INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

World Home Medical Equipment

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

Study #2964 | January 2013 | $6300 | 411 pages

www.freedoniagroup.com

Freedonia®

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

World Home Medical Equipment

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

Table of Contents

List of Tables/Charts

(continued on following page)

List of Tables/Charts

PRODUCT OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

INDUSTRY STRUCTURE

Study #2964
January 2013
$6300
411 Pages

World Home Medical Equipment

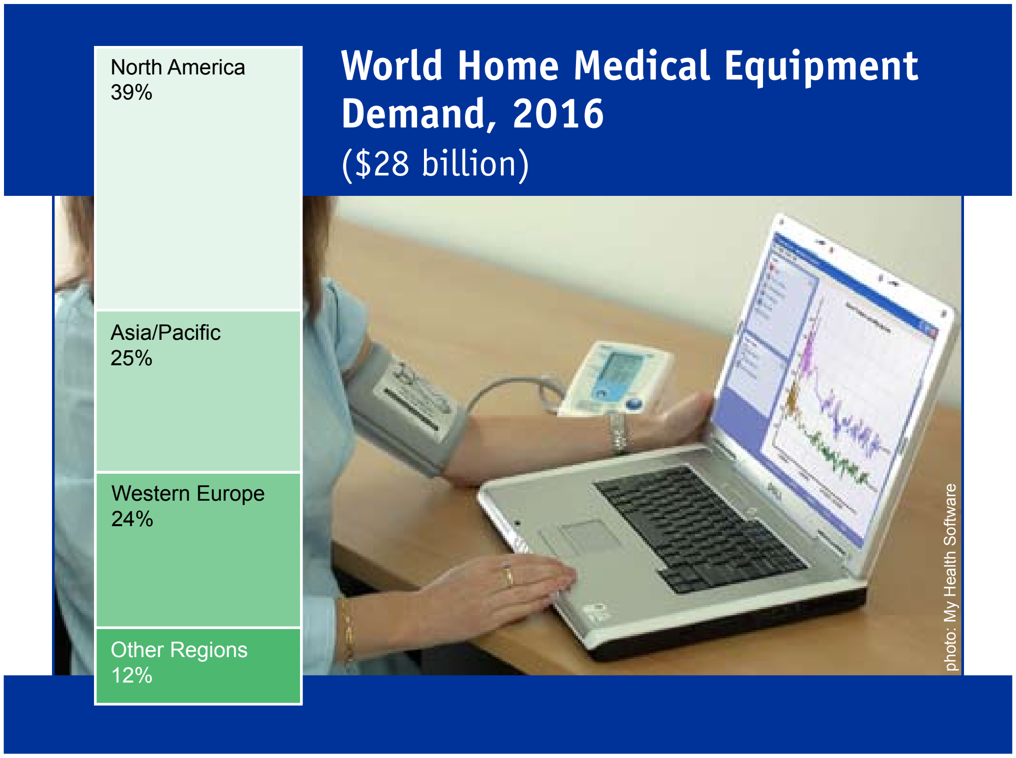
Industry Study with Forecasts for ***2016 & 2021***

Freedonia®

The US will remain the largest market based on its network of home health care providers, high health care spending, widespread insurance coverage, and shift toward home patient care.

World demand to rise 7% annually through 2016

World demand for home medical equipment is projected to increase 7.0 percent annually to $28 billion in 2016. The United States will remain the largest market globally based on its extensive network of home health care providers, high health care spending intensity, widespread insurance coverage for home treatment and management of chronic diseases, and shifting patient care strategies toward home settings. The large developing countries of Brazil, China, India, and Russia will be among the fastest growing worldwide markets for home medical equipment as increasing economic prosperity boosts the level of third-party and direct consumer payments applied to health care. In these countries, home health care activity will expand rapidly due to cost saving advantages and ongoing shortages in professional medical providers.



