



[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 5](#)

[Sample Text, Table & Chart 6](#)

[Sample Profile, Table & Study Coverage 7](#)

[Order Form & Corporate Use License 8](#)

[About Freedonia, Custom Research, Related Studies 9](#)

Disposable Medical Supplies

US Industry Study with Forecasts for **2020 & 2025**

Study #3378 | February 2016 | \$5500 | 444 pages

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

| | |
|---------------------------------------|----|
| General..... | 4 |
| Macroeconomic Trends | 5 |
| Demographic Patterns | 8 |
| Healthcare Trends | 11 |
| Health Insurance | 12 |
| Medical Conditions..... | 14 |
| Acute Conditions..... | 14 |
| Chronic Conditions | 16 |
| National Health Expenditures..... | 19 |
| Spending Categories..... | 20 |
| Funding Sources..... | 23 |
| Medical Providers..... | 27 |
| Hospitals | 28 |
| Outpatient Facilities..... | 29 |
| Physicians & Physicians' Offices..... | 31 |
| Other Medical Providers | 32 |
| Skilled Nursing Homes..... | 33 |
| Dentists & Dental Offices..... | 34 |
| Other Health Establishments..... | 34 |
| Patient Activity | 35 |
| Hospital Activity..... | 36 |
| Outpatient Activity | 37 |
| Surgical Procedures..... | 38 |
| Diagnostic Tests | 39 |
| Medical Product Markets..... | 40 |
| Pharmaceuticals | 42 |
| Medical Supplies & Devices..... | 43 |
| Surgical & Medical Instruments | 44 |
| Surgical Appliances & Supplies..... | 44 |
| Diagnostic Products..... | 44 |
| Electromedical Equipment..... | 45 |
| Ophthalmic Goods..... | 45 |
| Dental Equipment & Supplies..... | 46 |

RAW MATERIALS

| | |
|---------------------------------|----|
| General..... | 47 |
| Plastic Resins | 49 |
| Polyvinyl Chloride | 51 |
| Polypropylene | 53 |
| Thermoplastic Elastomers..... | 54 |
| Low Density Polyethylene | 55 |
| Acrylic..... | 57 |
| Polycarbonate | 57 |
| ABS | 58 |
| Thermoplastic Polyesters | 58 |
| High Density Polyethylene | 59 |
| Polyurethane..... | 60 |
| Other Plastic Resins..... | 60 |
| Nonwoven Fabrics | 62 |
| Paper & Paperboard..... | 64 |

| | |
|--------------------------|----|
| Rubber Materials | 65 |
| Other Raw Materials..... | 66 |

PRODUCT OVERVIEW

| | |
|---|----|
| General..... | 68 |
| Disposable Medical Supply Product Groups | 71 |
| Historical Demand Patterns | 72 |
| Regulatory Considerations | 73 |
| New Product Approval Requirements | 74 |
| Healthcare-Associated Infection Safeguards | 74 |
| Supply & Device Reprocessing Standards..... | 75 |
| Occupational Safety & Health Administration (OSHA) Standards | 77 |
| US Trade | 77 |
| International Markets | 79 |

DRUG DELIVERY & RELATED PRODUCTS

| | |
|---|-----|
| General..... | 83 |
| Disposable Infusion Products | 86 |
| Disposable IV Administration Sets | 87 |
| Premixed IV Solutions..... | 90 |
| Disposable IV Catheters..... | 92 |
| Other Disposable Infusion Products..... | 95 |
| Enteral Feeding Sets | 95 |
| IV Accessories | 96 |
| Disposable Hypodermic Products | 97 |
| Prefillable Syringes..... | 98 |
| Injectors..... | 99 |
| Cartridge Devices..... | 102 |
| Clinical Hypodermic Syringes..... | 105 |
| Clinical Hypodermic Needles | 107 |
| Disposable Inhalation Products..... | 109 |
| Prefillable Inhalers..... | 111 |
| Metered Dose Inhalers..... | 112 |
| Dry Powder Inhalers..... | 115 |
| Disposable Oxygen Therapy Supplies..... | 117 |
| Anesthesia Disposables..... | 119 |
| Disposable Nebulizers & Accessories | 121 |
| Disposable Humidifiers | 123 |
| Other Inhalation Disposables | 124 |
| Disposable Dialysis Products..... | 125 |
| Disposable Hemodialysis Products..... | 127 |
| Disposable Peritoneal Dialysis Products | 128 |
| Transdermal Patches..... | 130 |

