter

- Labeled to help facilities determine the best change-out policy
- Isolated cleaning chamber allows for rapid catheter irrigation
- Pressure wiper seal helps maintain PEEP while in use

Protecting Closed Suction

- Medline Price points: 8.60 - 9.50 for Adult
- Focusing on PV's and Partners
- No GPOs currently, but Signed Partners Cooperative IDN- GPO



Disadvantages of Competitive Product

- NICU-PICU Products Incomplete
- Standard 24 with outdated Thumb Valve
- 3 Recalls (do not disclose)
- No GPO Contracts outside of Prime Vendor Arrangements currently
- Zero Peer Reviewed Studies
- No Microbiology study
- Heavily Focused on Two Item Codes (Standard T-Piece and Double Swivel Ballard Turbo)



[Medline ClearPro Closed Suction](#)

Additional Supply Chain Tactics to Watch For

While these specific tactics are not new to Medline, starting in 2024, we saw them employed more aggressively towards Ballard for the first time

- Refreshed website pages list all Ballard Codes
- Prominently highlighting Medline Point to options
- Greater flexibility in ordering (cases AND eaches)
- Clear-Pro 72 hr “Point To” is not distinguishable from Ballard Turbo 72hr.
- Example experience: Medline over orders, unforecasted/volatile demand, contributing to backorders. Customers incorrectly informed in Feb of “backorder recovery EOM July”

The screenshot shows the Medline website interface. The breadcrumb trail is: Catalog > Respiratory > Airway Management > Suctioning > Closed Suction Catheters. The main product is 'Turbo-Cleaning Closed-Suction Catheter System' by Halyard Health, Inc. A red box highlights the 'Similar Item to Consider' section, which displays 'ClearPro Closed Suction Catheters' with a small image and a 'Login' button for pricing and availability.

The screenshot shows the Medline website interface for the 'Ballard Neonatal / Pediatric Closed Suction System with Y-Adapter' by Avanos Medical, Inc. A red box highlights the 'Similar Item to Consider' section, which displays 'Pediatric Closed-Suction Catheters' with a small image and a 'Login' button for pricing and availability. Below this, there is an 'Ordering Information' section with a table of product options.

Material	Description	Packaging
BAA195	Ballard Neonatal / Pediatric Trach Care Closed Suction System for Endotracheal Tube, Y-Adapter, 5 Fr x 30.5 cm Catheter	20/CS
BAA195H	Ballard Neonatal / Pediatric Trach Care Closed Suction System for Endotracheal Tube, Y-Adapter, 5 Fr x 30.5 cm Catheter	1EA
BAA196	Ballard Neonatal / Pediatric Trach Care Closed Suction System for Endotracheal Tube, Y-Adapter, 6 Fr x 2.0 mm Catheter	20/CS

Ballard Longevity

30+ Years of Closed Suction Innovation

Pediatric/
Adult Elbow



Adult Double-
Swivel Elbow



Liberator/
Restore2
ETT Clearing
Systems



Neonatal
Manifold



Pediatric "Y"



Verso Closed
Suction System



Directional
Tip



Neonatal Multi-
Access Catheter



Qwik Clip



Adult T-piece



Turbo-Cleaning
Catheter



Capped
Catheters



**NEW!
Coming
Soon**

A Full Range of Closed Suction Systems

For Adult and Pediatric Patients

Options	ET Length	Trach	Length	T-piece	Double-Swivel Elbow	Elbow	Wet Pak	MDI Adapter	Directional Tip
Adult TurboClean 72-hour	10-16 Fr	10-14 Fr	10-16 Fr	10-16 Fr	-	14 Fr	12-14 Fr	-	-
Adult Standard 24-hour	10-16 Fr	12-14 Fr	10-16 Fr	12-16 Fr	12-16 Fr	14-16 Fr	14-16 Fr	12-14 Fr	12-14 Fr

Options	ET Length	Trach	Elbow	Elbow	Manifold	“Y”	Color-coded Graduations	Multi-Access	Wet Pak
Pediatric	5-12 Fr	8-10 Fr	5-10 Fr	5-8 Fr	5-12 Fr	5-12 Fr	5 Fr	6-10 Fr	8-10 Fr

Specialty Catheters:

- Ballard Multi-Access Catheter for Neonates/Pediatrics
- Ballard Qwik Clip Catheter
- Ballard Tracheostomy Closed Suction System with caps
- Ballard Liberator ET Tube Clearing System
- Ballard Restore2 Endotracheal Tube Cleaner
- Ballard Mini-BAL Sampling Catheter

Ballard Closed Suction Systems

- Adult | 24 hour
- Available in sizes 10-16 Fr
- Color-coded by FR size
- "Soft" low durometer catheter to minimize tracheal trauma
- Tactile sleeve for catheter advancement
- Depth markings for measured depth suctioning to help prevent unnecessary tracheal trauma
- Thumb-controlled suction valve
- Locks to prevent accidental suctioning

BALLARD* CLOSED SUCTION SYSTEMS

GOLD STANDARD IN CLOSED SUCTION FOR MORE THAN **30 YEARS**

THE BALLARD* FAMILY OF CLOSED SUCTION PRODUCTS INCLUDES:

- Neonatal / Pediatric Closed Suction Systems (5-10 Fr)
- Standard Closed Suction Systems
- Turbo-Cleaning Closed Suction Systems
- T-piece, double-swivel elbow, elbow and Y configurations
- Integrated MDI port, directional tip and dual-lumen options available

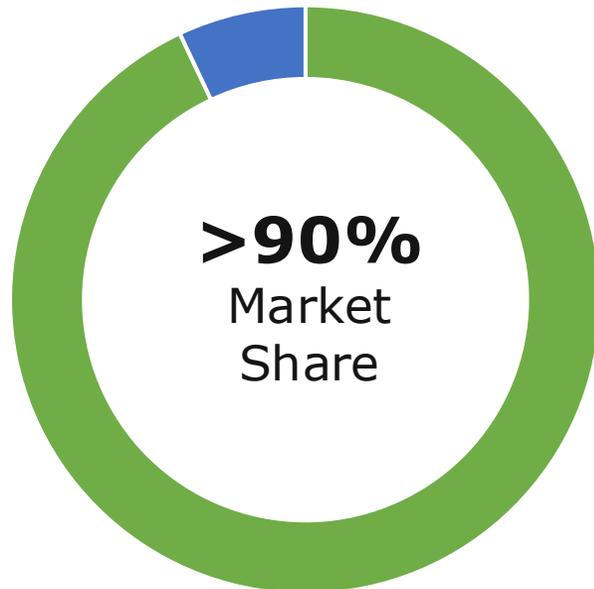
Avanos also offers a range of **BALLARD* Heat and Moisture Exchangers (HMEs)**

1 Ng KL, Kumarasinghe G, Ingh T. Disruption of respiratory secretions during tracheal tube suctioning in an intensive care unit. Ann Acad Med Singapore 1999; 28: 179-182.

2 Evans J, Syddall S, Bull W, Kinney S. Comparison of open and closed suction on safety, efficacy and nursing time in a paediatric intensive care unit. Aust Crit Care 2016; 27: 70-76.

Ballard Market Leader

- Market Leader in Closed Suction for over 30 Years
- Ballard Closed Suction Systems are the #1 choice of providers and clinicians



BALLARD® CLOSED SUCTION SYSTEMS

PROVEN TO DECREASE BACTERIAL COLONIZATION BY **89%***

CATHETER RETRACTS WITHIN A UNIQUE, ISOLATED TURBULENT CLEANING CHAMBER RESULTING IN AN 89%+ CLEANER CATHETER TIP

THE BALLARD® FAMILY OF CLOSED SUCTION PRODUCTS INCLUDES:

- Neonatal / Pediatric Closed Suction Systems
- Standard Closed Suction Systems
- Turbo-Cleaning Closed Suction Systems
- Multi-Access Port Closed Suction Systems
- T-piece, double-swivel elbow, elbow and Y configurations
- Integrated MDI port, directional tip and dual-lumen options available

ONE-WAY LAVAGE PORT designed to prevent "sprayback"

HINGED VALVE isolates catheter tip and helps prevent inadvertent lavage

TURBULENT CLEANING CHAMBER creates cleansing action, resulting in a cleaner catheter

PEEP SEAL helps reduce PEEP loss and inadvertent lavage

INTEGRATED MDI PORT (optional)

1 Ng KL, Kumarasingh S, Ng J. Dissemination of respiratory viruses during tracheal tube suctioning in an intensive care unit. *Ann Acad Med Singapore* 1999; 28: 139-42.

2 Kramer, A., Schwab, J. & Kumpf, G. How long do respiratory pathogens persist on inanimate surfaces? A systematic review. *BMC Infect Dis* 6: 100 (2006). <https://doi.org/10.1186/1471-2288-6-100>

3 Eales J, Syddall S, Butt W, Kinney S. Comparison of open and closed suction on safety, efficacy and nursing time in a paediatric intensive care unit. *Bull Int Care* 2014; 17: 70-74.

4 Compared to Ballard® TrachCare® 24-hour closed suction systems. Ballard® Critical Care Products Trach Care® 72. *Workshop Report, Tucson (September 2014)*

For more information, or to contact your local sales representative, please visit www.ballardmedicaldevices.com

Next Steps Going into an Account

- Protect & Grow Action Plan
- Review Medline / Customer PV file and identify all Adult TurboClean 72hr and Adult Standard 24hr users
 - Vizient – Sole Source. Start with high-volume accounts 1st and work your way through your account list
 - Premier – Sole Source
 - Low Risk – HealthTrust and Children’s Hospitals
- TSM/ASD/IDN Team Meet with key Supply Chain and Respiratory stakeholders to uncover competitive threat
 - Ask if ML has approached clinical team regarding ML adult suction
 - Do they plan on evaluating it or do they plan on taking a closer look at it?
 - Collect as much information as you can (obtain pricing quote, if possible)
 - Remind them of our sole source contract position – Vizient, Premier and HealthTrust
- Communicate with the Team regarding any at risk accounts
 - Send email to Namrata Sopory, Chris Holt, Clinical Team, Manager, GPO (Derrick, Kellie or Neal), Ezra Pearson, IDN team and Mark

Competition – ICU Medical

(formerly Smith's Medical / Portex™)

Portex^R - SuctionPro 72™

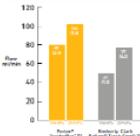


- 72 hour recommended duration of use.
- Clear pathway evacuation port.
- Lockable thumb valve end cap.
- Clear T piece to visualize pathway.
- Flexible catheter sleeve.
- Trac-Wedge™ device to aid in disconnection of the catheter from the patients tracheal or tracheostomy tube.
- Swivel connector available to aid in reduced torque.

Features Overview

Product Features	Smith's Portex SuctionPro
Duration usage	72 hrs.
Price (approximate)	\$5
ET sizes	10 - 16 Fr
Trach sizes	10 - 16 Fr
Pediatric sizes	NO
Depth markers?	YES
ET w/ MDI	10 - 16 Fr
Trach w/ MDI	10 - 16 Fr
Wetpack?	NO
Directional tip option?	YES
Radiopaque tip?	NO
Bronchoscopy?	NO
Tethered cap?	NO
Atraumatic tip?	YES
Isolated tip when cleaning?	NO
Dual lumen option?	12 - 16 Fr
Flex tube?	YES
Removal Wedge?	NO
Detachable catheter?	NO
24 hour option?	YES
DEHP free?	NO
Viewing window for secretions	YES
PEEP seal?	YES

Competition – ICU Medical

DISTINCTION	PRICE (APPROXIMATE)	SIZE RANGE						
Linear-path thumb valve, wiper seal, low cost	\$7	10 – 16 Fr (Trach & ET Length) Pediatric: None						
THEIR POSITIONING								
Clinically acceptable 72 hour catheter for a lower cost.								
FEATURE	FUNCTION / BENEFIT							
Linear-path thumb valve	Smooth passage of the suction material and ease of cleaning (compared to a push-button thumb valve), reduces the likelihood of trapped material and microbial growth							
Clear thumb valve	Provides visual confirmation that the suction piston has reverted back to its closed position and the catheter is sealed from inadvertent suction							
Elevated safety wings	Provide a guide for the thumb valve actuator and prevent the patient from inadvertently self-suctioning							
Wiper seal	Clears secretions from the outer side of the catheter and ensures no airway pressure is lost due to leakage into the catheter sleeve							
THEIR CLAIM	SUPPORT	OUR-REPOSITIONING						
“Greater suction efficiency” SuctionPro 72 had a greater flowrate, compared to Ballard Standard	Artificial Mucus, 1% sodium alginate solution, density equivalent to patient secretions.	Probing questions: - What is the benefit of having a higher flow rate? - Is there any issue with current flow rate?						
 <table border="1"> <caption>Flow Rate Comparison</caption> <thead> <tr> <th>Product</th> <th>Flow Rate (ml/min)</th> </tr> </thead> <tbody> <tr> <td>SuctionPro 72</td> <td>100</td> </tr> <tr> <td>Ballard Standard</td> <td>60</td> </tr> </tbody> </table>			Product	Flow Rate (ml/min)	SuctionPro 72	100	Ballard Standard	60
Product	Flow Rate (ml/min)							
SuctionPro 72	100							
Ballard Standard	60							
QUICK TIPS, ADDITIONAL NOTES & HOW TO WIN								
<ul style="list-style-type: none"> - The catheter tip is cut at an angle, which may not be atraumatic. - If you don't pull the blue thumb valve back far enough, the suction may be occluded. (MAUDE report) - Reports of inefficient suctioning minutes to hours of use. (MAUDE report) - Reports of the spring in the thumb valve getting stuck. . (MAUDE report) - If a catheter malfunctions, the circuit must be broken to replace it. - Reports of catheter tip remaining visibly soiled after rinsing with saline. 								