World Home Medical Equipment Demand, 2016
($28 billion)

Demand in developing countries to grow fastest

Home medical equipment markets in Western Europe, Canada, Australia, Japan, South Korea, and other developed countries will provide demand for a complete range of therapeutic, support, and monitoring products with per capita sales levels of all three groups staying comparatively high. However, overall growth in most of these markets will decelerate and will remain below the average worldwide pace as national health insurance plans impose tighter controls on benefit coverage and product reimbursement rates. By contrast, home medical equipment demand in the vast majority of developing countries will increase well above the global average as health care markets expand with improving economic growth. On the downside, affluent residents covered by private health insurance or who are able to afford direct payments will account for most sales in these countries.

Home therapeutic equipment to lead gains

Worldwide demand patterns for various types of home medical equipment will follow evolving demographic and epidemiological trends. An increasing prevalence of chronic conditions, especially respiratory disorders, kidney failure, and cancer, will boost global demand for home therapeutic equipment 7.5 percent annually to $17.3 billion in 2016. Portable oxygen concentrators for treating chronic obstructive pulmonary disease (COPD), continuous positive airway pressure (CPAP) products for managing obstructive sleep apnea, and ventilators and accessories for alleviating severe breathing impairments will account for the fastest sales growth among home respiratory therapy equipment. Advances in the ease of use and convenience features of dialysate machines, coupled with a rising number of patients with end-stage kidney failure, will boost demand for home dialysis products.

World Home Medical Equipment

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

Freedonia®

Sample Text, Table & Chart

TABLE VI-6

CHINA: HOME MEDICAL EQUIPMENT DEMAND
(million dollars)

Item	2001	2006	2011	2016	2021
Health Expenditures (bil $)					
$ home medical equip/000$ expend					
Home Medical Equipment Demand					
Therapeutic Equipment:					
Respiratory Therapy Equipment					
Oxygen Delivery Equipment					
CPAP Equipment					
Other Respiratory Therapy Equ					
Dialysis Equipment					
IV Equipment					
Other Home Therapeutic Equip					
Patient Support Equipment:					
Mobility Assist Equipment					
Medical Furniture					
Bathroom Safety Equipment					
Patient Monitoring Equipment:					
Blood Glucose Monitors					
Blood Pressure Monitors					
Other Patient Monitoring Equip					
% China					
Asia/Pacific Home Medical Equipment					

SAMPLE TABLE

ASIA/PACIFIC

China: Home Medical Equipment Demand

Demand for home medical equipment in China will incr billion in 2016. The aging of the po e of chronic conditions, and rising p gains. Home medical equipment is e in China. However, an increasing this equipment to take responsibility d visits to overcrowded hospital fac

SAMPLE TEXT

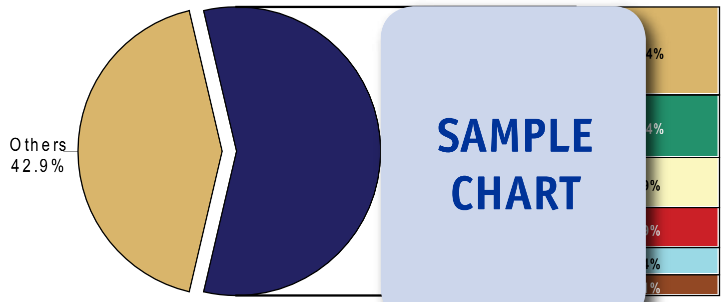
Although expanding at a fast pace, the market for home equipment in China faces a number of deterrents to overall g example, distribution systems for most products fail to exten rural areas. Moreover, in major cities where home medical e is widely available, affordability is often an issue among low residents. Lastly, the market has been flooded with poor qua produced by small companies that have escaped regulatory s Accordingly, many users have become disenchanted with sev of home medical equipment.

The vast potential of China's home medical equipment market will not be completely accessible to industry competitors until product quality issues are resolved and products become eligible for health insurance coverage. However, in spite of these obstacles to growth, most major industry producers are active in the country. Abbott Diabetes Care, ARKRAY, B. Braun Melsungen, Baxter International, DeVilbiss Healthcare, Fresenius Medical Care, GE Healthca Medtronic, OMRON HEALTHCARE, Philips Respironics, a Medical are among home medical equipment companies tha ate production facilities in China. The vast majority of other participants serve the country through company operated sal partnerships with local firms.