WOUND MANAGEMENT PRODUCTS

| | |
|---|-----|
| General..... | 134 |
| Wound Closures..... | 137 |
| Sutures..... | 138 |
| Absorbable Sutures | 140 |
| Nonabsorbable Sutures | 142 |
| Surgical Staples/Disposable Stapling Devices..... | 143 |

| | |
|---|-----|
| Tissue Sealants | 146 |
| Cyanoacrylates | 147 |
| Fibrin..... | 148 |
| Other Tissue Sealants..... | 149 |
| Other Wound Closures | 151 |
| Anti-Adhesion Products..... | 152 |
| Hemostats..... | 153 |
| Ligature Clips..... | 154 |
| Suture Accessories..... | 155 |
| Disposable Bandages | 155 |
| Adhesive Bandages | 156 |
| Adhesive Tapes..... | 160 |
| Cast Bandages & Accessories | 162 |
| Gauze Bandages..... | 164 |
| Pads & Compresses | 166 |
| Other Disposable Bandages | 167 |
| Wound Dressings..... | 169 |
| Biological & Synthetic Wound Dressings | 170 |
| Film Dressings | 171 |
| Hydrocolloid Dressings | 172 |
| Collagen Dressings..... | 173 |
| Foam Dressings..... | 175 |
| Hydrogel Dressings..... | 176 |
| Alginate Dressings | 177 |
| Other Biological & Synthetic Wound Dressings | 178 |
| Non-Adherent Wound Dressings | 180 |
| Gauze Wound Dressings..... | 181 |
| Contact Layers..... | 183 |
| Other Disposable Wound Management Products..... | 183 |
| First Aid Kits..... | 184 |
| Medical Sponges..... | 185 |
| Medical Cotton Goods | 187 |

NONWOVEN MEDICAL DISPOSABLES

| | |
|--|-----|
| General..... | 188 |
| Disposable Nonwoven Medical Garments & Textiles | 190 |
| Disposable Nonwoven Surgical & Patient Gowns | 192 |
| Disposable Nonwoven Surgical Gowns..... | 193 |
| Disposable Nonwoven Patient Gowns | 196 |
| Disposable Nonwoven Surgical Drapes..... | 198 |
| Disposable Nonwoven Face Masks | 201 |
| Other Disposable Nonwoven Garments & Textiles..... | 203 |
| Disposable Nonwoven Staff Apparel..... | 204 |
| Disposable Nonwoven Towels & Bedding | 205 |
| All Other Disposable Nonwoven Garments & Textiles | 206 |
| Incontinence Disposables..... | 207 |
| Disposable Adult Undergarments | 208 |
| Disposable Adult Shields | 210 |
| Disposable Incontinence Underpads..... | 211 |
| Other Incontinence Disposables | 213 |

(continued on following page)

Table of Contents

(continued from previous page)

