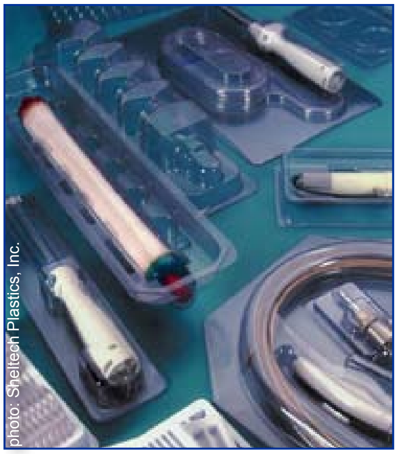
INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS



World Medical Device Packaging

Industry Study with Forecasts for **2017 & 2022**

Study #3056 | August 2013 | $6100 | 319 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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NORTH AMERICA

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INDUSTRY STRUCTURE

The fastest growing markets include India, Mexico, China, and the more prosperous Africa/Mideast countries, where market and regulatory forces are raising packaging quality and functionality.

Global demand to rise 5.9% annually through 2017

World demand for medical device packaging is projected to increase 5.9 percent annually to $25.7 billion in 2017. Reflecting the operation of advanced and diversified medical product industries, the US, Western Europe, and Japan will continue to account for almost 60 percent of the total market. However, demand in these countries will expand below the average global pace as intensifying health care cost containment pressures and fierce multiple supplier competition weaken growth prospects for medical device production and heighten the price sensitivity of their producers to packaging costs. The fastest expanding medical device packaging markets will emerge in India, Mexico, China, and the more prosperous Africa/Mideast countries, where diversification, expansion, and stricter regulation of medical product industries are raising the quality and functional requirements of containers and related accessories.

US to remain top market

The US will continue to be the largest market for medical device packaging as its advanced medical product producers commercialize new high value-added supplies, instruments, and equipment with specialized packaging needs. Gains in West European and Japanese demand will also benefit from new product introductions, as well as from the upgrading of government and industry standards covering the barrier, security, and tracking properties of medical device packaging. In the developing world, China will provide the largest and broadest sales opportunities for medical device containers and related accessories due to burgeoning domestic and export markets for its medical goods. Spurred by rising internal and external investment, China is evolving into a leading worldwide developer and supplier of technologically advanced medical products.

Pouches, trays to remain fastest growing containers

Based on adaptability to cost effective infection-resistant and security-enhanced formats, pouches and trays will continue to lead sales among container types. Growth in pouch demand will reflect ongoing advances in strength, puncture resistance, and barrier properties, which will expand applications in the packaging of small- to medium-sized supplies and devices, including sharps. Multiple compartment trays will build sales as they virtually eliminate the risk of staff errors and the spread of infectious agents during the preparation of products for surgery and various other patient procedures. Clamshell packs will also fare well in the global marketplace as they match or exceed all the advantages of rigid trays while offering greater protection against product damage during transport and storage.

World Medical Device Packaging

Industry Study with Forecasts for *2017 & 2022*

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Sample Text, Table & Chart

TABLE VI-4

CHINA: MEDICAL DEVICE PACKAGING DEMAND BY TYPE (million dollars)

Item	2002	2007	2012	2017	2022
Medical Device Shipments (bil $)					
$ packaging/000$ medical devices					
Medical Device Packaging Demand					
Containers:					
Pouches					
Trays					
Clamshell Packs					
Bags					
Boxes					
Other Containers					
Packaging Accessories:					
Labels					
Lidding					
Other Accessories					
% China					
Asia/Pacific Medical Device Packaging					

SAMPLE TABLE

ASIA/PACIFIC

China: Medical Device Packaging Demand

Demand for medical device packaging products in Chin… increase … billion in 2017, re… almost o… ’s total. The coun… the seco… se products based p… on the in… and outpatient serv… country’… tpatient episode rat… as hospi… ilities in surgery a… institution… domestic medical de… try will broaden and diversify production capabilities and wi… purchases of all types of packaging products.

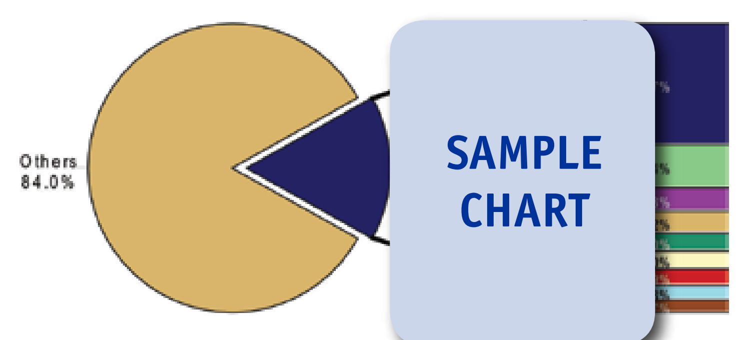
SAMPLE TEXT

Over the long term, China will remain well above the w… for growth in all groups of medical device packaging. Trays… packs, and vials will see especially strong gains in demand a… tional concerns expand the production of medical appliances, instru-ments, and supplies in the country to serve the large domestic and nearby export markets. These containers, along with sterile and sterilizable pouches, bags, and lidding, will also benefit from strategies adopted by government health agencies and medical providers to control the spread of infection and improve the overall quality of health care. Lastly, rapid growth in new product introductions and the greater penetration of de-veloped world export markets will broaden the use of high value-added security and tracking labels and components by the medical device industry of China.