Competition – Flexicare CLiC™ Closed Suction Systems

- **Video Link:** <https://youtu.be/LkT0oW220sl>
- **Claims:**
 - CLiC Closed Suction Catheters are a range of disposable devices intended for routine suctioning of secretions for ventilator-dependent patients with an artificial airway, typically an endotracheal tube or a tracheostomy.
 - Differs from all other closed suction catheters on the market because **they filter contaminated exhaust from the catheter sleeve every time it is advanced into the patient's airway to suction secretions**
 - CLiC is **designed to include bacterial/viral filter technology** to filter any contaminated air from the catheter sleeve prior to being released into the patient room.
 - The CLiC has an integrated hydrophobic, antibacterial filter that has up to a 99.99% Viral Filtration Efficiency (VFE) and a Bacterial Filtration Efficiency (BFE) of 99.93%.
 - The value prop of CLiC is that they are the only closed suction catheters that filter the contaminated air from the catheter sleeve, thereby reducing contaminants vented into the patient room
 - Duration of Use: PRN changeout up to 7 Days caters to clinicians who prefer to change catheters only as needed



Competition – Flexicare CLiC™ Closed Suction Systems

- **Counter Positioning:**

- **Ballard has been the market leader** in closed suction for more than 30 years
- **Ballard CSCs are manufactured in accordance with ISO 8836:2019 and are designed to safely suction patients on mechanical ventilation**, by removing secretions from the airway while maintaining ventilation and oxygenation throughout the suctioning procedure
- CLiC product claims to “filter contaminated exhaust from the catheter sleeve every time it is advanced into the patient’s airway to suction secretions”.
- * No clinical literature found with data on the amount of entrapped air within a sleeve, nor the potential level of contamination of the entrapped air that would definitively lead to cross contamination
- * A causal relationship between entrapped sleeve air and cross contamination is not clear.
- * No clinical studies located involving the CLiC product that demonstrated a statistically significant impact to cross-contamination outcomes.
- CSCs are traditionally a Class 1 exempt device with the FDA. This product type does not typically have a filter and filters associated with respiratory devices are typically considered a Class 2 device per the FDA. Filters are also typically marked for 24hr use, and it would be helpful to understand what testing has been done to support 7 days use of the filter on the CLiC device.
- Ballard product line offers a portfolio that includes both Pediatric Elbows and select tracheostomy length catheters, which are not included in the CLiC product line.



Competition – Flexicare Cross to Ballard Products

Code	Size	Description	Adapter	Length	Features	QTY	Ballard Code	Cross Type	Cross Notes	Duration of Use	Size	Adapter	Length	Length	Features	Accessories	Qty
050-63-110	10	Adult ET Closed Suction Catheter Size 10Fr 540mm (21.3in)	T-Piece	ET Length		20	227105	Direct		72 hr.	10	T-Piece	21.3in/54cm	ET Length		22mm Flex Adapter	20
050-63-112	12	Adult ET Closed Suction Catheter Size 12Fr 540mm (21.3in)	T-Piece	ET Length		20	22715	Direct		72 hr.	12	T-Piece	21.3in/54cm	ET Length		22mm Flex Adapter	20
050-63-114	14	Adult ET Closed Suction Catheter Size 14Fr 540mm (21.3in)	T-Piece	ET Length		20	22705	Direct		72 hr.	14	T-Piece	21.3in/54cm	ET Length		22mm Flex Adapter	20
050-63-116	16	Adult ET Closed Suction Catheter Size 16Fr 540mm (21.3in)	T-Piece	ET Length		20	227165	Direct		72 hr.	16	T-Piece	21.3in/54cm	ET Length		22mm Flex Adapter	20
050-63-210	10	Adult Tracheostomy Closed Suction Catheter Size 10Fr 305mm (12in)	T-Piece	Trach Length		20	2271013	Functional	Double Swivel Elbow (not T-Piece)	72 hr.	10	Double Swivel Elbow	12in/30.5cm	Trach Length			20
050-63-212	12	Adult Tracheostomy Closed Suction Catheter Size 12Fr 305mm (12in)	T-Piece	Trach Length		20	227135	Direct		72 hr.	12	T-Piece	12in/30.5cm	Trach Length		15mm Straight Swivel Adapter, 22mm Flex Adapter	20
050-63-214	14	Adult Tracheostomy Closed Suction Catheter Size 14Fr 305mm (12in)	T-Piece	Trach Length		20	2270135	Direct		72 hr.	14	T-Piece	12in/30.5cm	Trach Length		15mm Straight Swivel Adapter, 22mm Flex Adapter	20
050-63-216	16	Adult Tracheostomy Closed Suction Catheter Size 16Fr 305mm (12in)	T-Piece	Trach Length		20	2270135	Functional	14 Fr instead of 16 Fr	72 hr.	14	T-Piece	12in/30.5cm	Trach Length		15mm Straight Swivel Adapter, 22mm Flex Adapter	20
050-64-110	10	Adult ET Closed Suction Catheter Size 10Fr 540mm (21.3in)	Double Swivel Elbow	ET Length		20	227105	Functional	T-Piece			T-Piece					20
050-64-112	12	Adult ET Closed Suction Catheter Size 12Fr 540mm (21.3in)	Double Swivel Elbow	ET Length		20	22716	Direct		72 hr.	12	Double Swivel Elbow	21.3in/54cm	ET Length		15mm x 22mm Flex Adapter	20
050-64-114	14	Adult ET Closed Suction Catheter Size 14Fr 540mm (21.3in)	Double Swivel Elbow	ET Length		20	227	Direct		72 hr.	14	Double Swivel Elbow	21.3in/54cm	ET Length		15mm x 22mm Flex Adapter	20
050-64-116	16	Adult ET Closed Suction Catheter Size 16Fr 540mm (21.3in)	Double Swivel Elbow	ET Length		20	227161	Direct		72 hr.	16	Double Swivel Elbow	21.3in/54cm	ET Length		15mm x 22mm Flex Adapter	20
050-64-210	10	Adult Tracheostomy Closed Suction Catheter Size 10Fr 305mm (12in)	Double Swivel Elbow	Trach Length		20	2271013	Direct		72 hr.	10	Double Swivel Elbow	12in/30.5cm	Trach Length		15mm x 22mm Flex Adapter	20
050-64-212	12	Adult Tracheostomy Closed Suction Catheter Size 12Fr 305mm (12in)	Double Swivel Elbow	Trach Length		20	2271603	Direct		72 hr.	12	Double Swivel Elbow	12in/30.5cm	Trach Length		15mm x 22mm Flex Adapter	20
050-64-214	14	Adult Tracheostomy Closed Suction Catheter Size 14Fr 305mm (12in)	Double Swivel Elbow	Trach Length		20	22703	Direct		72 hr.	14	Double Swivel Elbow	12in/30.5cm	Trach Length		15mm x 22mm Flex Adapter	20
050-64-216	16	Adult Tracheostomy Closed Suction Catheter Size 16Fr 305mm (12in)	Double Swivel Elbow	Trach Length		20	22703	Functional	14 Fr instead of 16Fr	72	14	Double Swivel Elbow	Trach Length				20
050-65-410	10	Adult ET Closed Suction Catheter Size 10Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	MDI	20	227105	Functional	T-Piece, Does not include MDI port								20
050-65-412	12	Adult ET Closed Suction Catheter Size 12Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	MDI	20	22716	Functional	Does not include MDI port	72 hr.	14	Double Swivel Elbow	21.3in/54cm	ET Length	MDI	15mm x 22mm Flex Adapter	20
050-65-414	14	Adult ET Closed Suction Catheter Size 14Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	MDI	20	2271418	Direct									20
050-65-416	16	Adult ET Closed Suction Catheter Size 16Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	MDI	20	227161	Functional	Does not include MDI port								20
050-65-310	10	Adult ET Closed Suction Catheter Size 10Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	EtCO2 Port	20	227105	Functional	T-Piece, Does not include EtCO2 Port								20
050-65-312	12	Adult ET Closed Suction Catheter Size 12Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	EtCO2 Port	20	22716	Functional	Does not include EtCO2 port								20
050-65-314	14	Adult ET Closed Suction Catheter Size 14Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	EtCO2 Port	20	227	Functional	Does not include EtCO2 port								20
050-65-316	16	Adult ET Closed Suction Catheter Size 16Fr 540mm (21.3in)	Double Swivel Elbow	ET Length	EtCO2 Port	20	227161	Functional	Does not include EtCO2 port								20
050-62-105	5	Neonatal Closed Suction Catheter Size 5Fr 305mm (12") with Y-Sets 2.0/2.5mm				20	195	Direct									20
050-62-106	6	Infant Closed Suction Catheter Size 6Fr 305mm (12") with Y-Sets 2.5/3.0/3.5mm				20	196	Direct									20
050-62-107	7	Infant Closed Suction Catheter Size 7Fr 305mm (12") with Y-Sets 3.0/3.5/4.0mm				20	197	Direct									20
050-62-108	8	Infant Closed Suction Catheter Size 8Fr 305mm (12") with Y-Sets 3.5/4.0/4.5mm				20	198	Direct									20
050-62-110	10	Paediatric Closed Suction Catheter Size 10Fr 405mm (16") with Y-Sets 4.5/5.0/5.5mm				20	1910	Direct									20

Competition – Medtronic DAR™

Overview:

- Long established Closed Suction system in international markets (Europe, Japan)
- “Re-Launched” in US in early 2024 with refreshed marketing material on website, published code list
- Positioning is primarily versus open suctioning
- Some sightings at local product fairs, limited trials, no success seen so far
- Differentiated by modular design for Adult and Neonate/Ped products (similar to Airlife Verso)
- No competitive pricing identified thus far

Medtronic

DAR™ closed suction system

Designed with patient comfort, clinician safety, and efficient workflow in mind.

The DAR™ closed suction system is designed to expel tracheal secretions and preserve airway clearance for patients with an artificial airway in place. Beyond reducing the physiological impact of endotracheal suctioning to the patient, closed suction systems offer protection for the clinician, compared to open suctioning.¹

Benefits of closed endotracheal suctioning¹:

- Improved physiological impact:
 - Improved oxygenation and PEEP maintenance²
 - Reduced impact on intracranial pressures³
- Effective secretion management⁴
- Easy to use, requires shorter suctioning time, and uses only one nurse^{4,5}
- Supports clinician safety by minimizing exposure⁶



DAR™ neonatal-pediatric closed suction system

DAR™ closed suction system

Order information

DAR™ closed suction system, replaceable catheter
Endotracheal length: 580 mm
Time of use: 72 hours

	CFN	Size Fr/Ch	Color
Standard	444SP02010	10	Black
	444SP02012	12	White
	444SP02014	14	Green
	444SP02016	16	Orange
With MDI port	444SP02110	10	Black
	444SP02112	12	White
	444SP02114	14	Green
	444SP02116	16	Orange
Coudé with MDI port	444SP02412	12	White
	444SP02414	14	Green
With T-piece for CPAP	444SP03012	12	White
	444SP03014	14	Green

Packaging: 10 each/box, sterile

Replacement catheters

Endotracheal length: 580 mm

	CFN	Size Fr/Ch	Color
For standard version	444SP00010	10	Black
	444SP00012	12	White
	444SP00014	14	Green
For coudé version	444SP00016	16	Orange
	444SP00414	14	Green

Packaging: 10 each/box, sterile

DAR™ closed suction system, replaceable catheter

Tracheostomy length: 365 mm

Time of use: 72 hours

	CFN	Size Fr/Ch	Color
Standard	444SP02312	12	White
	444SP02314	14	Green
	444SPY2312	12	White
For Shiley™ cannulas	444SPY2314	14	Green
	444SPY2316	16	Orange
	444SPY2512	12	White
With MDI port	444SP02514	14	Green
	444SP02516	16	Orange
With T-piece for CPAP	444SP03312	12	White
	444SP03314	14	Green

Packaging: 10 each/box, sterile

Replacement catheters

Tracheostomy length: 365 mm

	CFN	Size Fr/Ch	Color
Standard	444SP00512	12	White
	444SP00514	14	Green
	444SP00516	16	Orange

Packaging: 10 each/box, sterile

Accessories

CFN	Description	Quantity
111/1156	Cap set: bronchoscopy self sealing cap + suction catheter protecting cap	25 each/box

DAR™ neonatal-pediatric closed suction system

Time of use: 48 hours

	CFN	Size Fr/Ch + Ø ETT adapter	Length	Color
Y-piece connector	444S02605	5+2.0/2.5 mm	310 mm	Black
	444S02606	6+2.5/3.0/3.5 mm	320 mm	White
	444S02607	7+3.0/3.5/4.0 mm	320 mm	Green
	444S02608	8+3.5/4.0/4.5 mm	360 mm	Orange
Elbow connector	444S02610	10+4.5/5.0/5.5 mm	460 mm	Black
	444S02706	6	320 mm	White
Manifold connector	444S02708	8	360 mm	Green
	444S02710	10	460 mm	Orange
Manifold connector	444S02805	5	310 mm	Black
	444S02806	6	320 mm	White
	444S02808	8	360 mm	Green

Packaging: 10 each/box, sterile



All products are latex free and DEHP free.