OTHER DISPOSABLE MEDICAL SUPPLIES

| | |
|--|-----|
| General..... | 216 |
| Infection Prevention Supplies..... | 218 |
| Sterilization Supplies..... | 219 |
| Sterile Containers..... | 220 |
| Sterilization Wrap..... | 229 |
| Sterilization Indicators..... | 232 |
| Disposable Medical Gloves..... | 236 |
| Examination Gloves..... | 237 |
| Surgical Gloves..... | 239 |
| Waste Disposal Supplies..... | 243 |
| Disposable Waste Disposal Containers..... | 244 |
| Disposable Waste Disposal Accessories..... | 246 |
| Diagnostic & Laboratory Disposables..... | 247 |
| Diabetes Testing Supplies..... | 248 |
| Blood Glucose Test Strips..... | 249 |
| Other Diabetes Testing Supplies..... | 251 |
| Disposable Blood Collection Supplies..... | 252 |
| Disposable Labware..... | 254 |
| Disposable Diagnostic Catheters..... | 256 |
| Angiography Catheters..... | 257 |
| Other Disposable Diagnostic Catheters..... | 258 |
| Other Diagnostic & Laboratory Disposables..... | 259 |
| Home Test Kits..... | 260 |
| Disposable Physicians' Examination Supplies..... | 261 |
| Disposable Temperature Measuring Products..... | 263 |
| Disposable Electrodes..... | 264 |
| Surgical Disposables..... | 265 |
| Disposable Procedural Kits & Trays..... | 266 |
| Cardiovascular Surgery..... | 267 |
| Orthopedic Surgery..... | 269 |
| Chest Drainage Units..... | 270 |
| Other Procedural Kits & Trays..... | 270 |
| Disposable Surgical Catheters..... | 271 |
| Angioplasty Catheters..... | 272 |
| Other Disposable Surgical Catheters..... | 273 |
| Disposable Surgical Instruments..... | 276 |
| Plastic Surgical Drapes..... | 278 |
| All Other Disposable Medical Supplies..... | 279 |
| Disposable Patient Room Supplies..... | 280 |
| Disposable Urinary Catheters & Accessories..... | 282 |
| Foley Catheters..... | 284 |
| Other Disposable Urinary Catheters..... | 285 |
| Urinary Drainage Accessories..... | 285 |
| Disposable Ostomy Supplies..... | 286 |
| Procedures..... | 286 |
| Products..... | 287 |
| Disposable Enema Products..... | 288 |

MARKETS

| | |
|--------------------------------------|-----|
| General..... | 291 |
| Hospital Market..... | 293 |
| Consumer/Home Healthcare Market..... | 296 |
| Outpatient Market..... | 297 |
| Ambulatory Surgery Centers..... | 299 |
| Urgent Care Centers..... | 300 |
| General Medical Clinics..... | 301 |
| Other Outpatient Facilities..... | 301 |
| Physicians' Office Market..... | 302 |
| Nursing Home Market..... | 304 |
| Dental Office Market..... | 306 |
| Other Markets..... | 307 |

INDUSTRY STRUCTURE

| | |
|-------------------------------------|-----|
| General..... | 310 |
| Market Share..... | 316 |
| Competitive Strategies..... | 323 |
| Mergers & Acquisitions..... | 324 |
| Licensing & Related Agreements..... | 327 |
| Research & Development..... | 332 |
| Marketing & Distribution..... | 333 |
| Manufacturing..... | 334 |

COMPANY PROFILES

| | |
|-------------------------------------|-----|
| Abbott Laboratories..... | 337 |
| Ahlstrom Corporation..... | 339 |
| Ansell Limited..... | 341 |
| Bard (CR) Incorporated..... | 345 |
| Baxter International..... | 350 |
| Becton, Dickinson, and Company..... | 354 |
| Boston Scientific..... | 360 |
| Braun (B.) Melsungen..... | 363 |
| Cardinal Health..... | 368 |
| ConvaTec Healthcare..... | 374 |
| Domtar Corporation..... | 378 |
| Halyard Health..... | 380 |
| Johnson & Johnson..... | 385 |
| Kimberly-Clark Corporation..... | 391 |
| Medline Industries..... | 393 |
| Medtronic plc..... | 397 |
| Mölnlycke Health Care..... | 405 |
| Pfizer Incorporated..... | 408 |
| Semperit AG..... | 412 |
| Smith & Nephew..... | 414 |
| Smiths Group..... | 418 |
| STERIS Corporation..... | 421 |
| Svenska Cellulosa..... | 423 |
| Teleflex Incorporated..... | 424 |
| Terumo Corporation..... | 431 |
| 3M Company..... | 435 |
| Unilife Corporation..... | 440 |

