



World Wound Management Products

Industry Study with Forecasts for **2013 & 2018**

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China will form the fastest expanding wound management market in the world as strong economic growth enables the country to upgrade and expand its medical delivery system.

Global demand to expand 4.6% yearly through 2013

World demand for wound management products will expand 4.6 percent annually to \$28.8 billion in 2013, serving a \$9.2 trillion global health care industry. The best growth opportunities will emerge in tissue sealants, foam and alginate wound dressings, growth factor healing agents, bioengineered tissue substitutes and negative pressure therapy systems. China will form the fastest expanding wound management market as strong economic growth enables the country to upgrade and expand its medical delivery system. The United States is the largest and most diversified global consumer of wound management supplies and devices, reflecting the advanced nature of professional health care treatment, the widespread health insurance coverage for basic and essential health care services, and physician preferences for high value-added products.

Tissue sealants to pace key wound closure segment

World demand for wound closures will grow 3.5 percent annually through 2013. Advances in minimally invasive surgeries and the increasing substitution of drug therapy for surgical procedures will moderate faster growth. Tissue sealants will provide the fastest growth among wound closures, spurred by improvements in available products and speed of application advantages in the closing of minor surgical incisions and wounds.

North America
37%

Western Europe
30%

Asia/Pacific
21%

Other Regions
12%

World Wound Management Products Demand by Region (\$28.8 billion, 2013)



photo: Avery Dennison

Nonetheless sutures and staples will continue to dominate wound closure demand based on well-established performance results in major surgery.

Dressings, healing agents among best opportunities

Global demand for wound dressings will expand 5.4 percent annually through 2013. Gains will reflect the increasing adoption of more aggressive wound treatment protocols. These protocols will include more frequent dressing changes to prevent infection and the expanding use of highly absorbent foam and gel coverings that promote faster wound healing by debriding necrotic tissue and creating a moist wound bed.

Led by anti-infectives and growth factors, world demand for wound healing agents will increase 6.4 percent annually through 2013. Infection prevention considerations in the management of wounds, surgical incisions and burns will foster the frequent application of anti-infectives, especially triple antibiotic ointments, to affected skin sites. Consumer sales of these preparations will also expand, spurred by trends promoting the self-treatment of minor injuries. Growth factors will build up demand based on skin cell stimulating properties that contribute to the faster healing of wounds.

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**Sample Text,
 Table & Chart**

MARKETS

China: Wound Management Products Demand

Total demand for wound management products in China is projected to increase to \$4 billion in 2013. Improving availability of primary health care facilities will underlie growth. Inpatient and outpatient care rates will rise as hospitals broaden capabilities in surgery and general medicine. Hospitals dominate the delivery of most medical services, serving as the base of facilities and physicians' offices. As a result, residents must travel to the hospital to receive professional health care treatment.

Due to persisting imbalances in the distribution of health resources, China's per capita consumption of wound management products will remain slightly below developing world norms through 2018. Moreover, demand will remain concentrated in commodity-based consumables, supplies and devices as only a small percentage of the population will have access to advanced procedures such as open heart surgery, pressure therapy and bioengineered skin replacements. The reluctance of many individuals to self-treat many injuries will keep a large share of Chinese wound management product sales in basic bandages, dressings and anti-infective wound healing agents. The country's demand for higher value-added products, such as bioengineered growth factors, foam and alginate wound dressings, and vacuum-assisted wound treatment equipment will remain negligible, at least in the near term.

Small- to medium-sized domestic producers of commodity wound closures, bandages, wound dressings and wound healing agents dominate the supply of wound management products in China. Additional suppliers with manufacturing sites in the country include Melsungen, which operates a plant in Suzhou; and Derma Sciences, which maintains a production facility in Nantong. Both of the

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**SAMPLE
 TEXT**

TABLE VI-3

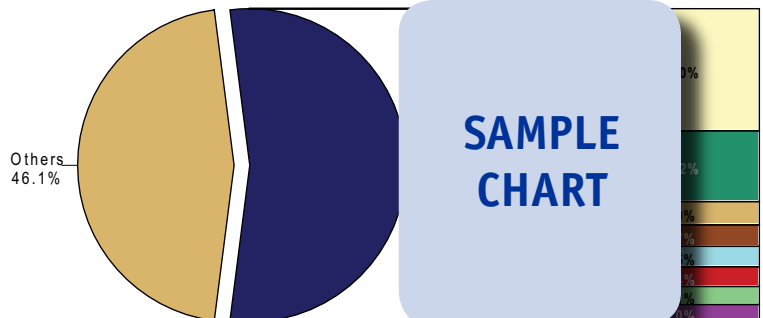
CHINA - WOUND MANAGEMENT INDICATORS

Item	1998	2003	2008	2013	2018
Population (million)	1.2	1.3	1.4	1.5	1.6
% 50 years & older	10	11	12	13	14
Population 50 Years & Older (million):					
50 to 64 Years	1.2	1.3	1.4	1.5	1.6
65 Years & Older	0.8	0.9	1.0	1.1	1.2
per capita GDP	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2007\$)	10,000	15,000	20,000	25,000	30,000
\$ expenditures/capita	100	150	200	250	300
Health Expenditures (bil \$)	100	150	200	250	300
hospital admissions/000 capita	10	11	12	13	14
Hospital Admissions (million)	10	11	12	13	14
surgical procedures/000 capita	10	11	12	13	14
Surgical Procedures (million)	10	11	12	13	14
outpatient consultations/capita	10	11	12	13	14
Outpatient Consultations (million)	10	11	12	13	14