For trained personnel only. For specific indications and instructions for use, please refer to the product manual.

- Ramirez-Torres, C.A. et al. (2023) Closed Endotracheal Suction Systems for COVID-19: Rapid Review. *Interactive Journal of Medical Research*, 12.
- Dexter AM, Scott JB. Airway Management and Ventilator-Associated Events. *Respir Care*. 2019 Aug;64(8):986-993. doi: 10.4187/respcare.07107. PMID: 31346073.
- Blakeman TC, Scott JB, Yoder MA, Capellari E, Strickland SL. AARC Clinical Practice Guidelines: Artificial Airway Suctioning. *Respiratory Care*. 2022;67(2):258-271. doi: 10.4187/respcare.09548.
- Elmansoury A, Said H. Closed suction system versus open suction. *Egyptian Journal of Chest Diseases and Tuberculosis*. 2017;66(3):309-313. doi:https://doi.org/10.1016/j.ejcdt.2016.08.001
- Sola I, Benito S. Closed tracheal suction systems versus open tracheal suction systems for mechanically-ventilated adult patients. *Cochrane Database of Systematic Reviews*. Published online October 17, 2007. doi:https://doi.org/10.1002/14651858.cd004581.pub2
- Ricard, J. D., Evellard, M., Martin, Y., Barnaud, G., Branger, C., Dreyfuss, D. 2011. Influence of tracheal suctioning systems on health care workers' gloves and equipment contamination: A comparison of closed and open systems. *Am J Infect Control*. 2011 Sep;39(7):605-7. doi: 10.1016/j.ajic.2010.10.031. Epub 2011 Apr 21. PMID: 21514008.

©2024 Medtronic. Medtronic, Medtronic logo, and Engineering the extraordinary are trademarks of Medtronic. All other brands are trademarks of a Medtronic company. 01/2024 - US-RE-2300520 - [WF#11372626]

medtronic.com/covidien

Medtronic

Competition – Medtronic DARTM

Strengths:

- Modular design for Adult catheter (adapter/manifold stays attached to patient ET/Trach adapter, replacement catheters available for purchase in all sizes). Adapter has a dial to close off the circuit during catheter changeout
- Various sizes with MDI ports (ET and Trach length)
- Neonate/Ped catheters marked for 48 hr use
- Cap set/Bronch adapter included in portfolio
- Some specialty catheters included (e.g. for suctioning of Shiley Cannulas)

Weaknesses/Counter Points:

- Adult: Despite the ability to rotate adapter dial to close off the circuit during catheter changeout, no evidence/claims about clinical benefits or improved outcomes. No indication that PEEP is maintained during catheter changeout
- Neonate/Peds: Modular design is such that the dial is attached to the replacement catheter, and used to isolate the catheter tip after retraction, primarily to prevent it being left in the airway

Questions to Ask / AirLife Offering:

- Ask why the customer is interested in the Medtronic DAR modular design?
 - Response: Longer duration of use? Counter : Consider AirLife Verso Closed Suction
 - Response: Maintain PEEP duration catheter changeout? Counter: No claims to this effect. Additionally, Neo/Ped catheter design does not support this aim
 - Response: More MDI port options than Ballard? Counter: Catheters with MDI ports less in use due to unclear efficacy of medication delivery through this mechanism as seen in sales trends

Closed Suction: Contracts

Neal Harpstrite	107806	National	Closed Suction	4/30/2026	Sole	Closed Suction product line
Kellie Vande Woude	AD-NS-1223	AscenDrive	Closed Ventilation Suction	2/28/2025	Dual	Ballard
Kellie Vande Woude	PP-NS-1570	Premier	Closed Ventilation Suction	2/28/2025	Multi	Ballard Closed Suction
Kellie Vande Woude	SP-NS-1570	Surpass	Closed Ventilation Suction	2/28/2025	Sole	Ballard
Derrick Tsou	MS5410	National	Closed Suction Catheters	9/30/2025	Sole	Ballard, Closed Suction Systems
Derrick Tsou	10008287	CAPTIS	Closed Suction Catheters	1/31/2026	Sole	Ballard, Closed Suction Systems
Derrick Tsou	MS5410AD	Med/Surg Commit	Closed Suction Catheters	1/31/2026	Sole	Ballard, Closed Suction Systems
Derrick Tsou	AVANO-0087242	National	Closed Suction	12/31/2027	Sole	Ballard, Closed Suction Systems
Kellie Vande Woude	PP-OR-1570	Acurity	Ballard Closed Suction	2/28/2025	Sole	Ballard Closed Suction



INTERNAL USE ONLY

Closed Suction: Contracts

Kevin Veenstra	AHP-NS-0264	Advantus	Closed Ventilation Suction	10/31/2027	Multi	Ballard
Kellie Vande Woude	PP-OR-1570	Alliant	Closed Ventilation Suction	2/28/2025	Sole	Ballard Closed Suction
Kellie Vande Woude	PP-NS-1570	Capstone	Closed Suction Catheters	2/28/2025	Sole	Ballard Closed Suction
Derrick Tsou	MS5410AB	Children's Hospital Association	Closed Suction Catheters	9/30/2025	Sole	Ballard, Closed Suction Systems
Derrick Tsou	10006603	Houston Methodist	aptitude agreement Closed Suction Catheters	5/31/2025	Sole	Ballard Closed Suction
Derrick Tsou	10012553	NPC	aptitude agreement Closed Suction Catheters	1/31/2028	Sole	Ballard, Closed Suction Systems
Blair Hobgood	RESP11	Partners Cooperative	Closed Suction	3/31/2025	Sole	Ballard Closed Suction - 32014122
Kellie Vande Woude	PP-NS-1570	Yankee Alliance	Closed Vent Suction	2/28/2025	Sole	Ballard Closed Suction

Closed Suction: Highest Volume SKUs

- 227 | BALLARD TRB ADLT DSE NDEHP,14FR,20
- 2210 | BALLARD ADLT DSE NDEHP,14FR,20
- 2205 | BALLARD ADLT TPC NDEHP,14FR,20
- 22705 | BALLARD TRB ADLT TPC,14FR,20
- 2270135 | BALLARD TRB ADLT TPC,14FR,20
- 220135 | BALLARD ADLT TPC,14FR,20
- 198 | BALLARD NN PED Y ADTR NDEHP,8FR,20
- 196 | BALLARD NN PED Y ADTR NDEHP,6FR,20
- 22103 | BALLARD ADLT DSE NDEHP,14FR,20
- 208 | BALLARD NN PED ELBOW NDEHP,8FR,20
- 22703 | BALLARD TRB ADLT DSE,14FR,20
- 1900 | BALLARD MULTI-ACC CTH NDEHP,5FR,5
- 197 | BALLARD NN PED Y ADTR NDEHP,7FR,20
- 210 | BALLARD NN PED ELBOW NDEHP,10FR,20

Closed Suction: Questions to Ask

- What is the hospital change-out policy?
- What catheters do you use currently (go see them)?
- Do you do open suctioning? Where?
- What have you found to be the pros and cons of the current product?
- What quality improvement projects are you working on currently? (infection

Closed Suction: Key Selling Points

- Turbo stays cleaner 3x longer than standard. Only product with microbiology study to backup cleanliness claims
- More consistent lung volumes
- 3-day change-out more appropriate for current use
- Ballard portfolio is comprehensive: Includes Wet Paks, MDI options, Directional Tips, Capped Catheters
- GPO Position: Sole Source HealthTrust, Vizient, Premier
- Anecdotal: Medline copies have shown poor quality

***Prime Targets:**

- Unhappy with current catheters
- Closed Suction Catheters, Restore2, Liberator, Mini-BAL all sole source with Premier (Ascend & Surpass), HealthTrust, Vizient
- Customers driven to reduce infections

Resources:

- Nelson Labs Study
- Ballard Turbo Brochure
- In-Service Poster

Closed Suction: Objection Handling

We only change as needed, usually after several days

The Ballard Turbo is more appropriate for the longer use approach. Older catheters are only indicated for 24-hour use.

Our catheter is less expensive than what you are offering

Turbo Clean system offers a cleaner catheter with more consistent lung volumes due to the double peep seal and dynamic flapper valve.

Ballard products have a history of quality and reliability. Turbo cleaning catheters have been used in clinical studies, and are the only catheter whose duration of use claims are backed by a microbiology study



Ballard Oral Care

INTERNAL USE ONLY

Ballard 24 Hour Oral Care Kit Configurations

Oral Care Kit Q4 97021 with CHG 97014

- 1-Prep Pack
- 2-Toothbrush Pack
- 4-Suction Swab Packs (H2O2 solutions)
- 2- Suction Catheters



Oral Care Kit Q2 97020 with CHG 97012

- 1-Prep Pack
- 2- Toothbrush Packs
- 4-Suction Swab Packs(H2O2 solution)
- 6-Suction Swab Packs(Alcohol-Free Mouthwash)
- 2-Suction Catheters



Mini Oral Care Kit Q4 970008

- 1- Prep Pack
- 2-Toothbrush Packs with Alcohol-Free Mouthwash (0.04% CPC)
- 4-Mini Suction Swab with Alcohol-Free Mouthwash (0.04% CPC)
- 2 Mini Suction Catheter Packs (8 Fr)



Assisted Care Kit 24 Hour 970600, with CHG 970160

- 1-Prep Pack
- 2-Toothbrush Packs
- 1-Suction Swab Pack (H2O2 solution)
- 1-Suction Swab Pack (Alcohol Free Mouthwash)



INTERNAL USE ONLY

Ballard Oral Care

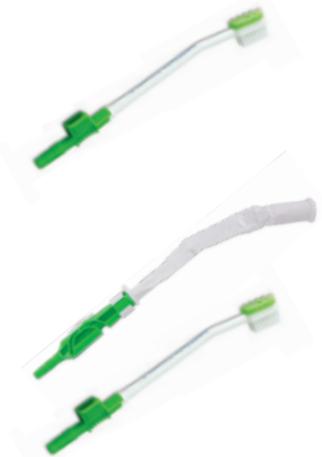
Comparative Market Share Estimates: SAGE: ~65%, Ballard: ~20%, MEDLINE: ~15%



Sage/Stryker:

- First to Market
- Full line of products
 - q2, q4, q8 kits (with and without CHG)
 - q2 and q4 kit with thumb port suction
 - Corinz for Ease of Use (combined CPC + Moisturizer) instead of H2O2, or along with H2O2 in a kit
 - Petite Kit labeled “For Pediatrics”
 - Self Care Kits, Kits of Edentulate Patients
 - Home Care Kits/products
 - Standard Toothbrushes
 - “Burst pouches” and thumb controlled suction tools that connect directly to suction are a selling point for loyal Sage users

Ballard Oral Care Product Comparisons



Feature	Standard	Ballard Oral Care
Packaging	Bag, Monochromatic Packaging	Box – Can be set on table Color Coded Order of Use Guide, and Component Packs to clearly identify next procedure to perform Enables visual monitoring of oral care delivery
Component Packaging	Soft Burst pouches	Rigid Trays intended to be placed flat. Do not have to be held while performing oral care. Enables easy access to components. Ensures solutions do not spill if clinician has to step away.
Antiplaque Solution	Combined CPC + Mouth Moisturizer solution for “ease of use”	Separate CPC and mouth moisturizer. Enables moisturizer application after suctioning, so as to stay on oral mucosa, and not be suctioned out along with CPC solution
Suction Handle	Each suction tool connects to suction “Open suction” (thumb controlled) suction handle	Suction handle stays connected to suction, suction tools connects firmly to handle with “Press and Twist” “Closed” system – On/off switch for suction ensures gloves are not exposed to secretions while suctioning (cross contamination risk)
Yankauer Cap Design	Yankauer cap does not have a seal. Secretions remain on yankauer shaft after use.	A seal in the yankauer cap pushes secretions on the shaft to yankauer tip for cleansing after use.
Toothbrush	Standard toothbrush design with bristles that may detach	Silicone toothbrush provides soft but firm bristles. Single molded design ensures bristles do not fall off.