Approximately 500 producers supply medical device pa… China. Major competitors with manufacturing operations in… include Amcor Flexibles, Chesapeake’s Pharmaceutical and… Packaging division, DuPont Teijin Films, Klöckner Pentapla… Westvaco, Oliver-Tolas Healthcare Packaging, Perfecseal (B… Printpack, Shanghai Toppan Printing, and Sigma Medical Su…

CHART VIII-1

WORLD MEDICAL DEVICE PACKAGING MERCHANT MARKET SHARE BY COMPANY ($12.9 billion, 2012)



World Medical Device Packaging

Industry Study with Forecasts for ***2017 & 2022***

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Sample Profile, Table & Forecast

TABLE III-6

WORLD MEDICAL DEVICE POUCH DEMAND BY TYPE
(million dollars)

Item	2002	2007	2012	2017	2022
World Outpatient Episodes (billion)					
pouches/000 episodes					
World Medical Device Pouches (bil un					
cents/unit					
World Medical Device Pouches					
Surgical & Medical Instruments					
Surgical Appliances & Supplies					
Diagnostic Products					
Biomedical Equipment					
Dental Supplies & Equipment					
% pouches					
World Medical Device Container Demand					

SAMPLE TABLE

COMPANY PROFILES

Technipaq Incorporated
975 Lutter Drive
Crystal Lake, IL 60014
815-477-1800
http://www.te

Annual Sales:
Employment:

Key Products: insert cards

SAMPLE PROFILE

Technipaq is a fabricator of flexible packaging materials and components for use in the packaging of medical supplies and devices, diagnostic products, and pharmaceuticals. Technipaq is privately held.

Technipaq is active in the world medical device packaging industry through the production of pouches, rollstock, lidstock, and die cut insert cards that can withstand ethylene oxide, radiation, and autoclave sterilization processes. Pouches include TECHNI-PEEL peelable; TECHNI-VENT header; and TECHNI-POUCH barrier, zipper, and standup types. TECHNI-PEEL peelable pouches have easy opening features and can be made from specialty film and foil laminations, clear high barrier laminations, and TYVEK (DuPont -- US) high density polyethylene (HDPE) fiber. The Company's TECHNI-VENT header pouches, which feature TYVEK HDPE fiber headers, are produced from puncture- and abrasion-resistant films and laminates. TECHNI-POUCH barrier pouches, which are designed to offer high moisture and gas barrier properties, are manufactured from high barrier materials such as specialty films and foil laminates. Technipaq's TECHNI-POUCH zipper and standup pouches can be printed in up to eight colors and are available in bottom gusset, single sided gusset, and double sided gusset configurations.

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STUDY COVERAGE

This 319-page Freedonia industry study, ***World Medical Device Packaging***, presents historical demand data (2002, 2007, 2012) plus forecasts for 2017 and 2022 for products by type, application, world region and in 14 countries. The study also assesses market environment factors, evaluates company market share and profiles 25 global industry players.

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Other Studies

Labels

Label demand in the US is projected to climb 4.2 percent annually to $19.1 billion in 2017. Paper will continue to account for the majority of label stock, but plastic stock will continue to capture share from paper in a broad range of label applications based on aesthetic and performance advantages. This study analyzes the $15.6 billion US label industry, with forecasts for 2017 and 2022 by raw and stock material, application method, printing technology, and function. The study also evaluates company market share and profiles industry players.

#3057 .... July 2013 .... $5300

World Pharmaceutical Packaging

World demand for drug packaging products will increase 6.4 percent annually to $90 billion in 2017. Most demand will remain in the developed economies of Canada, Japan, the US, and Western Europe. Prefillable syringes and parenteral vials will lead growth as new injectable therapies are introduced. This study analyzes the $66 billion world drug packaging industry, with forecasts for 2017 and 2022 by product, world region, and for 16 major countries. The study also evaluates company market share, profiles industry players and examines raw material usage.

#3025 .... May 2013 .... $6500

Plastic Film

Demand for plastic film in the US is forecast to grow 1.8 percent annually to 15.9 billion pounds in 2016. LLDPE will remain the leading film. Among the low volume plastic resins used in film, degradable plastics will lead gains, followed by cellophane and ethylene vinyl alcohol. Packaging will remain the dominant market, but will be outpaced by nonpackaging applications. This study analyzes the 14.5 billion pound US plastic film industry, with forecasts for 2016 and 2021 by type and market. The study also evaluates company market share and profiles industry players.

#2955 ....December 2012 .... $5100

Plastic Containers

US demand for plastic containers is forecast to increase 4.9 percent annually to $32.4 billion in 2016, consuming 14.2 billion pounds of resin. Plastic bottles and jars will remain the dominant segment but will be outpaced by other plastic container types, including tubs, cups, bowls and pails. Among the leading resins, PET will continue outpacing HDPE. This study analyzes the 13 billion pound US plastic container industry, with forecasts for 2016 and 2021 by type and resin. The study also evaluates company market share and profiles industry players.

#2954 .... October 2012 .... $5100

Pouches

Demand for pouches in the US is projected to increase 5.1 percent per year to $8.8 billion in 2016. Gains will be driven by faster growth for stand-up pouches stemming from sustainability, functional, and marketing advantages over alternative packaging media. The nonfood market will slightly outpace the dominant food market. This study analyzes the $6.9 billion US market for pouches, with forecasts for 2016 and 2021 by type, market, feature and production method. The study also evaluates company market share and profiles industry players.

#2899 .... July 2012 .... $4900

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