List of Tables/Charts

EXECUTIVE SUMMARY

| | |
|----------------------|---|
| 1 Summary Table..... | 3 |
|----------------------|---|

MARKET ENVIRONMENT

| | |
|---|----|
| 1 Macroeconomic Indicators..... | 8 |
| 2 Resident Population by Age Group..... | 11 |
| 3 Health Insurance Coverage of the US Population 2005-2015..... | 14 |
| 4 Acute Conditions by Type..... | 16 |
| 5 Chronic Conditions by Type..... | 19 |
| 6 National Health Expenditures by Spending Category..... | 23 |
| 7 National Health Expenditures by Funding Source..... | 26 |
| Cht National Health Expenditures by Payment Source, 2015..... | 27 |
| 8 Hospitals..... | 29 |
| 9 Outpatient Facilities..... | 30 |
| 10 Physicians & Physicians' Offices..... | 32 |
| 11 Other Medical Providers..... | 33 |
| 12 Hospital Activity..... | 36 |
| 13 Outpatient Activity..... | 38 |
| 14 Surgical Procedures..... | 39 |
| 15 Diagnostic Tests..... | 40 |
| 16 Medical Product Demand by Type..... | 41 |
| Cht Medical Product Demand by Type, 2015..... | 42 |

RAW MATERIALS

| | |
|---|----|
| 1 Disposable Medical Supply (DMS) Raw Material Demand by Product Group..... | 48 |
| Cht Disposable Medical Supply Raw Material Demand by Type, 2015..... | 49 |
| 2 Plastic Resin Demand in Disposable Medical Supplies (DMS) by Type..... | 51 |
| 3 Nonwoven Fabric Demand in Disposable Medical Supplies..... | 64 |
| 4 Paper & Paperboard Demand in Disposable Medical Supplies..... | 65 |
| 5 Rubber Material Demand in Disposable Medical Supplies..... | 66 |
| 6 Other Raw Material Demand in Disposable Medical Supplies..... | 67 |

PRODUCT OVERVIEW

| | |
|--|----|
| 1 Disposable Medical Supplies Demand by Product Group..... | 70 |
| Cht Disposable Medical Supplies Demand by Product Group, 2015..... | 71 |
| 2 Disposable Medical Supplies Historical Demand Patterns, 2005-2015..... | 73 |
| 3 US Trade in Disposable Medical Supplies..... | 79 |

(continued on following page)

List of Tables/Charts

(continued from previous page)

4 World Disposable Medical Supplies Demand by Region82

DRUG DELIVERY & RELATED PRODUCTS

1 Disposable Drug Delivery Product Demand 85
 Cht Disposable Drug Delivery Product Demand by Type, 201586

2 Disposable Infusion Product Demand by Type.....87

3 Disposable IV Administration Set Demand by Type90

4 Premixed IV Solution Demand by Type.....92

5 Disposable IV Catheter Demand by Type94

6 Other Disposable Infusion Product Demand by Type.....95

7 Disposable Hypodermic Product Demand by Type.....98

8 Prefillable Syringe Demand by Type.....99

9 Clinical Hypodermic Syringe Demand107

10 Clinical Hypodermic Needle Demand.....109

11 Disposable Inhalation Product Demand by Type.....110

12 Prefillable Inhaler Demand by Type112

13 Disposable Oxygen Therapy Supplies Demand119

14 Anesthesia Disposables Demand by Type.121

15 Disposable Nebulizer/Accessory Demand.122

16 Disposable Humidifier Demand.....124

17 Other Inhalation Disposables Demand.....125

18 Disposable Dialysis Product Demand126

19 Disposable Hemodialysis Product Demand by Type.....128

20 Disposable Peritoneal Dialysis Product Demand by Type.....130

21 Transdermal Patch Demand.....133

WOUND MANAGEMENT PRODUCTS

1 Disposable Wound Management Product Demand by Type.....136
 Cht Disposable Wound Management Product Demand by Type, 2015137

