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World Disposable Medical Supplies

Industry Study with Forecasts for **2016 & 2021**

Study #2951 | October 2012 | \$6200 | 551 pages



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

www.freedoniagroup.com

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The upgrading and enforcement of infection prevention standards, coupled with an expanding volume of hospital, surgical, and outpatient procedures, will promote overall gains.

Global demand to rise 6.2% annually through 2016

World demand for disposable medical supplies is forecast to expand 6.2 percent annually to \$198 billion in 2016. The upgrading and enforcement of infection prevention standards, coupled with an expanding volume of hospital, surgical, and outpatient procedures, will promote overall gains. The United States, China, Japan, Germany, Russia, France, India, Italy, the United Kingdom, and Brazil will comprise the 10 largest national markets, combining to absorb nearly 70 percent of global demand in 2016. During the forecast period (2011-2016), average annual growth in these markets will range from 3.7 percent in Japan to over 11 percent in India. Demand for disposable medical supplies in the United States, Western Europe, Japan, and most other developed countries will expand at a below average pace as their medical delivery systems are well established, meet the health care needs of most residents, and have already adopted stringent infection prevention standards. By contrast, growth in the BRIC (Brazil, Russia, India, China) countries and many other emerging economies will exceed the world average as health care sectors are expanded, modernized, and adapted to formal infection prevention protocols.

Dialysis, lab disposables among best opportunities

Among the major disposable medical supply product segments, dialysis

World Disposable Medical Supply Demand, 2016 (\$198 billion)



Asia/Pacific
29%

North America
27%

Western Europe
24%

Other Regions
20%

disposables will post the fastest increases in global demand based on an expanding prevalence of end-stage renal disorders and the high frequency of therapeutic requirements. Other segments projected to command above average worldwide sales growth include diagnostic and laboratory disposables, respiratory supplies and devices, and infusion and hypodermic devices. The use of diagnostic and laboratory disposables will benefit from upward trends in cardiac testing and diabetes self-monitoring activities. An increasing base of allergy, asthma, and COPD -- chronic obstructive pulmonary disease -- patients receiving regular treatment will boost demand for respiratory supplies and devices, especially prefilled inhalers.

Rising preferences among medical providers for high value-added configurations with improved infection prevention safeguards will drive up sales of infusion and hypodermic devices.

Advances in disposable medical supplies are contributing significant improvements to the safety and outcome of patient procedures. Products such as Level 4 microbial resistant surgical gowns and drapes have reduced the risk of spreading air- and blood-borne infections during surgery. New polymer and bioengineered tissue sealants are decreasing the length of many surgical procedures and are promoting the faster recovery of post-operative patients.

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Sample Text,
 Table & Chart

ASIA/PACIFIC

India: Disposable Medical Supply Demand

Demand for disposable medical supplies in India is forecast to reach \$1.5 billion in 2011, an increase of 10 percent annually from 2006. The market is being driven by the expansion of the private health care delivery system, especially the private hospitals and clinics. Private hospitals and clinics are providing sales opportunities for disposable medical supplies. Additionally, these regions have access to self-care products such as adhesive bandages, glucose test strips, and incontinence garments and textiles. However, in spite of a burgeoning private sector, the market for disposable medical supplies in India is largely underserved as funding constraints will keep demand at public hospitals and outpatient facilities low and concentrate on expensive commodity goods.

In anticipation of strong long term growth, the Indian disposable medical supply industry has been attracting a fast increasing number of competitors. Approximately 3,000 local firms produce various lines of single-use medical products for both domestic and export sale. Included in this group are Amkay products, a maker of sterile containers and surgical supplies; Industrial Needs, a producer of respiratory supplies and devices; Labtech Disposables, a manufacturer of blood collection tubes and labware; Sutures India, a maker of wound closures and bandages; Tantra International, a manufacturer of infusion products; and ZAF Enterprise, a producer of nonwoven medical garments and textiles.

