

[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 & Corporate
Use License 7](#)

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



World Disposable Medical Supplies

Industry Study with Forecasts for **2014 & 2019**

Study #2691 | December 2010 | \$5900 | 525 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	6
Recent Historical Trends	6
World Economic Outlook	8
World Demographic Patterns	12
Total Population	13
Age Distribution	14
World Health Care Trends	16
World Health Expenditures	18
Hospital Beds	22
Physicians	24
Patient Activity	26
Hospital Admissions	27
Surgical Procedures	28
Outpatient Consultations	30
Regulatory Considerations	32

PRODUCT OVERVIEW

General	34
Demand by Region	35
Shipments by Region	38
World Trade	40
Raw Materials Demand	41
Plastic Resins	43
Nonwoven Fabrics	49
Elastomers & Rubber	51
Paper & Paperboard	52
Other Raw Materials	52
Demand by Type	53
Wound Management Supplies	56
Demand by Type	59
Wound Closures	61
Disposable Bandages	73
Wound Dressings	83
Other Wound Management Products	92
Nonwoven Medical Disposables	98
Demand by Type	100
Surgical & Patient Gowns	101
Surgical Drapes	103
Incontinence Disposables	105
Face Masks	110
Other Nonwoven Medical Disposables	112
Diagnostic & Laboratory Disposables	115
Demand by Type	117
Diabetes Testing Supplies	118
Disposable Labware	122
Blood Collection Supplies	123
Other Diagnostic & Laboratory Disposables	125
Drug Delivery Devices	132
Demand by Type	134
Hypodermic Products	135
Infusion Products	143
Other Drug Delivery Devices	147
Catheters & Accessories	156
Demand by Type	157
Cardiovascular Catheters	159

IV Catheters	163
Urinary Catheters	165
Other Catheters & Catheter Accessories	167
Surgical Disposables	169
Demand by Type	171
Procedural Kits	172
Surgical Instruments	176
Plastic Drapes	177
Sterilization Supplies	178
Demand by Type	180
Sterilization Containers	182
Sterilization Wrap	187
Biological & Chemical Indicators	189
Medical Gloves	192
Demand by Type	193
Examination Gloves	195
Surgical Gloves	197
Laboratory Gloves	201
Other Medical Disposables	202
Demand by Type	204
Inhalation Therapy Supplies	205
Dialysis Disposables	207
Patient Room Supplies	212
Ostomy Supplies	212
Anesthesia Disposables	214
All Other Medical Disposables	215

NORTH AMERICA

North America: Market Environment	221
North America: Demand for Disposable Medical Supplies	223
United States	225
Canada	230
Mexico	236

WESTERN EUROPE

Western Europe: Market Environment	241
Western Europe: Demand for Disposable Medical Supplies	244
France	245
Germany	250
Italy	255
Spain	260
United Kingdom	265
Other Western Europe	271

ASIA/PACIFIC

Asia/Pacific: Market Environment	280
Asia/Pacific: Demand for Disposable Medical Supplies	283
Australia	285
China	292
India	298
Japan	305
Other Asia/Pacific	310

OTHER REGIONS

Central & South America	318
-------------------------	-----

Central & South America: Market Environment	318
Central & South America: Demand for Disposable Medical Supplies	321
Brazil	324
Other Central & South America	329
Eastern Europe	336
Eastern Europe: Market Environment	336
Eastern Europe: Demand for Disposable Medical Supplies	339
Russia	341
Other Eastern Europe	346
Africa/Mideast	351
Africa/Mideast: Market Environment	351
Africa/Mideast: Demand for Disposable Medical Supplies	354

INDUSTRY STRUCTURE

General	358
Market Share	361
Competitive Strategies	363
Mergers & Acquisitions	369
Licensing & Related Agreements	373
Product Development	376
Marketing & Distribution	377
Manufacturing	379

COMPANY PROFILES

Abbott Laboratories	381
Advanced Medical Solutions	386
Ahlstrom Corporation	388
Ansell Limited	391
Aso LLC	394
Attends Healthcare Products	396
Bard (CR) Incorporated	398
Baxter International	404
Becton, Dickinson	408
Boston Scientific	414
Braun (B.) Melsungen	419
BSN medical	425
CareFusion Corporation	427
Cederroth AB	431
Coloplast A/S	433
ConvaTec Incorporated	436
Covidien plc	441
Derma Sciences	450
Hospira Incorporated	453
Johnson & Johnson	457
Kimberly-Clark	467
Lohmann & Rauscher	473
Medline Industries	477
Medtronic Incorporated	483
Mölnlycke Health Care	488
SCHOTT AG	493
Semperit AG	495
Smith & Nephew	498
Smiths Group	502
Svenska Cellulosa	506
Systagenix Wound Management	509
Teleflex Incorporated	512
Terumo Corporation	517
3M Company	521

