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Freedonia Focus Reports
Global Collection

Global Disposable Medical Supplies

January 2019

Table of Contents

List of Tables & Figures

About This Report

Scope

This report forecasts to 2022 global demand for disposable medical supplies by product, market, and major world region in nominal US dollars at the wholesale level. Product segments include:

- surgical instruments and supplies
- infusion and hypodermic devices
- diagnostic and laboratory disposables
- bandages and wound dressings
- nonwoven medical disposables
- other products such as respiratory devices, sterilization supplies, and incontinence goods

Reported markets encompass:

- hospitals
- outpatient facilities
- home healthcare
- other markets such as skilled nursing homes, dental practices, and coroners and law enforcement agencies

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, product, market, and regional demand (including product segments) are provided for 2007, 2012, and 2017. Finally, global shipments segmented by major world region are provided for 2007, 2012, 2017, and 2022.

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.

For any given historical year, US dollar amounts are obtained from values expressed in applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2017.

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

Global Disposable Medical Supplies (FW40019) is based on 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
- 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 10 | 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

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 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.

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Resources

The Freedonia Group

Global Disposable Medical Supplies

Freedonia Industry Studies

Drug Delivery Products
Elder Care Services 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
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
China Association for Medical Devices Industry

European Forum of Medical Associations
European Medical Association
International Monetary Fund
Japan Medical Devices Manufacturers Association
Medical Device Manufacturers Association
Organisation for Economic Co-operation and Development
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
World Bank
World Health Organization