

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table & Chart 5](#)

[Sample Profile, Table & Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom Research, Related Studies, Corporate Use License 8](#)

Disposable Medical Supplies

US Industry Study with Forecasts for **2011 & 2016**

Study #2196 | May 2007 | \$4500 | 431 pages

www.freedoniagroup.com



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Economic Factors	5
Population & Demographic Trends	7
Health Care Trends	9
Medical Conditions	11
Health Insurance Trends	16
National Health Expenditures	19
Medical Providers	23
Patient Activity	28
Medical Product Demand	34
Pharmaceuticals & Biologicals	36
Surgical Appliances & Supplies	36
Surgical & Medical Instruments	37
Electromedical Equipment	38
In Vitro Diagnostic Products	38
Analytical Instruments	38
Dental Supplies & Equipment	39
Ophthalmic Goods	39
Lab Apparatus & Furniture	40

RAW MATERIALS

General	41
Plastic Resins	44
Chemicals & Biochemicals	55
Nonwoven Fabrics	56
Paper & Paperboard	58
Rubber Materials	58
Other Raw Materials	59

PRODUCT OVERVIEW

General	60
Product Groups	61
Regulatory Considerations	63
Reprocessing Issues	65
Nosocomial Infections	67
Demand Patterns	67
US Trade	69
International Markets	71

DRUG DELIVERY, CATHETERIZATION & RELATED PRODUCTS

General	76
Inhalation & Anesthesia Disposables	78
Prefilled Inhalers	79
Oxygen Therapy Supplies	88
Anesthesia Disposables	89
Nebulizers	91
Humidifiers	93
Other Inhalation Disposables	94
Hypodermic Products	95
Prefilled Syringes	96
Hypodermic Syringes	103
Hypodermic Needles	105
Catheters & Accessories	107
Cardiovascular Catheters	108
Angioplasty Catheters	109
Angiography Catheters	112
Atherectomy Catheters	113
Other Cardiovascular Catheters	115
Infusion Catheters	117
Urinary Catheters	119
Suction Catheters	121
Other Catheters & Accessories	124
Infusion Products	126
Premixed IV Solutions	127
IV Administration Sets	130

IV Accessories	133
Enteral Feeding Supplies	134
Transdermal Patches	136
Transdermal Technologies	138
Central Nervous System Agents	140
Hormones & Related Agents	141
Cardiovascular Agents	144
Nicotine Patches	144
Other Transdermal Patches	145
Dialysis Disposables	145
Peritoneal Dialysis Products	147
Hemodialysis Products	149

WOUND MANAGEMENT SUPPLIES

General	152
Wound Closures	154
Staples & Stapling Devices	155
Sutures	158
Other Wound Closures	161
Tissue Sealants & Adhesives	162
Hemostats	165
Bandages	167
Adhesive Bandages	168
Adhesive Tapes	172
Cast Bandages & Materials	173
Elastic Bandages	175
Gauze Bandages	176
Pads & Compresses	178
Other Disposable Bandages	179
Wound Dressings	181
Biological & Synthetic Dressings	182
Film Dressings	183
Hydrocolloids	184
Collagen Dressings	185
Foam Dressings	186
Growth Factors	187
Hydrogels	188
Alginates	189
Other Biological & Synthetic Dressings	190
Non-Adherent Dressings	191
Gauze Dressings	192
Other Non-Adherent Dressings	193
Other Wound Management Supplies	194
Medical Sponges	195
Cotton Products	196

NONWOVEN MEDICAL DISPOSABLES

General	198
Disposable Medical Textiles	200
Medical Gowns	201
Surgical Drapes	205
Face Masks	210
Other Disposable Nonwoven Medical Textiles	211
Incontinence Products	217
Adult Diapers	219
Adult Shields	220
Underpads	222
Other Incontinence Disposables	223

OTHER DISPOSABLE MEDICAL SUPPLIES

General	225
Diagnostic & Laboratory Disposables	228
Blood Glucose Test Strips	229
Disposable Labware	232
Blood Collection Supplies	234
Disposable Electrodes	236
Physicians' Examination Supplies	238
Thermometers & Probe Covers	240
Other Diagnostic & Laboratory Disposables	242
Diabetes Tests	243