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table..... 3

MARKET ENVIRONMENT

1 World Macroeconomic Indicators..... 5
 2 World Gross Domestic Product by Region .. 12
 3 Total World Population by Region 14
 4 World Population 65 Years
 & Older by Region..... 16
 5 World Health Care Indicators..... 17
 6 World Health Expenditures by Region 21
 Cht World Health Expenditures
 by Region, 2009 22
 7 Number of Hospital Beds by Region..... 24
 8 Number of Physicians by Region 26
 9 Number of Hospital Admissions by Region 28
 10 Number of Surgical Procedures by Region .30
 11 Number of Outpatient Consultations
 by Region 32

PRODUCT OVERVIEW

1 World Demand for Disposable
 Medical Supplies by Region 37
 Cht World Demand for Disposable Medical
 Supplies by Region, 2009 38
 2 World Shipments of Disposable
 Medical Supplies by Region 39
 3 World Net Exports of Disposable
 Medical Supplies by Region 41
 4 World Raw Materials Demand in Disposable
 Medical Supplies by Type & Region 43
 5 World Demand for Disposable
 Medical Supplies by Type..... 55
 Cht World Demand for Disposable Medical
 Supplies by Type, 2009 56
 6 World Demand for Disposable Wound
 Management Supplies by Region..... 59
 7 World Demand for Disposable Wound
 Management Supplies by Type..... 61
 8 World Nonwoven Medical Disposables
 Demand by Region 99
 9 World Nonwoven Medical Disposables
 Demand by Type 100
 10 World Diagnostic & Laboratory
 Disposables Demand by Region 117
 11 World Diagnostic & Laboratory
 Disposables Demand by Type 118
 12 World Disposable Drug Delivery
 Devices Demand by Region 133
 13 World Disposable Drug Delivery
 Devices Demand by Type 135
 14 World Disposable Catheters & Accessories
 Demand by Region 157
 15 World Disposable Catheters & Accessories
 Demand by Type 158
 16 World Surgical Disposables
 Demand by Region 170
 17 World Surgical Disposables
 Demand by Type 171

18 World Demand for Disposable Sterilization
 Supplies by Region..... 180
 19 World Demand for Disposable Sterilization
 Supplies by Type 182
 20 World Demand for Disposable
 Medical Gloves by Region 193
 21 World Demand for Disposable
 Medical Gloves by Type 195
 22 World Demand for Other Disposable
 Medical Supplies by Region 203
 23 World Demand for Other Disposable
 Medical Supplies by Type..... 204

NORTH AMERICA

1 North America -- Health Care Indicators. 223
 2 North America -- Demand for Disposable
 Medical Supplies by Type..... 225
 3 United States -- Health Care Indicators.. 228
 4 United States -- Demand for Disposable
 Medical Supplies by Type..... 230
 5 Canada -- Health Care Indicators 233
 6 Canada -- Demand for Disposable
 Medical Supplies by Type..... 235
 7 Mexico -- Health Care Indicators..... 238
 8 Mexico -- Demand for Disposable
 Medical Supplies by Type..... 240

WESTERN EUROPE

1 Western Europe -- Health Care Indicators 243
 2 Western Europe -- Demand for
 Disposable Medical Supplies by Type .. 245
 3 France -- Health Care Indicators 248
 4 France -- Demand for Disposable
 Medical Supplies by Type..... 250
 5 Germany -- Health Care Indicators 253
 6 Germany -- Demand for Disposable
 Medical Supplies by Type..... 255
 7 Italy -- Health Care Indicators..... 258
 8 Italy -- Demand for Disposable
 Medical Supplies by Type..... 260
 9 Spain -- Health Care Indicators 263
 10 Spain -- Demand for Disposable
 Medical Supplies by Type..... 265
 11 United Kingdom -- Health
 Care Indicators..... 269
 12 United Kingdom -- Demand for Disposable
 Medical Supplies by Type..... 271
 13 Other Western Europe -- Health
 Care Indicators..... 274
 14 Other Western Europe -- Demand for
 Disposable Medical Supplies by Type .. 278
 15 Other Western Europe -- Demand for
 Disposable Medical Supplies
 by Country..... 279

ASIA/PACIFIC

1 Asia Pacific -- Health Care Indicators..... 283
 2 Asia/Pacific -- Demand for Disposable
 Medical Supplies by Type..... 285