INTERNAL USE ONLY

Images not to scale

Competitive Products – Sage/Stryker & Medline

Comparative Market Share Estimates: SAGE: ~65%, Ballard: ~20%, MEDLINE: ~15%



Medline:

- Full line of products: Fast follower to Sage
- Lowest Cost player
- Low Quality
- Introduced combined CPC + Mouth Moisturizer solution similar to Sage
- Full range of products similar to Sage
- Kits often include various component packs thrown into a bag, making tracking of compliance to a protocol challenging
- Leverage Distributor Position to offer savings

Suggestions for “Improvements”

Most of the Requested “Improvements” are due to a comparison with Sage’s product offerings (rarely Medline) e.g.:

Objection / Request for Change	Suggested Response
Combine CPC + Mouth Moisturizer	Combined moisturizer may be suctioned away during application and use of solutions Separate moisturizer application allow product to be applied thoroughly
Provide one-handed tools	Open Thumb Port tools may cause increased risk of cross contamination
Self Care portfolio options	Patients capable of self care are likely able to utilize standard toothbrushes
Oral Care kit for edentulate (dentures/no teeth) patients	No current offering in Ballard portfolio specifically for this

Oral Care: Contracts

Neal Harpstrite	261	National	Oral Care	10/30/2026	Sole	Oral care product line
Kellie Vande Woude	PP-NS-1620	Premier	Oral Care	7/31/2025	Multi	Ballard Oral Care
Kellie Vande Woude	PP-OR-1620	Alliant	Oral Care	7/31/2025	Multi	Oral Care
Kellie Vande Woude	PP-NS-1620	Capstone	Oral Care	7/31/2028	Multi	Oral Care
Derrick Tsou	10002976	MNS	aptitude agreement Oral Care	12/31/2025	Sole	Ballard Oral Care
Derrick Tsou	MS8190	MSS	Oral Care	12/31/2025	Sole	Ballard Oral Care
Derrick Tsou	10007544	West Coast Purchasing Coalition	aptitude agreement Oral Care	12/31/2025	Sole	Pre-packaged Oral Care
Kellie Vande Woude	PP-NS-1620	Yankee Alliance	Oral Care	7/31/2025	Multi-Green	Oral Care



INTERNAL USE ONLY

Oral Care: Highest Volume Codes

- 97021 | BALLARD 24 Hour Oral Care Q4 Kit
- 97014 | BALLARD 24 Hour Oral Care Q4 Kit w/ CHG
- 97020 | BALLARD 24 Hour Oral Care Q2 Kit
- 97012 | BALLARD 24 Hour Oral Care Q2 Kit w/ CHG
- 99789 | BALLARD OC PREP PK,40
- 12262 | BALLARD MOUTH MOISTURIZER,0.35OZ,144
- 12260 | BALLARD OC SWAB KIT,50
- 33971 | BALLARD SCT SWAB PK BURST CUP,80
- 99791 | BALLARD OC TOOTHBRUSH PK,40
- 33970 | BALLARD SCT SWAB BLK PK BURST CUP,40
- 12263 | BALLARD HYDRO PEROX ORAL RINSE MINT,100

Oral Care: Questions to Ask

- Do you currently use the Sage kit with open thumb ports?
- What have you found to be the pros and cons of the current product?
- What quality improvement projects are you working on currently? (infection control)?
- Are you using the oral care kit that is on your GPO contract?
- What are you using for oral care in areas outside your ICUs?

Oral Care: Key Selling Points

- Built to drive compliance
- Color coded for ease of use
- Closed system with on/off switch
- GPO Position: Sole Source HealthTrust

Resources:

- Oral Care Brochure
- NVHAP Study
- Oral Care In-Service Video

*Prime Targets:

- Sole Source contract with HealthTrust
- Customers that use our kit in ICU only could use our Mini-Kit in other areas.

Oral Care: Objection Handling

Too many pieces

Only the suction handle is additional...this allows for secretions to flow through instead of escape out of the suction hole.

Tools fall off the suction handle

This is an educational issue. If you push and twist the tool onto the suction handle, it will stay on securely.

I like the burst pouch

You can burst with the Ballard brand if needed. However, we suggest using the tray as a workstation instead.

I like the combined moisturizer/CPC

With this approach, the moisturizer may get suctioned out instead of staying on the patient.



Medication Delivery

INTERNAL USE ONLY

Market Dynamics Overview

Total Market Size

- **Total Addressable Market** **\$397.8M**
 - Domestic (Acute) \$156.2M – 39.3%
 - Domestic (Ext. Care) \$31.2M – 7.9%
 - International (if applicable) \$210.4M – 52.9%
- **Market Leaders (Domestic Acute Only)**
 1. Aerogen \$46.3M – 29.6%
 2. Monaghan \$27.4M – 17.5%
 3. Medline (includes Hudson) \$18.1M – 11.6%

Source: Clarivate, International team and Ashley's industry knowledge

AirLife Market Share (TTM)

- **AirLife Market Share** **\$28.0M – 7.1%**
 - *Domestic:* **\$24.5M – 85%**
13% of total Dom. Market
 - *International:* **\$4.1M – 15%**
1.9% of total Int'l Market

Head Winds

- Manufacturing transfers have created BO
- Performance testing
 - Additional SKU Rationalization opportunities pending testing
 - New VixOne tooling in process
- New ISO standard for O₂ tubing connector to bottom of Nebs¹
- Opportunity for product line improvements delayed
 - Peak Flow Meter new supplier
 - Compressor new supplier (homecare)

Tail Winds

- *HCA contracts*
- *Salter EUMDR complete (except NebuTech)*

Selling the Portfolio

Lead with NebuTech in **every** account

- GPO contract compliance
- Importance of first 1/3 dose inhalation
- < 5 min treatment
- Cost Savings (vs Monaghan and Aerogen spontaneous treatment in ED)



Spacer/Chamber

- MDI



SVN

- Low cost, high-volume



Continuous

- 1+ hour constant treatment



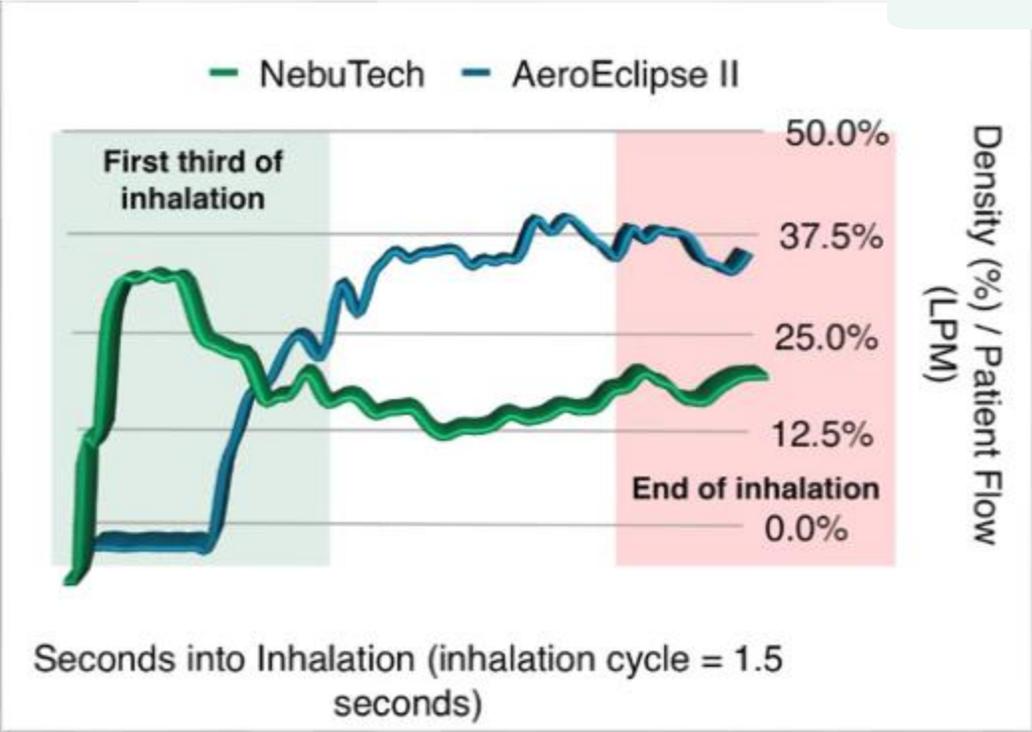
Filtered

- Immunocompromised patient

AirLife offers a complete nebulization portfolio to meet the needs of the customer

Effective aerosol delivery

80% of particles in the respirable range



First 250ml of inhalation	Entire Inhalation Cycle	Device
249 ± 40	469 ± 64	NebuTech
73 ± 20	309 ± 33	AeroEclipse II

Know the Competition

- Leading Competitor: Monaghan
- Product: AeroEclipse BAN
- Product Features:
 - Breath Actuated Nebulizer - Upon inhalation it begins to create aerosol, when inhalation ceases, it stops nebulizing
- No medication waste
- Product Weaknesses:
 - Difficult for sick patients to actuate
 - Long treatment time
 - Cannot use breath-actuated mode with a mask
- Selling Strategy:
 - Brand Recognition
 - Superior drug delivery backed by studies
 - Tandem Therapy with Aerobika
 - Strong specialty distribution support



How do we compare to our competition?

	NebuTech	AeroEclipse BAN
Treatment Time	<5 minute	Varies dependent on patient breathing pattern, mode and medication
Particle Size (MMAD)	MMAD 3.5 μm	MMAD 2.8 – 3.4 μm (depends on source)
Mask option	Works the same with and without mask	Must be used in Continuous Mode with mask
Manufacturing location	North America	North America
Market Strategy	Leverage GPO contract position, product performance and treatment time to promote clinical benefits	Leverage multiple studies and strong brand recognition to promote drug delivery and deposition
Pricing	\$3 – 4	\$5 – 6

Medication Delivery

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	Mexico/China	Medium (SVN – High)	HealthTrust, Vizient, Ascension, Premier	
Flexicare	China	Medium (SVN – High)	None	Unknown
Medline	Mexico	Medium (SVN – High)	HealthTrust, Vizient, Premier	Unknown
Monaghan	US, Canada	Medium	HealthTrust, Vizient, Premier	Unknown
Philips	US	Medium	Unknown	Unknown

Med Delivery: Contracts

Neal Harpstrite	74255	National	Respiratory, Oxygen Delivery Devices	10/31/2025	Multi	Salter Labs O ₂ Cannulas, Masks, Tender Grip Humidifiers
Neal Harpstrite	73822	National	Respiratory, Oxygen Delivery Devices	10/31/2025	Multi	SNET, ALO, HFNC, EtCO ₂ , O ₂ Tubing
Neal Harpstrite	75171	National	Respiratory, Oxygen Delivery Devices	10/31/2025	Multi	Westmed O ₂ Tubing, Comfort Soft Plus, Masks
Kellie Vande Woude	AD-NS-1755	AscenDrive	AscenDrive Respiratory Therapy Products: Medication Delivery and Bronchial Hygiene	8/31/2026	Dual	All 1752 and 1755 contracted products
Kellie Vande Woude	PP-NS-1752	Premier	Medication Delivery - SunMed	8/31/2026	Multi	Salter and Westmed Med Delivery
Kellie Vande Woude	PP-NS-1755	Premier	Respiratory Therapy Products: Medication Delivery and Bronchial Hygiene - Vyaire	8/31/2026	Multi	Vyaire Med Delivery
Derrick Tsou	MS1098	National	Medication Delivery Devices	3/31/2027	Multi	VixOne, NebuTech, Misty Fast, Mist Max, nebulizers, peak flow meters Airway Mgmt Impact standardization 2%
Derrick Tsou	ASCEN-0089711	National	Medication Delivery	3/31/2025	Multi	NebuTech, VixOne, Nebulizers, O ₂ Mask/Tubing, EtCO ₂ Cannula, HFNC