Pregnancy & Ovulation Tests	245
Other Home Tests	245
Lancets & Lancing Devices	246
Contact Lenses	247
2-30 Day Lenses	249
Daily Lenses	250
Surgical Disposables	252
Procedural Kits & Trays	253
Disposable Surgical Instruments	259
Plastic Surgical Drapes	261
Disinfectants	262
Hand Sanitizers	264
Surface Disinfectants	267
Surgical Scrubs	273
Patient Preparations	275
Instrument Disinfectants	276
Instrument Cleaners	278
Disposable Gloves	278
Examination Gloves	279
Surgical Gloves	281
Laboratory Gloves	283
Sterilization Supplies	285
Sterile Bags & Pouches	286
Sterilization Wrap	289
Biological & Chemical Indicators	291
All Other Disposable Medical Supplies	293
Patient Room Supplies	295
Dental Supplies	296
Ostomy Supplies	297
First Aid Kits	300
Infectious Waste Disposal Supplies	301
Enema Supplies	305

MARKETS

General	308
Hospitals	310
Home Health Care	315
Outpatient Facilities	316
Physicians' Offices	320
Nursing Homes	322
Dental Offices	324
Other Markets	325

INDUSTRY STRUCTURE

General	328
Market Share	331
Competitive Strategies	332
Mergers & Acquisitions	338
Licensing Agreements	340
Marketing & Distribution	341
Research & Development	343
Manufacturing	344

COMPANY PROFILES

Abbott Laboratories	346
Ahlstrom Corporation	349
Ansell Limited	351
Arrow International Incorporated	353
Bard (CR) Incorporated	356
Baxter International Incorporated	360
Becton, Dickinson and Company	363
Boston Scientific Corporation	367
Braun (B.) Melsungen AG	370
Bristol-Myers Squibb Company	372
Cardinal Health Incorporated	374
Coloplast A/S	377
Covidien Limited	380
GlaxoSmithKline plc	386
Hospira Incorporated	388
Johnson & Johnson	390
Kimberly-Clark Corporation	398
Medline Industries Incorporated	402
Medtronic Incorporated	407
Smith & Nephew plc	411

[Click here to purchase online](#)

List of Tables & Charts

EXECUTIVE SUMMARY

1 Summary Table 3

MARKET ENVIRONMENT

1 Macroeconomic Indicators..... 7
 2 Population by Age Group 9
 3 Chronic Conditions by Type14
 4 Acute Conditions.....16
 5 National Health Expenditures by Type22
 6 Medical Providers24
 7 Acute Care Hospital Activity.....29
 8 Surgical Procedures.....30
 9 Outpatient Activity.....32
 10 Diagnostic Tests34
 11 Medical Product Demand by Type35

RAW MATERIALS

1 Raw Materials Consumed in Disposable Medical Supplies by Type.....43
 Cht Disposable Medical Supplies Raw Materials Consumption by Type, 2006...43
 2 Plastic Resins Consumed in Disposable Medical Supplies by Type.....45

PRODUCT OVERVIEW

1 Disposable Medical Supplies Demand by Product Group62
 Cht Disposable Medical Supplies Demand by Product Group, 200663
 2 Disposable Medical Supplies Demand, 1996-2006.....69
 3 US Trade in Disposable Medical Supplies..71
 4 World Medical Supplies Demand by Region.....75

DRUG DELIVERY, CATHETERIZATION & RELATED PRODUCTS

1 Drug Delivery, Catheterization & Related Product Demand by Type.....77
 Cht Drug Delivery, Catheterization & Related Product Demand by Type, 2006.....78
 2 Inhalation & Anesthesia Disposables Demand.....79
 3 Prefilled Inhaler Demand80
 4 Dry Powder Inhaler Demand81
 5 Metered Dose Inhaler Demand85
 6 Oxygen Therapy Supplies Demand.....89
 7 Anesthesia Disposables Demand.....91
 8 Disposable Nebulizer Demand92
 9 Disposable Humidifier Demand.....94
 10 Other Inhalation Disposables Demand.....95
 11 Hypodermic Product Demand96
 12 Prefilled Syringe Demand97

13 Hypodermic Syringe Demand 105
 14 Hypodermic Needle Demand 107
 15 Catheters & Accessories Demand 108
 16 Cardiovascular Catheter Demand 109
 17 Infusion Catheter Demand 118
 18 Urinary Catheter Demand 121
 19 Suction Catheter Demand..... 123
 20 Other Catheters & Catheter Accessories Demand..... 126
 21 Infusion Product Demand..... 127
 22 Premixed IV Solution Demand..... 130
 23 IV Administration Set Demand..... 133
 24 IV Accessories Demand 134
 25 Enteral Feeding Supplies Demand 136
 26 Transdermal Patch Demand..... 138
 27 Dialysis Disposable Demand 147