3 Australia -- Health Care Indicators 289
 4 Australia -- Demand for Disposable
 Medical Supplies by Type..... 292
 5 China -- Health Care Indicators 295
 6 China -- Demand for Disposable
 Medical Supplies by Type..... 298
 7 India -- Health Care Indicators 302
 8 India -- Demand for Disposable
 Medical Supplies by Type..... 305
 9 Japan -- Health Care Indicators 308
 10 Japan -- Demand for Disposable
 Medical Supplies by Type..... 310
 11 Other Asia/Pacific -- Health
 Care Indicators 313
 12 Other Asia/Pacific -- Demand for
 Disposable Medical Supplies by Type .. 316
 13 Other Asia/Pacific -- Demand for
 Disposable Medical Supplies
 by Country..... 317

OTHER REGIONS

1 Central & South America -- Health
 Care Indicators 321
 2 Central & South America -- Demand for
 Disposable Medical Supplies by Type .. 324
 3 Brazil -- Health Care Indicators 327
 4 Brazil -- Demand for Disposable
 Medical Supplies by Type..... 329
 5 Other Central & South America --
 Health Care Indicators 333
 6 Other Central & South America -- Demand
 for Disposable Medical Supplies
 by Type 335
 7 Other Central & South America -- Demand
 for Disposable Medical Supplies
 by Country..... 336
 8 Eastern Europe -- Health Care Indicators 339
 9 Eastern Europe -- Demand for Disposable
 Medical Supplies by Type..... 341
 10 Russia -- Health Care Indicators 344
 11 Russia -- Demand for Disposable
 Medical Supplies by Type..... 346
 12 Other Eastern Europe -- Health
 Care Indicators..... 348
 13 Other Eastern Europe -- Demand for
 Disposable Medical Supplies by Type .. 350
 14 Other Eastern Europe -- Demand for
 Disposable Medical Supplies
 by Country..... 351
 15 Africa/Mideast -- Health Care Indicators 354
 16 Africa/Mideast -- Demand for Disposable
 Medical Supplies by Type..... 356
 17 Africa/Mideast -- Demand for Disposable
 Medical Supplies by Country 357

INDUSTRY STRUCTURE

1 World Sales of Disposable Medical
 Supplies by Company, 2009 360
 Cht World Disposable Medical Supplies
 Market Share by Company, 2009 363
 2 Selected Acquisitions & Divestitures..... 371
 3 Selected Cooperative Agreements..... 374

[Click here to purchase online](#)

Based on the advanced nature of medical delivery systems and widespread health insurance coverage, developed countries will account for nearly three-fourths of demand in 2014.

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 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

World Demand for Disposable Medical Supplies, 2014 (\$164 billion)



North America
36%

Western Europe
29%

Asia/Pacific
23%

Other Regions
12%

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.

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text,
 Table & Chart

ASIA/PACIFIC

China -- Demand for Disposable Medical Supplies

Total demand for disposable medical supplies in China is expected to increase to 21 billion in 2014 from 19 billion in 2009. Improving availability of primary health care services and underlying gaps in patient consultation capabilities will rise as a result of enhanced capabilities and general availability of services. Small- to medium-sized domestic producers dominate the demand base of operations. The country's base of operations is a well-developed network of outpatient 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 disposable medical supplies will remain slightly below developing world norms in 2014. Moreover, demand will remain concentrated in common consumables, supplies and devices as only a small percentage of patients have access to advanced surgical and outpatient procedures. The necessity of many individuals to self-treat many injuries will account for 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, prefillable syringes and inhalers, and micro-catheters will remain negligible, at least in the near term.

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

296

Copyright 2010

SAMPLE
 TEXT

TABLE VI-6

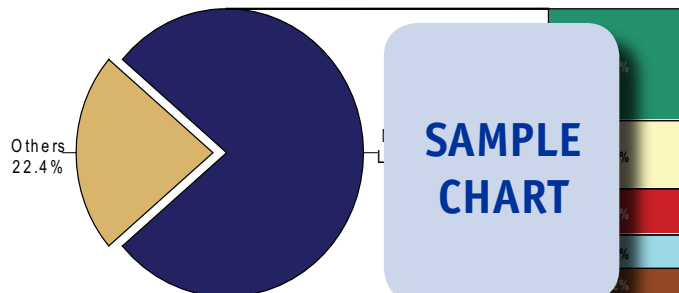
CHINA -- DEMAND FOR DISPOSABLE MEDICAL SUPPLIES BY TYPE (million dollars)

