

Freedonia Focus Reports
Global Collection



Global Disposable Medical Supplies

January 2019



CLICK TO ORDER
FULL REPORT

BROCHURE

CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Global Overview & Forecasts	5
Demand by Product	5
Surgical Instruments & Supplies	6
Infusion & Hypodermic Devices	6
Diagnostic & Laboratory Disposables	7
Bandages & Wound Dressings	8
Nonwoven Medical Disposables	8
Other Products	8
Demand by Market	10
Hospitals	11
Outpatient Facilities	11
Home Healthcare	12
Other Markets	12
3. Regional Segmentation & Forecasts	14
Regional Shipments Overview	14
Regional Demand Overview	16
North America	18
Western Europe	20
Asia/Pacific	22
Other Regions	24
Central & South America	25
Eastern Europe	25
Africa/Mideast	25
4. Industry Structure	27
Industry Characteristics	27
Market Share	28
Johnson & Johnson	29
Becton, Dickinson and Company	30
Baxter International	30
5. About This Report	31
Scope	31
Sources	32
Industry Codes	32
Freedonia Methodology	32
Resources	34

List of Tables & Figures

Figure 1 Global Disposable Medical Supplies Market Outlook, 2017 – 2022	4
Figure 2 Global Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	5
Table 1 Global Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	5
Figure 3 Global Disposable Medical Supplies Demand by Product, 2007 – 2022 (%)	9
Figure 4 Global Disposable Medical Supplies Demand by Market, 2007 – 2022 (US\$ mil)	10
Table 2 Global Disposable Medical Supplies Demand by Market, 2007 – 2022 (US\$ mil)	10
Figure 5 Global Disposable Medical Supplies Demand by Market, 2007 – 2022 (%)	13
Figure 6 Global Disposable Medical Supplies Shipments by Region, 2007 – 2022 (US\$ mil)	14
Table 3 Global Disposable Medical Supplies Shipments by Region, 2007 – 2022 (US\$ mil)	14
Figure 7 Global Disposable Medical Supplies Shipments by Region, 2007 – 2022 (%)	15
Figure 8 Global Disposable Medical Supplies Demand by Region, 2007 – 2022 (US\$ mil)	16
Table 4 Global Disposable Medical Supplies Demand by Region, 2007 – 2022 (US\$ mil)	16
Figure 9 Global Disposable Medical Supplies Demand by Region, 2007 – 2022 (%)	17
Figure 10 North America: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	18
Table 5 North America: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	19
Figure 11 Western Europe: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	20
Table 6 Western Europe: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	21
Figure 12 Asia/Pacific: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	22
Table 7 Asia/Pacific: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	23
Figure 13 Other Regions: Disposable Medical Supplies Demand by Region, 2007 – 2022 (US\$ mil)	24
Figure 14 Other Regions: Disposable Medical Supplies Demand by Product, 2007 – 2022 (US\$ mil)	24
Table 8 Other Regions: Disposable Medical Supplies Demand by Region & Product, 2007 – 2022 (US\$ mil)	26
Figure 15 Global Disposable Medical Supplies Market Share by Company, 2017 (%)	28
Table 9 Leading Suppliers to the Global Disposable Medical Supplies Market	29
Table 10 NAICS & SIC Codes Related to Disposable Medical Supplies	32

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.

About This Report

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.

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 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

About This Report

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