Med Delivery: Contracts

Kellie Vande Woude	PP-NS-1752	Acurity	Medication Delivery - SunMed	8/31/2026	Multi	Salter and Westmed Med Delivery
Kellie Vande Woude	PP-NS-1752	Alliant	Medication Delivery - SunMed	8/31/2026	Multi	Salter and Westmed Med Delivery
Kellie Vande Woude	PP-NS-1755	Alliant	Respiratory Therapy Products: Medication Delivery and Bronchial Hygiene - Vyair	8/31/2026	Multi	Vyair Med Delivery
Kellie Vande Woude	PP-NS-1752	Capstone	Medication Delivery - SunMed	8/31/2026	Multi	Salter and Westmed Med Delivery
Blair Hobgood	RESP5	Partners Cooperative	Medication Delivery	6/30/2027	Multi	VixOne, Heart Nebs, Circulaire II
Kellie Vande Woude	YS-NS-158	Yankee Alliance	Medication Delivery	8/31/2026	Multi - Green	All nebulizers (Salter and SunMed), Westmed Soft Cannulas

Med Delivery: Highest Volume SKUs

- 002446 | MM10 SVN W/T M/P FLEX U/C-IT TBG 50/CS
- 8960-7-50 | NEBUTECH DISPOSABLE NEBULIZER, MOUTHPIECE, UNIVERSAL MASK ADAPTER, 7' TUBING -50/CS
- FN2438 | MISTY FAST SVN W/BAF MP 6"FLEX 7' O2 TBG
- 100612A | MINI-HEART HI-FLO CONTINUOUS NEBULIZER,ADLT AERO.MASK, 7'
- 002534 | MISTY FINITY MED VOL HI-FLO CONT. NEB
- FN2446 | MISTY FAST SVN W/BAF MP 6"FLEX 7' U/CTB
- 0210 | VIXONE NEBULIZER
- 8960TG-7-50 | NEBUTECH DISPOSABLE NEBULIZER, MOUTHPIECE, UNIVERSAL MASK ADAPTER, 7' TUBING W/THREAD GRIP -50/CS
- 002533 | MISTY FINITY MED VOL HI-FLO CONT. NEB
- 124030EU | AIRLIFE FILTERED NEBULIZER

NebuTech: Questions to Ask

- What do you currently use? Do you use a high efficiency nebulizer?
- What have you found to be the pros and cons of the current product?
- What quality improvement projects are you working on currently?
- How are you using the BAN? Continuous mode or breath actuated mode?

NebuTech: Key Selling Points

- First 1/3 of breath medication delivery (deeper, longer)
- BAN: Some patients too sick to actuate with breath
- NebuTech is Breath Enhanced vs BAN (breath actuated)
- Cannot use AeroEclipse in Breath Actuated mode with a mask
- NebuTech can be used with mask or mouthpiece
- NebuTech is less expensive, bring into AirLife Enterprise deal

***Prime Targets:**

- On contract with HealthTrust, Vizient, Ascension, Premier, & VA FSS Contract
- Accounts that are using the BAN in continuous mode
- NIV Sole Source Encompass Health (Vizient)

Resources:

- NebuTech Brochure
- Med Deliver Study
- NebuTech In-Service Video

NebuTech: Objection Handling

I like my AeroEclipse BAN

Most are use in continuous mode, not breath actuated mode. Thus, customers are overpaying for Monahan.

Breath actuated is harder to activate than our NebuTech breath enhanced product.

BAN cannot be used with a mask in breath actuated mode.

The BAN has multiple studies

Monahan is owned by Trudell, who is the one doing the studies

I have a good relationship with my AeroEclipse rep

Monahan's strength is branding, marketing, hiring speakers, reps, lunches, etc.

AeroEclipse has optimum particle size

Our products have been shown to have particle sizes well within the range of effective treatment.



Oxygen Delivery

INTERNAL USE ONLY

Market Dynamics Overview

Total Market Size*:

- Total Addressable Market - \$638M
 - Domestic - \$200M
 - International - \$438M
- Market Leaders (US only, including homecare)
 1. AirLife - \$72.2M and 36%
 2. Medline - \$58M and 29%

AirLife Market Share:

- AirLife Market Share - \$86.8M and 13.6%
 - Domestic - \$72.2M and 36%
 - International - \$14.6M and 2.2%

SOURCE: GXH, Clarivate, Ben Green

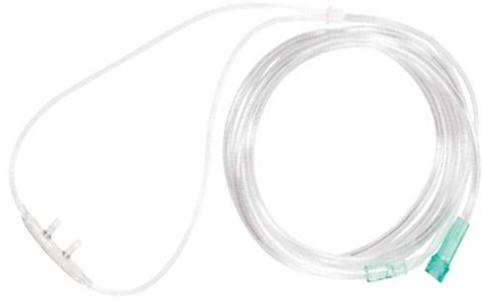
Head Winds:

- O₂ Design Consolidation
- Manufacturing site moves
- Low cost / improving quality cannulas from China driving price down, particularly in home care
- Increasing labor rates in Mexico

Tail Winds:

- GPO contract position
- Brand recognition/Quality
- AirLife Agreement inclusions

Common Devices for O₂ Delivery – Multiple Options



Nasal Cannula

Flows 1 – 6 | O₂ 24 - 40%



Simple Mask

Flows 5 -10 | O₂ 35 - 50%



Venti Mask

Flows 2 -12 | O₂ 24 - 50%



Non-Rebreather Mask

Flows 10 – 15 | O₂ 60 - 80%



AirLife Open Mask

Flows 1 - 15 flush | O₂ 25 - >81%



Salter High Flow Nasal Cannula

Flows 6-15

AirLife Open Oxygen Mask

Delivers a wide range of oxygen from 1-15 LMP using single device

Institutional or transport use

Item	Description
AM-1000	AirLife Open Oxygen Mask - Medium
AM-1100	AirLife Open Oxygen Mask - Large
AM-1200	AirLife Open Oxygen Mask - Small

Benefits

Safety

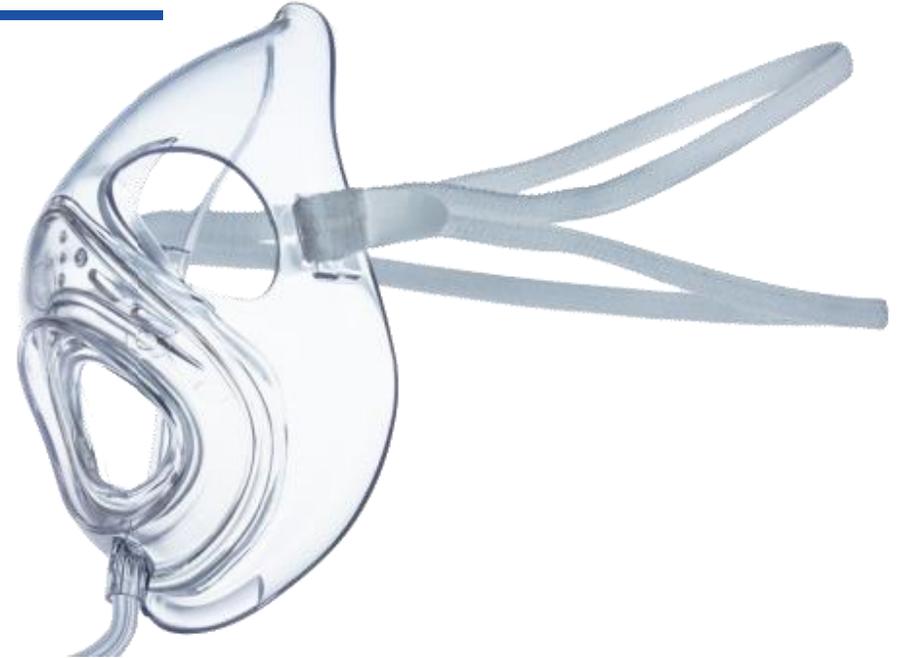
- Less set-up errors
- Easy to train
- Reduced CO₂ re-breathing
- Provide care without removing mask

Comfort

- Split straps, Less ear irritation
- Quiet soft curtain of oxygen
- Improved communication
- Less claustrophobia
- Better patient compliance

Performance

- Delivers wide range of O₂
- Less need to switch devices
- 4% higher FiO₂ than OxyMask
- Oral opening for procedures and patient care



OxyMask



[OxyMask Technology](#)
(3:57)

AirLife Open Strategy

ALO vs OxyMask

- Leverage the hospital's adoption and familiarity of open mask technology
- Bifurcated straps eliminate pressure sores on ears
- Distributed flow of O₂ through the multiple orifices instead of OxyMask's pin diffuser (positional mask) eliminates rubbing on patient's nose
- No need to move tubing out of the way when speaking or eating/drinking
- 4% higher FiO₂s, measured at the trach instead of lips for a more accurate reading

ALO vs simple, venturi, rebreather and non-rebreather masks

- SAFETY!
 - ALO can go down to 1 LMP. A patient can be harmed from rebreathing CO₂ if on <5 LMP with regular masks
 - Nursing taking on more RT duties post COVID
- Better patient compliance can potentially keep patients off high flow (expensive capital equipment)

[Recent ALO wins with Heidi Powell vs OxyMask](#)
(10:13)

[Recent ALO Wins with Heidi Powell vs Traditional Masks](#)
(10:19)

[AirLife Open How to Video](#)
(2:27)

[AirLife Open Key Features Video](#)
(1:51)

O₂ Competition

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	Mexico	High	Premier, HPG, Vizient	No Increase
Medline	China/Canada	High	Premier, HPG, Vizient	Mild Increase

O₂ Delivery: Contract

Neal Harpstrite	75866	National	Respiratory, Nebulizers, and Kits	7/31/2025	Multi	Westmed Circulaire, VixOne, Aerosol Masks
Neal Harpstrite	75830	National	Respiratory, Nebulizers, and Kits	7/31/2025	Multi	Small Volume Nebulizers MistyFast and Accessories
Neal Harpstrite	75868	National	Respiratory, Nebulizers, and Kits	7/31/2025	Multi	Salter Labs NebuTech—This contract replaces HPG-6054
Neal Harpstrite	74255	National	Respiratory, Oxygen Delivery Devices	7/31/2025	Multi	Salter Labs O ₂ cannulas, masks, tender grip humidifiers
Neal Harpstrite	73822	National	Respiratory, Oxygen Delivery Devices	7/31/2025	Multi	SNET, ALO, HFNC, EtCO ₂ , O ₂ Tubing
Neal Harpstrite	75171	National	Respiratory, Oxygen Delivery Devices	7/31/2025	Multi	Westmed O ₂ Tubing, Comfort Soft Plus, Masks
Kellie Vande Woude	PP-NS-1740	Premier	Respiratory Disposables - SunMed	8/31/2026	Multi	O ₂ Cannulas, Masks, and ALL Capnography
Kellie Vande Woude	PP-NS-1744	Premier	Respiratory Therapy Products: Respiratory Disposables - Vyair	8/31/2026	Multi	SNET, ALO, HFNC, EtCO ₂ , O ₂ Tubing
Kellie Vande Woude	PP-NS-1755	Premier	Respiratory Therapy Products: Medication Delivery and Bronchial Hygiene - Vyair	8/31/2026	Multi	Vyair Med Delivery



INTERNAL USE ONLY

O₂ Delivery: Contract, part 2

Kellie Vande Woude	PP-NS-1763	Premier	Respiratory Therapy Products: Resuscitation Devices - Vyair	8/31/2026	Multi	Vyair Resuscitation
Derrick Tsou	MS1089	National	Respiratory Disposables	3/31/2027	Multi	AirLife Open, Inhalation / sterile water, O ₂ mask, O ₂ Tubing, HME, HFNC, GE-validated ECG cables and leadwires, EtCO ₂ cannulas Airway Mgmt Impact standardization 2%
Derrick Tsou	10005907	CAPTIS	Respiratory Disposables	6/30/2025	Multi	AirLife Open, Inhalation / sterile water, O ₂ mask, O ₂ Tubing, HME, HFNC Growth rebate 2% on 10% growth
Derrick Tsou	MS1089AB	Med/Surg Commit	Respiratory Disposables	6/30/2025	Multi	AirLife Open, Inhalation / sterile water, O ₂ mask, O ₂ Tubing, HME, HFNC Growth rebate 2% on 10% growth
Derrick Tsou	VYAIR-0158185	National	Respiratory Therapy	3/31/2025	Multi	AirLife Open, Misty Fast, ET CO ₂ cannula, O ₂ mask/tubing, HFNC, NIV masks, nebulizers
Kellie Vande Woude	GNVHA-NS-031	Acurity	Salter Labs Corporate Contract	8/31/2026	Multi	All Salter Labs Products
Kellie Vande Woude	PP-NS-1740	Acurity	Respiratory Disposables - SunMed	8/31/2026	Multi	O ₂ Cannulas, Masks, and ALL Capnography
Kellie Vande Woude	PP-NS-1740	Alliant	Respiratory Disposables - SunMed	8/31/2026	Multi	O ₂ Cannulas, Masks, and ALL Capnography