Item	1999	2004	2009	2014	2019
Population (million)					
per capita health expenditures					
Health Expenditures (bil \$)					
\$ disposables/000\$ health expend					
Medical Disposables Demand					
Wound Management Supplies					
Nonwoven Medical Disposables					
Diagnostic/Laboratory Disps					
Drug Delivery Devices					
Catheters & Accessories					
Surgical Disposables					
Sterilization Supplies					
Medical Gloves					
Other					
net exports					
Medical Disposables Shipments	1910	4030	8100	13500	21000

SAMPLE
 TABLE

CHART VIII-1

WORLD DISPOSABLE MEDICAL SUPPLIES MARKET SHARE BY COMPANY, 2009 (\$124.7 billion)



SAMPLE
 CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Aso LLC

300 Sarasota Center Boulevard
 Sarasota, FL 34240
 941-379-0300
<http://www.asocorp.com>

Annual Sales:
 Employment:

Key Products:
 tors and scar t

**SAMPLE
PROFILE**

Aso is an... adhesive bandages and suppliers... retail markets. The privately held... Aso operates via six divisions and worldwide affiliates: Aso Medical, Texas Aso, Aso Americas, Aso Europe, Aso Philippines and Aso Pharmaceutical.

Aso is active in the world disposable medical supply industry through the production of adhesive bandages, wound dressings, tapes, nasal dilators and scar treatment products. Adhesive bandages from the Company are available in clear, fabric, decorated, waterproof, water-resistant foam, hypo-allergenic, plastic, antibacterial, sheer, decorated, STRONG-STRIPS heavy-duty and waterproof STRONG-STRIPS types. In addition, Aso makes adhesive pads for use on knees, elbows and other large areas; small and large hydrocolloid bandages, which are designed to absorb exudates and maintain a moist wound environment; QWIK-SPOT bandages for use with small wounds caused by glucose testing lancets or injections; hypo-allergenic QWIK-STRIP soft, breathable dressings for use with sensitive skin; and butterfly closures and wound closure strips for closing small cuts and wounds.

394

Copyright 2010 The Freedonia Group, Inc.

TABLE VI-5

CHINA -- HEALTH CARE INDICATORS

Item	1999	2004	2009	2014	2019
Population (million)	1,212	1,328	1,392	1,456	1,520
% 65 years & older	7.4	8.4	9.4	10.4	11.4
Population 65 Years & Older (million)	89	111	131	151	172
per capita GDP	1,000	1,500	2,000	2,500	3,000
Gross Domestic Product (bil 2008\$)	10	20	30	40	50
per capita health expenditures	25	35	45	55	65
Health Expenditures (bil \$)	25	35	45	55	65
hospital beds/000 capita	6	7	8	9	10
Number of Hospital Beds (000)	7,272	9,296	11,320	13,344	15,368
physicians/000 capita	0.5	0.5	0.5	0.5	0.5
Number of Physicians (000)	500	666	833	1,000	1,167
Patient Activity (million):					
Hospital Admissions	100	100	100	100	100
Surgical Procedures	100	100	100	100	100
Outpatient Consultations	100	100	100	100	100

**SAMPLE
TABLE**

“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

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

Wipes

US wipes demand will rise 4.3 percent annually through 2014. Growth will decelerate from the 2004 to 2009 period, due to maturing markets and a shift toward more environmentally friendly consumer goods and cleaning methods. Disinfectant and electrostatic wipes will be the fastest growing types, and the industrial market will outpace the consumer segment. This study analyzes the \$1.8 billion US wipes industry, with forecasts for 2014 and 2019 by market, substrate and chemical. It also evaluates company market share and profiles industry participants.

#2697December 2010 \$4900

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 Wound Management Products

Global wound management product demand will rise 4.6% yearly through 2013. Best growth prospects include tissue sealants, foam and alginate wound dressings, growth factors, bioengineered tissue substitutes and anti-adhesion agents. China will be the fastest growing market, while the US remains the largest. This study analyzes the global market for wound management products, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates company market share and profiles industry players.

#2578 February 2010 \$5800

Infection Prevention Products & Services

US demand for infection prevention products and services will increase 4.8% annually through 2013. The best growth opportunities are anticipated in safety-enhanced devices that reduce the risk of health care acquired infections. Medical waste disposal and sterilization supplies, as well as high level disinfectants, will also do well. This study analyzes the \$18.6 billion US infection prevention industry, with forecasts for 2013 and 2018 by product, service and market. It also evaluates market share and profiles industry players.

#2526 August 2009 \$4700

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)