WOUND MANAGEMENT SUPPLIES

1 Disposable Wound Management Supplies Demand 153
 Cht Wound Management Supplies Demand by Type, 2006 154
 2 Disposable Wound Closure Demand 155
 3 Disposable Staple & Stapler Demand..... 158
 4 Suture Demand..... 161
 5 Other Disposable Wound Closure Demand..... 162
 6 Disposable Bandage Demand 168
 7 Wound Dressing Demand 182
 8 Biological & Synthetic Dressing Demand 183
 9 Non-Adherent Dressing Demand 192
 10 Other Disposable Wound Management Supplies Demand 195

NONWOVEN MEDICAL DISPOSABLES

1 Nonwoven Medical Disposables Demand..... 199
 Cht Nonwoven Medical Disposables Demand by Type, 2006 199
 2 Disposable Nonwoven Medical Textiles Demand..... 201
 3 Disposable Nonwoven Medical Gown Demand..... 202
 4 Disposable Nonwoven Surgical Drape Demand..... 206
 5 Disposable Nonwoven Face Mask Demand..... 211
 6 Other Disposable Nonwoven Medical Textile Demand..... 212
 7 Incontinence Disposables Demand..... 218

OTHER DISPOSABLE MEDICAL SUPPLIES

1 Other Disposable Medical Supplies Demand..... 227

Cht Other Disposable Medical Supplies Demand by Type, 2006..... 228
 2 Diagnostic & Laboratory Disposables Demand..... 229
 3 Blood Glucose Test Strip Demand 232
 4 Disposable Labware Demand..... 233
 5 Blood Collection Supplies Demand..... 236
 6 Disposable Electrode Demand 238
 7 Disposable Physicians' Examination Supplies Demand 240
 8 Disposable Thermometer & Probe Cover Demand..... 242
 9 Other Diagnostic & Laboratory Disposables Demand..... 243
 10 Disposable Contact Lens Demand 248
 11 Surgical Disposables Demand..... 252
 12 Disposable Procedural Kit & Tray Demand..... 253
 13 Disposable Surgical Instrument Demand..... 260
 14 Disposable Plastic Surgical Drape Demand..... 262
 15 Disinfectant Demand..... 264
 16 Disposable Medical Glove Demand 279
 17 Sterilization Supplies Demand 286
 18 All Other Disposable Medical Supplies Demand..... 294

MARKETS

1 Disposable Medical Supplies Demand by Market 309
 Cht Disposable Medical Supplies Demand by Market, 2006 310
 2 Hospitals - Disposable Medical Supplies Demand 311
 3 Home Health Care - Disposable Medical Supplies Demand 316
 4 Outpatient Facilities - Disposable Medical Supplies Demand 317
 5 Physicians' Offices - Disposable Medical Supplies Demand 321
 6 Nursing Homes - Disposable Medical Supplies Demand 323
 7 Dental Offices - Disposable Medical Supplies Demand 325
 8 Other Markets - Disposable Medical Supplies Demand 327

INDUSTRY STRUCTURE

1 Disposable Medical Supplies (DMS) Sales by Company, 2006..... 329
 Cht Disposable Medical Supplies Market Share by Competitor, 2006..... 334

[Click here to purchase online](#)

Drug delivery, catheterization and related products will remain the largest and fastest growing disposable medical supplies, with demand increasing 5.7 percent annually through 2011.

US demand to grow 4.9% annually through 2011

US demand for disposable medical supplies will increase 4.9 percent annually to more than \$70 billion in 2011. Drug delivery, catheterization and related products will remain the largest and fastest expanding group of disposable medical supplies, with demand increasing 5.7 percent annually to \$35 billion in 2011. Growth will reflect a rising base of chronic care patients who require surgery or continuous therapy. This trend, coupled with the introduction of new higher value-added, safety-enhanced products, will boost growth opportunities for several single-use products, especially prefilled inhalers and syringes, atherectomy and coronary perfusion catheters, transdermal patches and peritoneal dialysis kits.

Dressings, scrubs, test strips among categories with best prospects

Demand for wound management supplies will reach \$8 billion in 2011, up 4.0 percent annually from 2006. Dressings will post the strongest growth as highly absorbent alginate and foam products and fast-healing collagen and growth factor dressings expand applications in the treatment of moderate-to-severe lacerations. Tissue sealants composed of cyanoacrylates



and bioengineered fibrins will fare the best among wound closures based on superior binding traits and fast healing advantages. Demand for bandages will expand at a below-average pace due to limited pricing flexibility and the general lack of proprietary products.