INTERNAL USE ONLY

O₂ Delivery: Contract, part 3

Kellie Vande Woude	PP-NS-1744	Alliant	Respiratory Therapy Products: Respiratory Disposables - Vyaire	8/31/2026	Multi	SNET, ALO, HFNC, EtCO ₂ , O ₂ Tubing
Kellie Vande Woude	PP-NS-1755	Alliant	Respiratory Therapy Products: Medication Delivery and Bronchial Hygiene - Vyaire	8/31/2026	Multi	Vyaire Med Delivery
Kellie Vande Woude	PP-NS-1763	Alliant	Respiratory Therapy Products: Resuscitation Devices - Vyaire	8/31/2026	Multi	Vyaire Resuscitation
Kellie Vande Woude	PP-NS-1740	Capstone	Respiratory Disposables	8/31/2026	Multi	O ₂ Cannulas, Masks, and ALL Capnography
Kellie Vande Woude	PP-NS-1744	Capstone	Respiratory Disposables	8/31/2026	Multi	SNET, ALO, HFNC, EtCO ₂ , O ₂ Tubing
John Bowen	KP-11242	Kaiser Permanente	Respiratory Disposables	6/30/2026	Dual	Westmed and Salter Labs Cannulas
Kellie Vande Woude	PP-NS-1740	Yankee Alliance	Respiratory Disposables	8/31/2026	Multi - Green	O ₂ Cannulas, Masks, and ALL Capnography
Kevin Veenstra	36F79718D0536	FSS/VA	Respiratory Disposables	7/31/2028	Multi	Salter Branded. O ₂ , CO ₂ , Med Delivery, tubing
Kevin Veenstra	SP020095H5055	DAPA	Respiratory/Airway Disposables	12/31/2025	Multi	Westmed branded. Limited items: Nebs, Comfort Soft Plus, Anesthesia Circuits
Kevin Veenstra	SP0200-17-H-0040	DAPA	Respiratory Disposables	1/1/2030	Multi	Vyaire Branded



INTERNAL USE ONLY

O2 Delivery: Highest Volume SKUs

- 001361 | MASK OXYGEN MED CONC W/7FT U-CONN-IT TBG
- 001362 | MASK OXYGEN 3-IN-1 W/7FT U-CONN-IT 50/CS
- 001206 | MASK AEROSOL UNDER CHIN ADULT 50/CS
- 0556 | ADULT CANNULA SOFT TIPPED W/7' GREEN TUBING
- 001350 | TUBING OXYGEN 7FT CRUSH RESISTANT 50/CS
- SFT2699 | CANNULA SOFT ADULT W/U-CON 7FT TB 50/CS
- 002061 | ADAPTER VALVED TEE 22 MM OD/ID 30/CS
- 7900-0-25 | BUBBLE HUMIDIFIER UP TO 15 LPM W/ 6 PSI SAFETY VALVE. 25/CS
- 001366 | CANNULA NASAL NONFLAREDD W/U-CONNECT-IT
- 1005-0-25 | TENDER GRIP, SKIN FIXATION SYSTEM. 25 PAIRS.
- 001201 | MASK OXYGEN W/ 7' TUBING
- AirLife Open: AM-1000 (Medium), AM-1100 (Large), AM-1200 (Small)

AirLife Open: Questions to Ask

- How do you handle pressure sores (HAPU/Hospital Acquired Pressure Ulcers) that patients get with non-rebreather or other devices? Any patient complaints?
- Do you stock non-breathers on the floors or are RTs called for masks?
- Do you find nurses titrate to low LMP with non-rebreathers?
- What are your quality goals this year (standardization, sku reduction, process, etc.)
- Who has responsibility for oxygen therapy? What are the challenges?
- How many different versions of cannulas are being used (need SKU reduction)?
- When patients switch oxygen interfaces, is respiratory called?
- Are all interfaces stocked in all areas? Is there a time delay in changing?

AirLife Open: Key Selling Points

- Studies show 4% Higher FiO_2 delivered than OxyMask (measured at the trach which is more accurate)
- Soft curtain of air delivered compared to OxyMask harsh pin diffuser delivery
- Safer than medium concentration mask with no opening (1-4 L will not wash out CO_2 in those masks)
- Depth of mask enhances comfort and may reduce skin breakdown on the nose. Better compliance may reduce need for use of high flow therapy (capital equipment)
- Average cost of \$3.25 and can replace all other masks within 1-15 LMP range (simple cannula, Venturi, rebreather, non-rebreather). Reduced training needed & reduction in SKUs;

AirLife Open: Key Selling Points

- Ability to adjust gas flow rates from 1 L to 15 L or flush depending on patient's needs without switching masks; thus, as the patient's condition improves or deteriorates – clinicians can remain at the patient's bedside during critical moments
- Dual strap more comfortable, does not aggravate ears/skin like OxyMask which has a single strap.
- Mask opening aids in the mitigation of CO₂ rebreathing due to the openings in the ALO
- Helps to reduce the possibility of aspiration pneumonia should the patient vomit while wearing the ALO

AirLife Open: Key Selling Points

- Can eat/drink, talk, med delivery, hygiene, or have procedures through front opening without interrupting oxygen therapy. O₂ supply tubing below opening.
- Not dependent on mask position to deliver effectively like OxyMask
- Higher patient compliance may keep patients off high flow (capital equipment use)
- Cannulas: HAPU and associated costs (\$10,708 per, 2.5 mil/yr) may be prevented with softer style cannulas

***Prime Targets:**

- Current OxyMask users
- On HealthTrust, \$3.25 ea, on VA FSS Contract
- On Premier (sole on AscenDrive) Acension, and Vizient

Resources:

- AirLife Open Literature Sheet
- OxyMask xRef Sheet
- OxyMask Customer List
- Groepenhoff Comparative Study
- AirLife Open Clinical Use Survey
- Testing data vs OxyMask
- Testing data vs Simple Mask & Rebreather

AirLife Open: Objection Handling

We like the OxyMask

Studies have shown (Groepenhoff) the AirLife Open delivers higher FiO_2 than OxyMask.
Softer air delivery, less dependent on patient position, more comfortable strap with AirLife Open

We already use our simple masks and rebreathers

Studies show AirLife Open delivers more consistent FiO_2 than simple masks and rebreathers (less variability)

I'm not sure AirLife Open can really replace all our current masks

Studies have shown excellent results at varying therapy levels.

We are fine with our current cannulas

We may be able to reduce your HAPU with softer cannulas may reduce number of SKUS



Resuscitation / Hyperinflation

INTERNAL USE ONLY

Resus Market Dynamics Overview

Total Market Size:

- **Total Addressable Market** **\$190M**
 - Domestic \$80M
 - International \$110M
- **Market Leaders (Domestic Only)**
 1. Ambu \$25M – 32%
 2. AirLife \$18M – 23%
 3. Medline \$9M – 11%
 4. Mercury Medical \$8M – 10%

Source: Market size and share data are obtained from Clarivate, AirLife internal PowerBI targeting tool, AirLife international sales team (with data from World Bank, WHO and European publications)

AirLife Market Share:

- **AirLife Market Share** **\$19.4M – 10%**
 - Domestic \$18.2M – 23%
 - International \$1.2M – 1%

Head Winds:

- Manufacturing transfer backorder (~272k branded, \$790k total)
- Vyair Resus Sku rationalization (last time buy 3/31/2025)
- No contract position with Vizient
- Product portfolio is not available to the international market because they are not MDR certified (Engineering is working to remove DEHP in 2024)

Tail Winds:

GPO Contract Position

- HPG National Contract – dual-source renewal from 3/1/24 to 2/28/26
- HCA Contract – sole-source to displace Ambu in the west coast in Q4
- Premier Contract – multi-source renewal from 5/1/23 to 8/31/26

Strong value proposition for customers

- "Best in class" resus bag (according to AirLife internal clinicians) that includes patented integrated manometer and newly-developed NPV
- Competitive pricing for fully-loaded bag

Hyper Market Dynamics Overview

Total Market Size:

- **Total Addressable Market**
 - Domestic \$35M
 - International TBD
- **Market Leaders (Domestic Only)**
 1. AirLife \$11M – 33%
 2. Mercury \$11M – 33%
 3. Medline \$5M – 15%

AirLife Market Share:

- **AirLife Market Share** \$12.0M – %
 - Domestic \$11.3M – 33%
 - International \$0.7M – %

Source: Market size and share data are obtained from Clarivate and AirLife internal PowerBI targeting tool

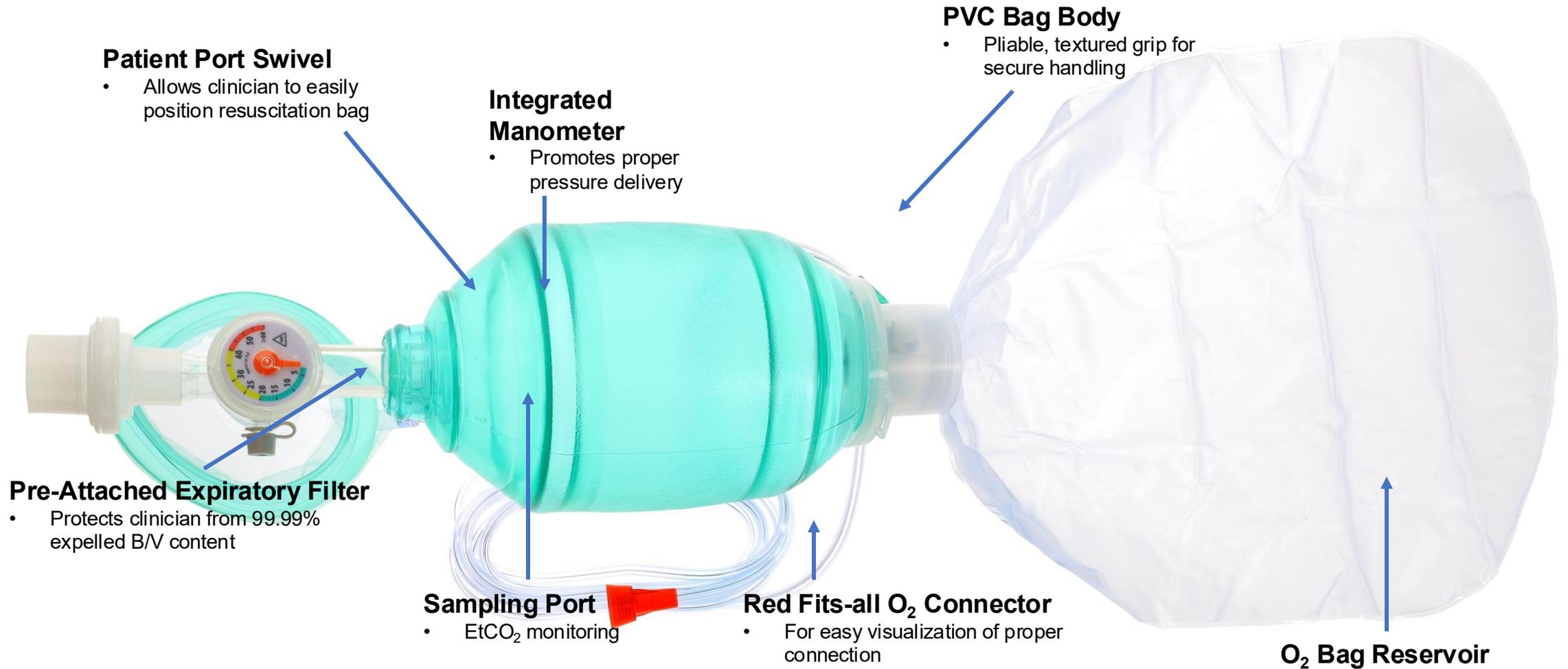
Head Winds:

- No contract position with Vizient or DAPA/FSS
- Vyaire Resus Sku Rationalization
- Ventlab Hyper comes from China (tariff risk)

Tail Winds:

- **GPO Contract Position**
 - HPG National Contract – dual-source renewal from 3/1/24 to 2/28/26
 - HCA Contract – sole-source to displace Ambu in the west coast in 2024 Q4

AirFlow Resuscitation Bags: Key Features



Resuscitation Accessories



Filter

- Our resus filters are 99.99% effective and filter out many of these concerns



Manometer

- Promotes proper pressure delivery and helps reduce the risk of barotrauma and/or VAE; helps promote safer patient transports (target same pressure / Vt as on ventilator)



PEEP

- Pressure range: 5-20 cm H₂O
- PEEP reduces the work of breathing.