Besides local producers, a number of leading multinational corporations in the disposable medical supply industry are establishing manufacturing operations in India to take advantage of low labor costs and other investment incentives. For example, Abbott Laboratories is producing diabetes testing supplies, cardiac catheters, and enteral feeding tubes at Indian facilities in Mumbai and New Delhi. Ahlstrom operates

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SAMPLE
 TEXT

TABLE VI-8

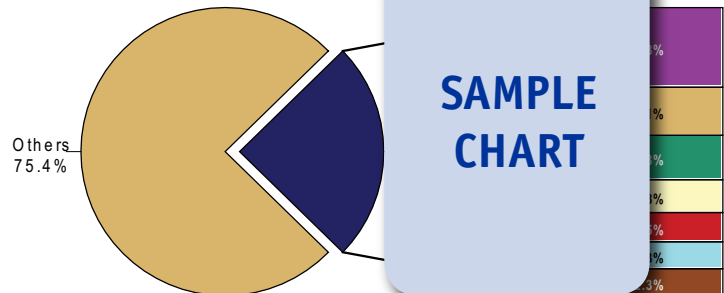
INDIA: DISPOSABLE MEDICAL SUPPLY DEMAND
 (million dollars)

Item	2001	2006	2011	2016	2021
Health Expenditures (bil \$)					
\$ disp medical supplies/000\$ expend					
Disposable Medical Supply Demand					
Surgical Instruments & Supplies					
Infusion & Hypodermic Devices					
Diagnostic & Laboratory Disposables					
Nonwoven Garments & Textiles					
Bandages & Wound Dressings					
Sterilization Supplies					
Respiratory Supplies & Devices					
Incontinence Products					
Dialysis Disposables					
Medical & Laboratory Gloves					
Patient Room Supplies					
Other Disposable Medical Supplies					
% India					
Asia/Pacific Disposable Medical Supplies					

SAMPLE
 TABLE

CHART VIII-1

WORLD DISPOSABLE MEDICAL SUPPLY MARKET SHARE
 (\$146.5 billion)



SAMPLE
 CHART

Sample Profile, Table & Forecast

COMPANY PROFILES

Degasa SA de CV

Prolongación Canal de Miramontes No. 3775
 Ex Hacienda San Juan del Dios
 Tlalpan, Mexico City 14300
 Mexico
 52-55-5483-3111
<http://www.degasa.com.mx>

Annual Sales:
 Employment:

Key Products: medical apparatus and medical appliances

**SAMPLE
PROFILE**

Degasa develops, manufactures, and distributes disposable surgical, wound care, and other medical supplies. The company maintains plants in Mexico City (2) and Cuernavaca, Mexico, and also operates six distribution centers throughout Mexico. In addition to serving the Mexican market, Degasa exports products to the US, Guatemala, Nicaragua, Honduras, the Dominican Republic, El Salvador, and Chile.

Degasa manufactures a variety of disposable medical supplies primarily under the DEGASA and PROTEC brand names. These supplies include gauze, latex gloves, syringes, medical apparel, and first aid kits. Gauze is produced in sterile and non-sterile varieties. Latex gloves encompass PROTEC surgical and examination types, while the Company's PROTEC syringes are intended for use with sterile, stainless steel needles. Among Degasa's medical apparel products are gowns and other nonwoven clothes for a variety of surgical and medical environments. First aid kits incorporate a variety of disposable items, including bandages and disinfectants.