Class IV surgical drapes and gowns will post the strongest sales gains among nonwoven medical textiles as surgical infection prevention safeguards are upgraded by hospitals and ambulatory surgery centers. Disposable face masks will also fare well in the marketplace, benefitting from routine use by medical providers in virtually all direct contact patient procedures. Enhanced absorbent, odor

neutralized diapers and shields will see the fastest gains in demand among incontinence products based on comfort and protection.

Among other disposable medical supplies, blood glucose test strips and home tests kits for other diabetes markers, along with daily contact lenses, first aid kits, biological indicators and laboratory gloves, will command the strongest growth opportunities. An expanding number of diabetics engaging in self-testing will boost demand for blood glucose test strips. New color-tinted, UV-protected and moisture-enhanced brands will expand sales of daily contact lenses. Trends

Sample Text, Table & Chart

OTHER DISPOSABLE MEDICAL SUPPLIES

Dental Supplies

Demand for disposable dental materials and supplies will reach \$5 million in 2011. An increasing aging population, coupled with more visits, will spur gains. Advanced materials will moderate faster growth in demand.

Disposable and consumable dental supplies include repair kits, hand instrument accessories, care swabs, wax and wedges. Adhesives, consisting of special cements, are employed in the setting of cavities and burs is an instrument accessory that rotates at a high speed, enabling the cutting of bone, teeth or previous fillings. Denture repair kits provide porcelain materials and adhesives for the repair of chipped and cracked artificial teeth. Disposable hand instrument accessories include applicator tips for dental cleaners and polishes as well as plaque removal picks. Oral care swabs are used to administer saliva supplements and other moisturizers. Wax is employed in the preparation of dental prosthetics. Finally, wedges hold dentures, crowns and fillings in place while setting.

In addition to specific dental-related supplies, dentists use several types of disposables categorized as medical products, including surgical and examination gloves, face masks, scrubs, syringes and needles, waste disposal containers and x-ray film. The demand for these items is not reflected in the statistics appearing in the above table. Rather, it is included in the data presented for the applicable medical product groups. Moreover, oral care consumables, including dental floss, dental prophylaxis kits, toothbrushes, toothpaste and tooth polishes, are considered personal care goods and outside the scope of this analysis.

Biomet, Danaher, Dentsply International, Nobel Biocare, Sybron Dental Specialties and 3M are among the leading US producers of

296

Copyright 2007 The Freedonia Group, Inc.

TABLE V-12

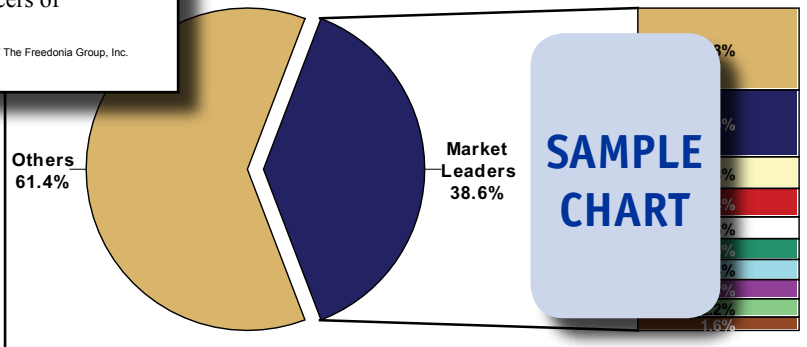
PREFILLED SYRINGE DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Chronic Conditions (million)					
\$ prefilled syringes/condition					
Prefilled Syringes					
Biologicals					
Hormones & Related Agents					
Radiopharmaceuticals					
Central Nervous System Agents					
Cardiovascular Agents					
Other					
% prefilled syringes					
Hypodermic Product Demand	31				300

SAMPLE
TABLE

CHART X-1

DISPOSABLE MEDICAL SUPPLIES
MARKET SHARE BY COMPETITOR, 2006
(\$55.4 billion)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-6
DISPOSABLE BANDAGE DEMAND
 (million dollars)

Item	1996	2001	2006	2011	2016
Resident Population (million)	269.4	285.1	299.1	312.6	326.1
\$ bandages/capita	5.7	6.6	7.6	8.6	9.7
Bandage Demand					160
Adhesive Bandages					40
Adhesive Tapes					40
Cast Bandages & Materials					35
Elastic Bandages					75
Gauze Bandages					95
Pads & Compresses					70
Other					05
% bandages					2.9
Disp Wound Management Supplies					00