CO₂ Indicator

- Designed for fast, easy airway assessment

How do we compare to our competition

	AIRFLOW - NPV	AMBU	MERCURY
Manometer Accuracy	+/- 3 cmH ₂ O up to 15 cmH ₂ O	+/- 2 cmH ₂ O up to 30 cmH ₂ O	+/- 3 cmH ₂ O up to 15 cmH ₂ O
Filter Attached	Filter comes attached in standard configuration	Not available or listed as accessory in IFU	Not available attached
PEEP	Adjustable between 5-20 cmH ₂ O	Adjustable between 1.5-20 cmH ₂ O	Adjustable between 0-20 cmH ₂ O
Sampling Port	Standard on all configurations	Standard on all configurations	Not Available
MR Conditional	7 Tesla MR Conditional	7 Tesla MR Conditional	3 Tesla MR Conditional
Market Strategy	Lead with fully loaded bag and sell on clinical benefits of integrated manometer and pre-attached filter	Lead with stripped down bag and sell on “tactile feel and visual feedback”	Focus on the full line, emphasizing the in-line manometer and flip pop-off
Pricing	Medium	Low	High
GPO Contract	HealthTrust and Premier	All Contracts	None

How do we compare to our competition

Ambu (Spur 2)



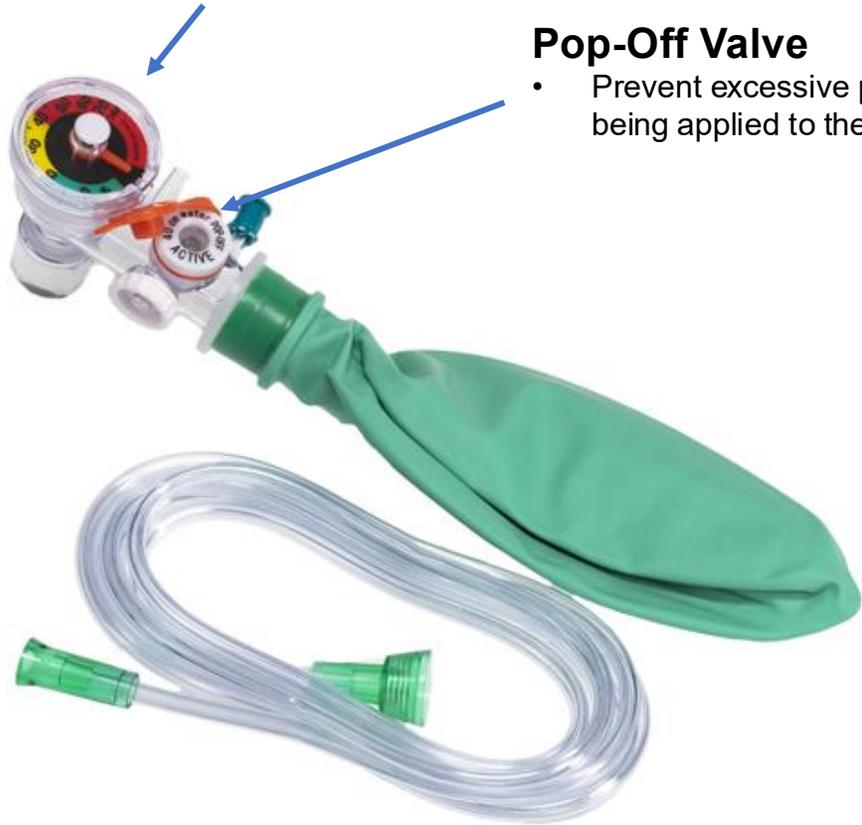
Mercury Medical



Hyperinflation System Overview

Integrated Manometer

- Promotes proper pressure delivery



Pop-Off Valve

- Prevent excessive pressure from being applied to the lungs



Stay-Put Dial

- Comes standard to enable clinician to achieve targeted static pressure

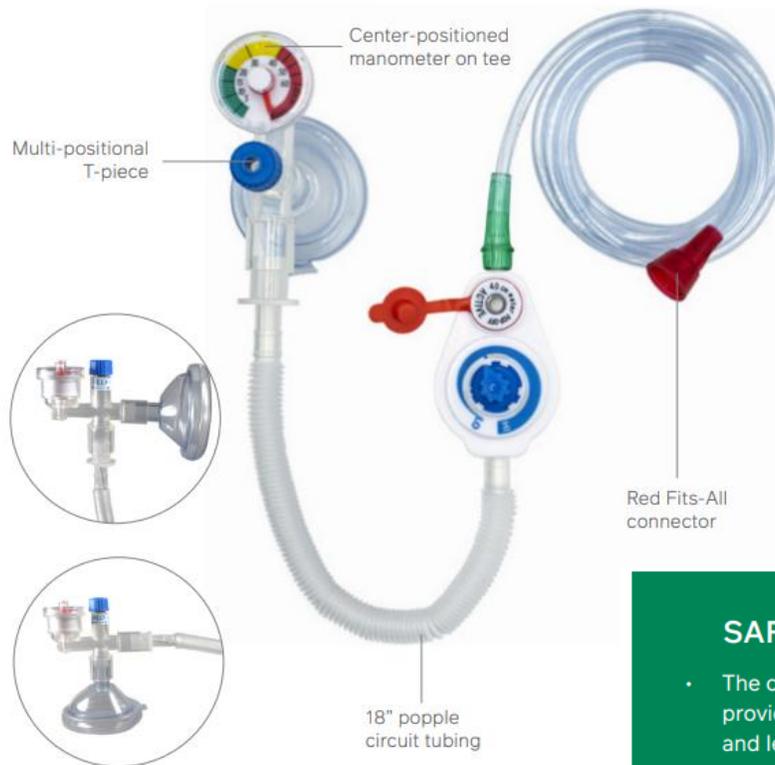


4 Sizes

- 0.5L, 1L, 2L, 3L

Mercury Medical Competitive Comparison

AIRLIFE™ SAFET™ T-PIECE RESUSCITATOR



COMMON FEATURES

- In-line manometer on tee
- Manometer Accuracy
+/- 3 cm H₂O for 0-15 cm H₂O
+/- 5 cm for > 15 cm H₂O
- Requires continuous O₂ flow
- Can provide CPAP
- Single, complete device
- Disposable
- Portable
- Adjustable PIP
- Adjustable PEEP
- Pressure relief valve

SAFET™ UNIQUE DIFFERENTIATORS

- The centered manometer on the T-Piece provides better visibility for both right- and left-handed clinicians.
- The multi-positional T-piece is helpful when viewing from a lower angle or baby is on his side.
- Popple circuit tubing provides variable lengths without additional clutter.
- Both SafeT and Neo-Tee contain phthalates. SafeT contains DEHP, and Neo-Tee contains DINP.

MERCURY MEDICAL® NEO-TEE® T-PIECE RESUSCITATOR



Competitive Landscape

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	Mexico	Low (Hyper) / High (Resus)	HPG, Premier	-
Ambu	Mexico China	Low (Hyper) / High (Resus)	HPG, Premier, Vizient	Unknown
Medline	Mexico	Low (Hyper) / High (Resus)	Premier, Vizient (RFP)	Unknown
Fisher & Paykel	New Zealand	Low (T-piece)	None	Unknown
Mercury Medical	Malaysia	Low (Hyper) / High (Resus)	Premier HPG (Neo-Tee) Vizient (RFP)	Unknown
Medtronic	Mexico	Low (CO ₂ indicator)	None	Unknown

Resus / Hyperinflation: Contracts

Neal Harpstrite	2513	National	Resuscitation and Hyperinflation Bags	2/28/2026	Dual	AirFlow, Hyper, Masks, PEEP, Bougies, MaxCap
Kellie Vande Woude	PP-NS-1761	Premier	Resuscitation - SunMed	8/31/2026	Multi	AirFlow, Hyper, Masks, PEEP, SafeT, CO2 Easy
Kellie Vande Woude	PP-NS-1763	Premier	Respiratory Therapy Products: Resuscitation Devices - Vyaire	8/31/2026	Multi	Vyaire Resuscitation
Kellie Vande Woude	PP-NS-1761	Acurity	Resuscitation - SunMed	8/31/2026	Multi	AirFlow, Hyper, Masks, PEEP, SafeT, CO2 Easy
Kellie Vande Woude	PP-NS-1761	Alliant	Resuscitation - SunMed	8/31/2026	Multi	AirFlow, Hyper, Masks, PEEP, SafeT, CO2 Easy
Kellie Vande Woude	PP-NS-1763	Alliant	Respiratory Therapy Products: Resuscitation Devices - Vyaire	8/31/2026	Multi	Vyaire Resuscitation
Kellie Vande Woude	PP-NS-1761	Capstone	Resuscitation Devices	8/31/2026	Multi	AirFlow, Hyper, Masks, PEEP, SafeT, CO2 Easy
Kevin Veenstra	MS0880EX	Excelerate	Disposable Manual Resuscitators	3/31/2026	Sole	Resuscitation Bags
Derrick Tsou	10011679	NPC	aptitude agreement Disposable Manual Resuscitators	7/31/2027	Dual	AirFlow, Hyper, Masks, PEEP
Kellie Vande Woude	PP-NS-1761	Yankee Alliance	Resuscitation	8/31/2026	Multi - Yellow	AirFlow, Hyper, Masks, PEEP, SafeT, CO2 Easy
John Bowen	SUN-317252	Mayo Clinic	Hyperinflation Bags	4/30/2026	Sole	Custom contract - hyperinflation bags
Blair Hobgood	RESP34	Partners Cooperative	Hyperinflation Bags (contract extension in process)	1/31/2025	Sole	Westmed Hyper-Inflation Bag



INTERNAL USE ONLY

Resus / Hyperinflation: Highest Volume SKUs

- AF5140MB | AIRFLOW ADULT WITH BAG RES, MANO, FILTER & MASK
- AF5040MBP | AIRFLOW ADULT WITH BAG RES, FILTER, PEEP & MASK
- AF5140MBP | AIRFLOW ADULT WITH BAG RES, MANO, FILTER, PEEP & MASK
- 2K8005 | RESUS, ADLT W/MASK, 40" TBG, 6/CS
- 2K8004 | RESUS, ADLT W/MASK, RESV BAG, 6/CS
- 2K8036 | RESUS, ADLT W/MASK, 40" TBG, PEEP 6/CS
- AF5040MB | AIRFLOW ADULT WITH BAG RES, FILTER & MASK

*AirFlow exclusive with Tri-Anim (hyper is not exclusive)

Resus / Hyperinflation: Questions to Ask

- What products are you currently using for Resuscitation / Hyperinflation?
- What accessories do you use? Are they attached (filter, manometer, peep)?
- How might it help if accessories were already attached (safety, time savings)?

[AirFlow Training Video](#)

(8:55)

[Hyperinflation System Training Video](#)

(10:55)

Resus / Hyperinflation: Key Selling Points

- Filter (for Resus) & Manometer already attached ensures safety (poss reduced insufflation, vomiting, pneumonia, etc.)
- Reduce SKUs if product has attachments already
- Training protocols and treatments more uniform & more consistent with accessories already attached.
- Better accommodates traveling and new nurses not as familiar with protocols.
- Saves time of having to find and attach components in critical life-saving situations.

***Prime Targets:**

- Resus/Hyper on contract with HealthTrust (sole w/ HCA, sold direct),
On Vizient & Premier through Tri-Anim.

Resources:

- Tri-Anim Rep (AirFlow exclusive)
- Demo Kit (VT1000)
- Product Brochures
- Product Guides
- Product Videos

Resus / Hyperinflation: Objection Handling

This is more expensive than current Ambu

The AirFlow comes with important safety features (compare cost of individual components). Ambu costs more than we do with these components attached.

We don't need a monometer, our therapist know what they are doing

A monometer provides important safety measures during critical situations, especially for less experienced staff. I don't need a speedometer but glad I have one when I see a policeman.

When transporting patient, monometer allows you to match PIP patient was getting from vent, remaining close to the tidal volume they were getting with the vent.

We don't need a filter

A filter protects the staff since the patients' infection condition is often unknown.

Note: Fits-all Connector is red so clinician can easily identify that it is connected to the flowmeter.