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TABLE VI-7

INDIA: HEALTH CARE INDICATORS

Item	2001	2006	2011	2016	2021
Population (million)	1046	1130	1212	1291	1368
% 50 years & older	13.5	14.8	16.2	17.7	19.4
Population 50 Yrs & Older (million)	141	167	196	228	266
50 to 64 Years Old	83	96	111	127	145
65 Years & Older	58	71	85	101	121
\$ GDP/capita	100	150	200	250	300
Gross Domestic Product (bil 2010\$)	104	170	242	323	410
\$ health expenditures/capita	1.4	1.8	2.2	2.6	3.0
Health Expenditures (bil \$)	14.6	20.3	26.5	33.5	41.0
hospital beds/000 capita	0.1	0.1	0.1	0.1	0.1
Hospital Beds (000)	104	126	150	178	216
physicians/000 capita	0.1	0.1	0.1	0.1	0.1
Physicians (000)	104	126	150	178	216
admissions/000 capita	0.1	0.1	0.1	0.1	0.1
Hospital Admissions (million)	104	126	150	178	216
surgical procedures/000 capita	0.1	0.1	0.1	0.1	0.1
Surgical Procedures (million)	104	126	150	178	216
outpatient episodes/capita	0.1	0.1	0.1	0.1	0.1
Outpatient Episodes (million)	104	126	150	178	216

**SAMPLE
TABLE**

"Spurred by strong economic growth, total health expenditures in India are forecast to increase 9.3 percent annually to \$304 billion, or \$235 per capita, in 2016. Spending intensity will continue to be well below the world average as the medical delivery system reaches only about one-third of the population. Based on persisting deficiencies in inpatient and outpatient resources, India will allocate a large share of health outlays to pharmaceuticals and related goods."
 --Section VI, pg. 301

OTHER STUDIES

World Infection Prevention Products

World demand for infection prevention products is forecast to increase 6.4 percent annually to \$130 billion in 2017. Growth in emerging economies will lead gains as their health care sectors are expanded, modernized and adapted to formal infection prevention protocols. Protective apparel and textiles will remain the top selling product group. This study analyzes the \$95.4 billion world infection prevention product industry, with forecasts for 2017 and 2022 by product, world region and for 15 major countries. The study evaluates company market share and profiles industry players.

#2997 April 2013 \$6100

In Vitro Diagnostics

US demand for *in vitro* diagnostic (IVD) products will rise 6.1 percent annually to \$24.7 billion in 2016. Molecular diagnostic products will grow the fastest due to their advantages in the detection of infectious diseases, tumors and genetic disorders. Hospital labs will continue to comprise the largest and most diverse market. This study analyzes the \$18.4 billion US IVD products industry, with forecasts for 2016 and 2021 by type, application and market. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2923 July 2012 \$5100

World Wound Management Products

World demand for wound management products will increase 5.3 percent annually to \$39.3 billion in 2016. China will be the fastest growing market. Developed countries, led by the US, will remain a much larger market than developing countries. Wound healing agents and wound dressings will be among the fastest growing products. This study analyzes the \$30.3 billion world wound management product industry, with forecasts for 2016 and 2021 by type, world region and for 10 countries. The study also evaluates company market share and profiles industry players.

#2893 May 2012 \$6100

Disposable Medical Supplies

US disposable medical supplies demand will rise 4.3 percent yearly to \$46.7 billion in 2016. Syringes and inhalers, IV and urinary catheters, hemodialysis bloodlines, peritoneal dialysis kits, tissue sealants, biological wound dressings, Class IV garments and textiles, and blood glucose test strips will be among the fastest growing products. This study analyzes the \$37.8 billion US disposable medical supplies industry, with forecasts for 2016 and 2021 by product, market and material. The study also evaluates company market shares and profiles industry players.

#2853 March 2012 \$5100

Drug Delivery Products

US drug delivery product demand will rise 7.4 percent yearly to \$134 billion in 2015. Parenteral products will grow the fastest, led by monoclonal antibodies and polymer-encapsulated medicines. Other types expected to do well include pre-filled dry powder and metered dose brachytherapy implants, and implantable drug delivery products. This study analyzes the \$93.8 billion US drug delivery system industry, with forecasts for 2015 and 2020 by material, product and application. The study also evaluates company market share and profiles industry players.

#2829 January 2012 \$4800

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

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