238 Copyright 2013

CHART VIII-1

HOME THERAPEUTIC EQUIPMENT MARKET SHARE
($12.1 billion, 2011)



SAMPLE CHART

Click here to purchase online

Order now, click here!

World Home Medical Equipment

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

Sample Profile, Table & Forecast

TABLE III-16

WORLD IV EQUIPMENT DEMAND BY TYPE
(million dollars)

Item	2001	2006	2011	2016	2021
World Population 65 Yrs & Older (mil)					
$ equipment/pop 65 & older					
World Home IV Equipment Demand1					
Injection Devices					
IV Administration Sets					
Premixed IV Solutions					
IV Catheters					
IV Pumps					
IV Accessories					
% IV equipment					
World Home Therapeutic Equipment					

SAMPLE TABLE

COMPANY PROFILES

CareFusion Corporation
3750 Torrey View Court
San Diego, CA 92130
858-617-2000
http://www.carefusion.com

Revenues: $3
Employment:

Key Products ... positive airway pressure syste

CareFus ... edical devices and services. ... ents: Medical Systems and F

SAMPLE PROFILE

CareFusion participates in the world home medical equipment industry through the Medical Systems segment, which generated FY 2012 revenues of $2.3 billion. Through this segment, the Company develops, manufactures, and markets equipment and related supplies for respiratory care, intravenous infusion, medication dispensing, and other applications. CareFusion's respiratory care products include nebulizers, ventilators, and continuous positive airway pressure (CPAP) systems and related accessories that are suitable for home use. Of the segment's total FY 2012 revenues, respiratory care products accounted for $295 million.

CareFusion's nebulizers for home use include the AIRLIFE MISTY MAX 10 disposable model, which incorporates a one piece jet design engineered to deliver high output rates for faster treatment times and consistent medication delivery; and the AIRLIFE MISTY INFINITY unit, which provides continuous aerosol therapy, and features spill resistant caps and built-in intravenous ports. The Company also makes

341

ORDER INFORMATION

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2600, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2964

World Home Medical Equipment $6300

☐ Corporate Use License (add to study price) * +$2600

___ Additional Print Copies @ $600 each *

Total (including selected option) $________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

Credit Card # ________________

Expiration Date MM __ YY __

Signature ________________

Name ________________

Title ________________

Company ________________

Division ________________

Street ________________ (No PO Box please)

City/State/Zip ________________

Country ________________

Phone ________________ Fax ________________

Email ________________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ________________

☐ Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2600; one additional user, add $600; two additional users, add $1200; three additional users, add $1800.

Signature ________________

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com

Freedonia®

Other Studies

Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 6.9 percent yearly to $2.3 billion in 2017. Whole-house air treatment systems will be the fastest growing segment, while point-of-use water treatment systems will remain the largest. Water filters and membranes will remain the largest consumables category. This study analyzes the $1.6 billion US consumer market for water and air treatment systems, with forecasts for 2017 and 2022 by technology, product, and region. The study also evaluates company market share and profiles industry players.

#3032 .... May 2013 .... $5300

Elder Care Services

Revenues for the elder care services industry in the US will grow 5.2 percent per year through 2016 to $319.5 billion. Skilled nursing facilities will remain the largest segment, while home health care services and assisted living facilities see the most rapid growth. Medicaid will remain the largest payment source, while Medicare leads gains. This study analyzes the $249 billion US elder care service industry, with forecasts for 2016 and 2021 by type, provider, payment source and US region. The study also evaluates company market share and profiles industry players.

#2965 ....December 2012 .... $4900

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

Implantable Medical Devices

US demand for implantable medical devices is forecast to increase 7.7 percent annually to $52 billion in 2015. Orthopedic implants will remain the largest segment and be one of the fastest growing. Pacing devices will lead gains among cardiovascular implants. Other implants expected to do well include neurostimulators and drug implants. This study analyzes the $36 billion US implantable medical device industry, with forecasts for 2015 and 2020 by implant procedure, material and type. The study also evaluates company market share and profiles industry players.

#2852 .... 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 prefilled dry powder and metered dose brachytherapy implants, and implant-able 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

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