HME - HMEF

INTERNAL USE ONLY

HME/HMEF Product Portfolio

	HME		HMEF		BV and HEPA Filters	Trach HME	Other
Product	HME	HME with Flex	HMEF	HMEF with Flex	Bacterial Viral HEPA	Adult & Pediatric Trach HME	Other
Picture							
Sizes (mL)	<ul style="list-style-type: none"> • Neonatal/Infant (15-50) • Small (80-600) • Medium (90-1000) • Large (250-1500) 	<ul style="list-style-type: none"> • 150-1500 	<ul style="list-style-type: none"> • Infant (20) • Small (60-500) • Medium (150-1500) • Large (250-1500) 	<ul style="list-style-type: none"> • Medium (90-1000) • M/L (300-1000) 	<ul style="list-style-type: none"> • Medium (250-1250) • Large (150-1500) 	<ul style="list-style-type: none"> • Pediatric (500) • S/M (45-1000) • M/L (70-1000) 	<ul style="list-style-type: none"> • PFT • HME/HMEF Bypass
Features	With and without port		With and without port		With and without port	With and without port	

[Ventlab HCH HME Literature Sheet](#)

Market Dynamics Overview

Total Market Size:

- **Total Addressable Market**
 - Domestic - \$77M
 - International - \$N/A
- **Market Leaders**
 1. Teleflex - \$20.8M and 27%
 2. AirLife - \$17.0M and 22%
 3. Medline - \$6.8M and 9%
 4. Medtronic - \$4.0M and 5%

Source: Market size and share data are obtained from Clarivate

AirLife Market Share:

- **AirLife Market Share** - **\$19.7M**
 - Domestic - \$17.0M
 - International - \$2.7M

Head Winds:

- Product category is not a focused category
 - There are only 12 Salesforce open pipeline opportunities at stage4+
- Product gap with bypass HMEF and in non-acute markets (O2 concentrator and CPAP filters)

Tail Winds:

- Product is included on GPO contracts under broader product category
- HPG (Respiratory Ventilator Circuits 75865 & 75824, multi-source, ends 2/28/26)
 - Premier (Resp Therapy Products: Resp Disposables-Vyaire PP-NS-1744, multi-source, ends 8/31/26 & Anesthesia Disposables-SunMed PP-OR-2224, multi-source, ends 7/31/26)
 - Vizient (Resp Disposables MS1086 & MS1089, multi-source, ends 3/31/25)

Received EU MDR Authorization for HME/HMEF (BSI Certificate MDR 761256) on 2/9/24

Many product gaps filled with Vyaire and Avanos products

Competitive Landscape

	AirLife	Teleflex	Medtronic	Medline
HME	Yes	Yes	Yes	Yes
HME with Flex	Yes	Yes	Yes	Yes
HMEF	Yes	Yes	Yes	Yes
HMEF with Flex	Yes	Yes	Yes	Yes
BV & HEPA	Yes	Yes	Yes	Yes
Trach	Yes	Yes	Yes	Yes
PFT	Yes	No	No	Yes

Competitive Pricing

AirLife					Teleflex	Medtronic	Medline
	Low GPO	High GPO	AirLife ASP	Clarivate ASP(SunMed/SM+Vyaire)	Clarivate ASP	Clarivate ASP	Clarivate ASP
HME	SKU 003004				SKU 11112	SKU 353U5413	N/A on Clarivate
	\$1.05	\$1.87	\$1.16	\$1.33 / \$1.80			
	SKU FH603007				\$1.35	\$1.34	
	\$0.59	\$1.25	N/A	N/A / N/A			
HMEF	SKU 003021				SKU RGH940U	SKU 351U5856	SKU DYNJAAHME5
	\$3.69	\$4.98	\$3.54	\$3.93 / \$4.23			
	SKU FH603008				\$2.63		\$1.50
	\$0.87	\$1.31	\$1.07	\$1.01 / N/A		\$2.26	
BV	SKU 001851				SKU RGF605U	SKU 350U5865	SKU DYNJAABV1
	\$0.70	\$0.95	\$0.80	\$0.75 / \$0.87	\$0.87	\$1.00	\$0.67
HEPA	SKU 303HEPA				SKU 28022	SKU 351U5878	SKU DYNJAAHF
	\$1.48	\$2.65	\$2.23	\$2.28 / \$1.43	\$2.31	\$2.29	\$2.30
Trach HME	SKU 1190				SKU RGH912U	SKU 353U19004	SKU DYNJAAHME30
	\$1.34	\$2.21	\$1.45	N/A	\$1.83	\$1.28	\$1.70

HME: Contracts

GPO	GPO Contract Number	Contract Description	TIER Description	Effective Date	Expiration Date
HealthTrust	75824	Respiratory- Vents & Circuits	TIER 1: COMMITTED - 80% Commitment	3/1/2024	7/31/2027
HealthTrust	75824	Respiratory- Vents & Circuits	TIER 2: Access	3/1/2024	7/31/2027
Premier	AD-NS-1744	Respiratory Therapy Products: Respiratory Disposables ASCEND	AscenDrive	5/1/2023	8/31/2026
Premier	PP-NS-1744	Respiratory Therapy Products: Respiratory Disposables	TIER 1: Access	5/1/2023	8/31/2026
Premier	PP-NS-1744	Respiratory Therapy Products: Respiratory Disposables	TIER 2: 100K -<200K AND 80%IDN	5/1/2023	8/31/2026
Premier	PP-NS-1744	Respiratory Therapy Products: Respiratory Disposables	TIER 3:>\$200K -<\$400K AND 90% IDN Participation or AHS	5/1/2023	8/31/2026
Premier	PP-NS-1744	Respiratory Therapy Products: Respiratory Disposables	TIER 4: >\$400K AND 90% IDN participation	5/1/2023	8/31/2026
Premier	PP-NS-1744	Respiratory Therapy Products: Respiratory Disposables	TIER 5: Family Tier: ≥\$1m Combined in THREE Contracts AND 90% Respiratory Disposables AND 80% in all other contracts	5/1/2023	8/31/2026
Vizient	MS1089	Respiratory Disposables	Tier 1: Access	6/1/2024	3/31/2027
Vizient	MS1089	Respiratory Disposables	Tier 2 - \$200K Annual spend or 80%	6/1/2024	3/31/2027
Vizient	MS1089	Respiratory Disposables	Tier 3 - \$550K annual spend and 80% or AHS Access	6/1/2024	3/31/2027
Vizient	MS1089	Respiratory Disposables	Tier 4 - \$700K annual spend and 80%	6/1/2024	3/31/2027
Vizient	MS1089	Respiratory Disposables	Tier 5 - \$1.2M combined annual spend with MS1098 and 90%	6/1/2024	3/31/2027
Vizient	10005907	VIZIENT S05 RESP DISP-CAPTIS-10005907	Captis Member	7/1/2022	9/30/2025

HME: Highest Volume SKUs

- 001851 | FILTER BACT F/RESP THERAPY 50/CS
- 003005 | HMEF ADULT W GSP FILTERED 25/CS
- 003003 | HME TYPE I ADULT 50/CS
- 001853 | FILTER HIGH-EFFICENCY RESP 50/CS
- 157 | BALLARD 1000 HEAT MOIST EXCH,25
- 153 | BALLARD 1500 HEAT MOIST EXCH,50
- 003021 | HMEF BYPASS FILTERED 25/CS



Bronchial Hygiene

INTERNAL USE ONLY

Product Overview



INTERNAL USE ONLY

Competitors



Market Dynamics Overview

Total Market Size: Source – Insight ACE analytics

- **CAGR - 9.0%**
- **Total Addressable Market**
 - **OPEP** \$55 Million
 - **Incentive Spirometers** \$18 Million
- **Market Leaders**
 - **Monaghan (OPEP)** 45%
 - **ICU Medical (OPEP)** 30%
 - **AirLife (IS)** 73%
 - **Medline (IS)** 20%

AirLife Market Share:

- **AirLife Market Share**
 - **OPEP therapy – 15% (D R Burton)**
 - **Market leader in Incentive Spirometers - 73%**

Head Winds:

- **Contract negotiations/lack of exclusivity (D R Burton)**
 - **FY26 potential increase in cost**
- **Incentive Spirometers:**
 - **Made in China**
 - **Declining usage (studies show ineffective therapy)**
 - **Supply chain issues pushed customers to competition**

Tail Winds:

- **OPEP**
 - **In process of identifying new device that does not infringe on Trudell IP**
 - **D R Burton economics allow for a lower ASP compared to competitors**
 - **Secured current cost with D R Burton through 2025**
 - **Conversations with RC Cornet**
- **Incentive Spirometers**
 - **Market leader, trusted brand**

PEP Devices

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife (vPEP)	USA	Medium	All Major	
Monaghan (Aerobika)	Canada	Medium	All Major	
ICU Medical (Acapella)		Medium	All Major	
Curaplex (VibraPEP)		Medium	Most Major	

Incentive Spirometers

Competitor	Manufacturing Location	Price Sensitivity	GPO Position(s)	Expectation
AirLife	China	Medium	All Major	Increase
Medline (Telexflex) – Voldyne	Mexico	Medium	All Major	No Increase
Medline (Hudson) – TriFlo II	Mexico	Medium	All Major	No Increase
Portex (Smiths) – Coach 2	USA (Adult) India (Pediatric)	Medium	Most Major	No Increase

Bronchial Hygiene: Contracts

Neal Harpstrite	75834	National	Respiratory - Airway Clearance	7/31/2025	Multi	vPep Devices
Kellie Vande Woude	AD-NS-1744	AscenDrive	AscenDrive Respiratory Therapy Products: Respiratory Disposables	8/31/2026	Dual	All 1740 and 1744 contracted products
Kellie Vande Woude	AD-NS-1755	AscenDrive	AscenDrive Respiratory Therapy Products: Medication Delivery and Bronchial Hygiene	8/31/2026	Dual	All 1752 and 1755 contracted products
John Bowen	SP020095H5055	DAPA	Respiratory/Airway Disposables	12/31/2025	Multi	Westmed branded. Limited items: Nebs, Comfort Soft Plus, Anesthesia Circuits

Bronchial Hygiene: Highest Volume SKUs

- 510 | VPEP OSCILLATING POS PRESSURE DEVICE
- 512 | VPEP OSCILLATING POS PRESSURE DEVICE-HC
- 530V | POCKETPEP OPEP DEVICE 10-PACK CASE



Intubation Aids

INTERNAL USE ONLY

Intubation Aids

\$5.2M Revenue, \$3.8M GP, 73%GP

	Bougie		Stylet			Lighted Stylet		Head Positioner
Product	Straight, Coude, To-Go	PVC Sheathed	SunGlide	Aluminum	Other	SunMed Lighted	LiteWand*	Head Positioner
Brand	SunMed	SunMed, Parker, Vyair	SunMed	SunMed	SunMed	SunMed	Vyair	Vyair
Picture								
2023 US Revenue	\$3,438,487	\$418,753	\$10,791	\$137,572	\$1,827	\$5,152	\$127,272	\$222,031
US Standard Margin	\$2,765,806	\$266,914	\$6,350	\$69,992	\$1,742	\$2,837	\$103,758	\$116,833
US SM%	77%	68%	59%	66%	92%	55%	109%	53%
2023 INT Revenue	\$275,353	\$159,691	\$379	\$10,118	-	-	\$19,634	\$421,022
INT Standard Margin	\$202,835	\$80,300	\$197	\$4,773	-	-	\$15,469	\$196,595
INT SM%	76%	45%	52%	54%	-	-	74%	45%

Market Dynamics Overview

Total Market Size:

- **Total Addressable Market*** - \$90.1M
 - **Domestic*** - \$22.9M
 - **International*** - \$67.2M
- **Market Leaders (domestic)**
 1. **Medtronic** - \$11.6M and 51%
 2. **Teleflex** - \$5.2M and 23%
 3. **AirLife** - \$4.4M and 19%

AirLife Market Share:

- **AirLife Market Share** - \$5.2M and 14%
 - **Domestic** - \$4.4M and 19%
 - **International (if applicable)** - \$886K and 1.3%

Head Winds:

- **3rd party international supplier**
- **Backorders due to labeling updates in 2023**

Tail Winds:

Competitive Landscape Example



	AirLife	Medtronic	Teleflex	Cardinal Health	Cook Medical
Stylet	<p>SunSlip Stylet Malleable aluminum PVC coated 6, 10, 14 Fr</p>	<p>Shiley Intubating Stylet Malleable aluminum PVC coated 6, 10, 14 Fr</p> <p>Extended sheath</p>	<p>RUSCH® FLEXI-SLIP™ STYLET Malleable aluminum, PVC coated 10, 12, 14 Fr</p>	<p>Malleable aluminum, PVC coated 6, 10, 12, 12 Fr</p>	-
Introducer	<p>Blue bougie Straight, Coude, Pediatric</p>				<p>Frova Intubating Introducer Vented tube exchanger</p> <p>Anitree Intubation Catheter for SGA to ETT exchange (G57626)</p> <p>Cook Airway Exchange Catheter (vented)</p>



Thank You!

INTERNAL USE ONLY