**SAMPLE
 PROFILE**

COMPANY PROFILES

Hospira Incorporated

275 North Field Drive

Lake Forest, IL

224-212-1100

http://www.hospira.com

Sales: \$1.1 billion

US Sales: \$800 million

Employment: 10,000

Key Products: Specialty injectable pharmaceuticals, IV and drug delivery systems, administration sets, catheters, and accessories, and disposable pressure transducers

Hospira develops, manufactures and markets specialty injectable pharmaceuticals, IV and drug delivery systems. It also provides contract manufacturing services to pharmaceutical and biotechnology companies. Hospira operates through five main segments: Specialty Injectable Pharmaceuticals, Medication Delivery Systems, Injectable Pharmaceutical Contract Manufacturing, Other and International.

The Company participates in the disposable medical supply industry through the Specialty Injectable Pharmaceuticals, Medication Delivery Systems and Other segments. Among the disposable products marketed and manufactured by the Company are drug delivery systems, intravenous (IV) administration sets, catheters and accessories, and disposable pressure transducers.

Specialty Injectable Pharmaceuticals Segment -- Via this segment, which had 2006 sales of \$808 million, Hospira produces a broad range of generic injectable drugs and drug delivery systems. The segment's products feature bar code technology and easy-to-read labels to reduce the risk of medication errors. These disposable supplies include FIRSTCHOICE premixed magnesium sulfate for cardiovascular, anti-injective and therapeutic drugs; the ADD-VANTAGE system,

**SAMPLE
 TABLE**

Cast Bandages & Materials
 "Projected upward trends in the incidence of orthopedic injuries and impairments will boost demand for cast bandages and materials 3.8 percent annually to \$450 million in 2011. In addition to an expanding incidence of treated conditions, growth will benefit from preferences among health professionals and patients for high value-added, fiberglass and thermoplastic products. Less favorably ..."
 --Section VI, pg. 173

OTHER STUDIES

Infection Prevention Products & Services

US demand for infection prevention products and services will grow 4% annually through 2011, driven by efforts to combat healthcare-acquired infections. Services will outpace supplies and equipment. Among products, surgical drapes and gowns will remain dominant while waste disposal and sterilization supplies will lead gains. This study analyzes the \$13.8 billion US infection prevention industry, with forecasts for 2011 and 2016 by type and market. It also evaluates market share and profiles major players.

#2234 08/2007..... \$4400

Dental Equipment

US demand for dental equipment will grow 3.8% annually through 2011, aided by favorable population trends and strong interest in technology updates. In general, advanced equipment such as lasers, intra-oral cameras, digital radiography and CAD/CAM systems will lead gains. Dental offices will remain the largest market and grow the fastest. This study analyzes the \$2.4 billion US dental equipment industry to 2011 and 2016 by product and market. It also evaluates market share and profiles major players.

#2179 04/2007..... \$4400

In Vitro Diagnostics

US demand for in vitro diagnostic (IVD) products will grow 5.1% annually through 2011. Clinical chemistry and immunoassay methods will remain the top two IVD sciences, while nucleic acid testing products will continue to generate the fastest gains. Hospital labs will stay the largest market while home health care will grow the fastest. This study analyzes the \$15.2 billion US IVD industry to 2011 and 2016 by product, application and market. It also evaluates company market share and profiles major players.

#2175 04/2007..... \$4500

Sterile Medical Packaging

US sterile medical packaging demand will grow 6% annually through 2010. Pharmaceutical and biological uses will lead growth as new injectable and inhalation therapies boost demand for functional containers (e.g., prefilled inhalers/syringes). Pouches will stay the top container for medium- to large-sized devices and supplies. This study analyzes the \$3.3 billion US sterile medical packaging industry to 2010 and 2015 by product, material and application. It also details market share and profiles major players.

#2119 10/2006..... \$4300

Biocompatible Materials

US demand for biocompatible materials will grow 6.6% yearly through 2010. Synthetic polymers will remain dominant based on quality, performance and cost advantages in most applications. Ceramics will grow the fastest, driven by improved properties and processing ease. Hyaluronic acid and collagen will pace the natural polymer segment. This study analyzes the \$2.7 billion US biocompatible industry to 2010 and 2015 by material and application. It also evaluates market share and profiles major players.

#2111 09/2006..... \$4400

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)