**SAMPLE
 TABLE**

CHART VIII-1

**WORLD WOUND MANAGEMENT PRODUCTS
 MARKET SHARE BY COMPANY
 (\$22.9 billion, 2008)**



**SAMPLE
 CHART**

**Sample Profile,
 Table & Forecast**

TABLE VI-4

**CHINA - WOUND MANAGEMENT PRODUCT DEMAND
 (million dollars)**

Item	1998	2003	2008	2013	2018
Health Expenditures (bil \$)	110	115	120	125	130
\$ products/000\$ expenditures	1.2	1.2	1.2	1.2	1.2
Wound Management Products Demand					30
Wound Closures:					60
Sutures & Accessories					00
Staples & Stapling Devices					85
Tissue Sealants					10
Hemostats/Other Wound Closures					65
Bandages:					25
Adhesive Bandages & Tapes					40
Other Bandages					85
Wound Dressings:					25
Non-Adherent Dressings					60
Other Dressings					65
Wound Healing Agents					90
Other Wound Management Products					30
% China					5.0
Asia/Pacific Wound Management Prods20					720

**SAMPLE
 PROFILE**

COMPANY PROFILES

Cederroth International AB
 Kanalvagen 10A
 19427 Upplands Vasby
 Sweden
 46-8-560-96-470
 http://www.cederroth.com

Sales: \$ (8)
 Geograp Sweden
 Europea
 Employ

Key Pro sings

Cec health care, wound care, hous Europe. The Company is owned by CapMan plc (Finland), an investment firm that acquired Cederroth from Alberto-Culver Company (US), a manufacturer and marketer of beauty and personal care, and household products, in May 2008.

Cederroth participates in the world wound management products industry through the manufacture of adhesive bandages and wound dressings. Adhesive bandages are sold under such brand names as SALVEQUICK. SALVEQUICK products include plastic and fabric varieties. The Company's wound dressings include the CEDERROTH BLOODSTOPPER 4-IN-1, which is a sterile universal dressing designed to function as a pressure pad to stop heavy bleeding, a protective dressing for superficial wounds, a burn dressing or a temporary support dressing. Cederroth conducts manufacturing operations for wound care and other products at a plant in Salun, Sweden.

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**SAMPLE
 TABLE**

"Through 2013, total health expenditures are projected to increase 9.8 percent annually to \$560 billion, or almost \$410 per capita. Beyond growth, outlays for medical products and services will be allocated more efficiently and effectively than in the past."

--Section VI, pg. 195

OTHER STUDIES

Cosmetic Surgery Products

US demand for cosmetic surgery products is expected to advance 7.4% annually through 2014, based on a return to growth in cosmetic procedures. Injectables will remain the largest and fastest growing segment, led by BOTOX COSMETIC, DYSPORT and newer types such as calcium hydroxylapatite. This study analyzes the \$1.8 billion US cosmetic surgery product industry, with forecasts for 2014 and 2019 by procedure, product and raw material. It also evaluates company market share and profiles industry participants.

#2712December 2010 \$4800

World Disposable Medical Supplies

Global demand for disposable medical supplies will increase 5.6% annually through 2014, with developed countries accounting for nearly three-fourths of the market. Wound management supplies will remain the top-selling group while diagnostic and laboratory disposables grow the fastest. This study analyzes the \$125 billion world disposable medical supply industry, with forecasts for 2014 and 2019 by product, world region and for 14 countries. It also evaluates company market share and profiles industry competitors.

#2691December 2010 \$5900

Implantable Medical Devices

US demand for implantable medical devices will increase 8.3% annually through 2014. Gains will be driven by the development of next generation devices based on new technologies and improved materials. Spinal implants, cardiac stents and orthobiologics will be among the fastest growing product categories. This study analyzes the \$33 billion US implantable medical device industry, with forecasts for 2014 and 2019 by procedure, material and type. It also evaluates company market share and profiles 36 industry competitors.

#2595April 2010 \$4800

Nonwovens

Demand for nonwoven roll goods in the US is projected to rise 3.7% annually through 2013. Among disposable nonwovens, consumer items will continue to claim the most sales while the filtration market grows the fastest. Within the nondisposables segment, construction will remain the largest market and grow the fastest. This study analyzes the \$5.2 billion US nonwoven fabric industry, with forecasts for 2013 and 2018 by material, product and market. It also evaluates market share and profiles industry players.

#2559 November 2009 \$4900

World Nonwovens

Global demand for nonwoven fabrics is forecast to rise 6.9% yearly through 2012. Gains in developing parts of Asia/Pacific, Eastern Europe, Africa/Mideast and Latin America will outpace demand in developed countries. Spunmelt nonwovens, the largest segment, will also grow the fastest. This study analyzes the \$21.2 billion world nonwovens industry, with forecasts for 2012 and 2017 by formation process, application, market, world region and for 19 national markets. It also evaluates market share and profiles industry players.

#2482 March 2009 \$5600

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