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Global demand to rise 5.6% yearly through 2014

World demand for disposable medical supplies will increase 5.6 percent annually to $164 billion in 2014. Based on the advanced nature of medical delivery systems and the widespread health insurance coverage of residents for primary health care procedures, the developed countries combined will account for nearly three-fourths of this total. Demand in the developing countries as a whole will expand faster as the availability and accessibility of basic health care services improve. Throughout the world, stepped up efforts to improve infection prevention protocols will benefit demand for disposable medical supplies. However, most products will become increasingly price sensitive due to the expansion of health care cost containment initiatives.

Wound disposables to remain top-selling group

Based on uses in surgery, first aid and trauma treatment, wound management supplies will remain the top-selling group of disposable medical supplies worldwide. Global demand for these products is forecast to increase 4.7 percent annually to $30 billion in 2014. Wound dressings based on alginate, foam, collagen and growth factor substances will post the most rapid growth based on use in treating moderate-to-severe lacerations. Cyanoacrylates and bioengineered fibrin tissue sealants will also fare well in the marketplace 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 lack of proprietary products. Trends toward less invasive surgery will weaken the overall market for wound closures.

World demand for nonwoven medical disposables will increase 4.4 percent annually to $25.1 billion in 2014. The strengthening of health care infection prevention standards will drive growth by promoting the substitution of higher value-added single-use textiles and garments for lower cost products during surgery and general patient care. Additionally, a rising prevalence of incontinence conditions will boost sales of adult diapers and related goods.

Diagnostic and laboratory disposables are projected to post global demand of nearly $22.4 billion in 2014, up 7.1 percent annually from 2009. Blood glucose test strips and other diabetes-related testing supplies will see the fastest gains as recommendations of medical organizations throughout the world encourage diabetic patients to broaden self-testing activities. Other diagnostic and laboratory disposables will provide mixed growth opportunities. Products for the self-testing and professional diagnosis of widely prevalent chronic conditions will fare the best in the marketplace.
Asia/Pacific

China -- Demand for Disposable Medical Supplies

Total demand for disposable medical supplies in China is projected to increase to $10.9 billion in 2014, growing at a compound annual growth rate of 11.5% from 2009 to 2014. Improving availability of inpatient and ambulatory health care services will underlie gains. The rising availability of inpatient consultation and other medical services will rise as the number of doctors and general practitioners per 1,000 population rises and as hospitals become more capable. The growth in hospital beds will also underlie gains as hospitals will become the preferred provider for most medical services in the country. Hospitals dominate the delivery of most medical services in China, serving as the base of operations for most doctors. The absence of an integrated network of outpatients' facilities and physicians’ offices. As a result, residents must go to the hospital to receive professional health care treatment.

Due to persisting imbalances in the distribution of health care resources, China’s per capita consumption of disposable medical supplies will remain slightly below developing world norms through 2014. Moreover, demand will remain concentrated in commodity-based consumables, supplies and devices as only a small percentage of residents have access to advanced surgical and outpatient procedures. China’s high percentage of self-treatment will keep a large share of China’s disposable medical product sales in basic bandages, dressings and other first aid supplies. The country’s demand for higher value-added products, such as bioengineered growth factors, foam and alginate wound dressings, prefilled syringes and inhalers, and micro-catheters will remain negligible, at least in the near term.

Small- to medium-sized domestic producers of commodity-based supplies and devices dominate the supply of disposable medical supplies in China. Multinational suppliers with manufacturing sites in China include Ahlstrom, which produces nonwoven medical disposables at a site in Wuxi; B. Braun Melsungen, which operates a plant in Suzhou; and Derma Sciences, which maintains a production facility in Nantong. Both of these firms utilize their Chinese sites to produce conventional, commodity products.

<table>
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“China will continue to experience rapid growth in health care spending over the long term as the population ages and government reforms improve the availability and accessibility of basic and essential medical treatment. Through 2014, total health expenditures are projected to increase over 15 percent annually to $443 billion, or over $320 per capita. Beyond growth, outlays for medical products and services will be allocated more efficiently and effectively than in the past.”

--Section VI, pg. 294-5
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