

Freedonia Focus Reports  
US Collection



# Disposable Medical Supplies: United States

January 2019



**BROCHURE**  
CLICK TO ORDER  
FULL REPORT

[www.freedoniafocusreports.com](http://www.freedoniafocusreports.com)

# Table of Contents

---

<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>4</b>
Historical Trends	4
Key Economic Indicators	6
Regulation	7
North American Regional Overview	9
<b>3. Segmentation &amp; Forecasts</b>	<b>11</b>
Products	11
Surgical Instruments & Supplies	13
Infusion & Hypodermic Devices	14
Diagnostic & Laboratory Disposables	14
Bandages & Wound Dressings	15
Nonwoven Medical Disposables	16
Respiratory Devices	16
Sterilization Supplies	17
Incontinence Goods	17
Medical & Laboratory Gloves	18
Dialysis Disposables	18
Other Products	19
<b>4. Industry Structure</b>	<b>21</b>
Industry Characteristics	21
Market Leaders	22
Becton Dickinson	23
Cardinal Health	23
Johnson & Johnson	24
<b>5. About This Report</b>	<b>25</b>
Scope	25
Sources	25
Industry Codes	26
Freedonia Methodology	26
Resources	28

# List of Tables & Figures

---

Figure 1   Key Trends in the US Disposable Medical Supplies Market, 2017 – 2022	3
Figure 2   US Disposable Medical Supplies Demand Trends, 2007 – 2017	5
Table 1   Key Indicators for US Disposable Medical Supplies Demand, 2007 – 2022	6
Figure 3   North America Disposable Medical Supplies Demand by Country, 2017 (%)	9
Figure 4   US Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	11
Table 2   US Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	12
Figure 5   US Disposable Medical Supplies Demand by Product, 2007 – 2022 (%)	19
Table 3   Leading Suppliers to the US Disposable Medical Supplies Market by Product	22
Table 4   NAICS & SIC Codes Related to Disposable Medical Supplies	26

# About This Report

---

## Scope

This report forecasts to 2022 US disposable medical supplies demand in nominal US dollars. Total demand is segmented by product in terms of:

- surgical instruments and supplies
- infusion and hypodermic devices
- diagnostic and laboratory disposables
- bandages and wound dressings
- nonwoven medical disposables
- respiratory devices
- sterilization supplies
- incontinence goods
- medical and laboratory gloves
- dialysis disposables
- other products such as patient room supplies, urinary catheters and accessories, and ostomy products

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; the various segments are reported at five-year intervals for 2007, 2012, and 2017.

For the purposes of this report, disposable medical supplies demand is defined as the value of finished products sold by producers at the wholesale level.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Disposable Medical Supplies: United States* (FF40019) is based on [Global Disposable Medical Supplies](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications

## About This Report

- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 4 | NAICS & SIC Codes Related to Disposable Medical Supplies

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
313230	Nonwoven Fabric Mills	2297	Nonwoven Fabrics
339112	Surgical and Medical Instrument Mfg	3841	Surgical and Medical Instruments and Apparatus
339113	Surgical Appliance and Supplies Mfg	3842	Orthopedic, Prosthetic, and Surgical Appliances and Supplies
339114	Dental Equipment and Supplies Mfg	3843	Dental Equipment and Supplies

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product

## About This Report

lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

## Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

## Resources

### The Freedonia Group

*Global Disposable Medical Supplies*

### Freedonia Industry Studies

*Drug Delivery Products*

*Elder Care Services Market in the US*

*Global Nonwovens*

*Global Pharmaceutical Packaging*

*Infection Prevention Products & Services*

*Pouches*

*Silicones Market in the US*

*Wipes Market in the US*

### Freedonia Focus Reports

*Global Electronic Medical Records*

*Healthcare Insurance: United States*

*Healthcare: United States*

*Home Healthcare: United States*

*Medical Services: United States*

*Nonwovens: United States*

*Pet Oral Care: United States*

*Pharmaceutical Packaging: United States*

*Pharmaceuticals: United States*

*Wound Management Products: United States*

### Freedonia Custom Research

### Trade Publications

*Drug Development & Delivery*

*Infection Control Today*

*Medical Design Technology*

*Medical Device & Diagnostic Industry*

*Nonwovens Industry*

### Agencies & Associations

Advanced Medical Technology Association

American Hospital Association

American Medical Association

Association for the Advancement of Medical Instrumentation

Association of the Nonwoven Fabrics Industry

## About This Report

Medical Device Manufacturers Association  
Occupational Safety and Health Administration  
Plastics Industry Association  
United States Census Bureau  
United States Department of Commerce  
United States Department of Health and Human Services  
United States International Trade Commission