2 Wound Closure Demand by Type138

3 Suture Demand by Type.....140

4 Surgical Staple & Disposable Stapling Device Demand by Type146

5 Tissue Sealant Demand.....147

6 Other Wound Closure Demand.....152

7 Disposable Bandage Demand by Type156

8 Adhesive Bandage Demand159

9 Adhesive Tape Demand161

10 Cast Bandage & Accessory Demand.....163

11 Gauze Bandage Demand165

12 Pad & Compress Demand.....167

13 Other Disposable Bandage Demand.....169

14 Wound Dressing Demand by Type170

15 Biological & Synthetic Wound Dressing Demand by Type171

16 Non-Adherent Wound Dressing Demand by Type.....181

17 Other Disposable Wound Management Product Demand by Type.....184

NONWOVEN

MEDICAL DISPOSABLES

1 Nonwoven Medical Disposables Demand by Type.....190

2 Disposable Nonwoven Garment & Textile Demand by Type.....191
 Cht Nonwoven Garment & Textile Demand by Type, 2015192

3 Disposable Nonwoven Surgical & Patient Gown Demand.....193

4 Disposable Nonwoven Surgical Gown Demand.....196

5 Disposable Nonwoven Patient Gown Demand.....197

6 Disposable Nonwoven Surgical Drape Demand by Type201

7 Disposable Nonwoven Face Mask Demand by Type203

8 Other Disposable Nonwoven Garment & Textile Demand by Type.....204

9 Incontinence Disposables Demand by Type.....208

OTHER DISPOSABLE MEDICAL SUPPLIES

1 Other Disposable Medical Supplies Demand by Product Group217
 Cht Other Disposable Medical Supplies Demand by Product Group, 2015.....218

2 Disposable Infection Prevention Supplies by Type.....219

3 Disposable Sterilization Supplies Demand by Type.....220

4 Sterile Container Demand by Type.....221

5 Disposable Sterilization Wrap Demand by Type.....232

6 Sterilization Indicators Demand by Type ...234

7 Disposable Medical Glove Demand by Type 237

8 Disposable Examination Glove Demand....239

9 Disposable Surgical Glove Demand.....242

10 Disposable Waste Disposal Supplies Demand by Type.....244

11 Diagnostic & Laboratory Disposables Demand by Type.....248

12 Diabetes Testing Product Demand by Type.....249

13 Disposable Blood Collection Supplies Demand254

14 Disposable Labware Demand255

15 Disposable Diagnostic Catheter Demand by Type.....256

16 Other Diagnostic & Laboratory Disposables Demand by Type.....260

17 Surgical Disposables Demand by Type266

18 Disposable Procedural Kit & Tray Demand by Type267

19 Disposable Surgical Catheter Demand by Type.....272
 (continued on following page)

20 Disposable Surgical Instrument Demand by Type.....278

21 Plastic Surgical Drape Demand279

22 All Other Disposable Medical Supplies Demand by Type280

23 Patient Room Supplies Demand282

24 Disposable Urinary Catheters & Accessories Demand by Type284

25 Disposable Ostomy Supplies by Type286

26 Disposable Enema Product Demand.....290

MARKETS

1 Disposable Medical Supplies Demand by Market.....292
 Cht Disposable Medical Supplies Demand by Market, 2015293

2 Hospital Market Demand for Disposable Medical Supplies by Product Group295

3 Consumer/Home Healthcare Market Demand for Disposable Medical Supplies by Product Group297

4 Outpatient Market Demand for Disposable Medical Supplies by Product Group & Facility.....299

5 Physicians' Office Market for Disposable Medical Supplies by Product Group303

6 Nursing Home Market Demand for Disposable Medical Supplies by Product Group305

7 Dental Office Market Demand for Disposable Medical Supplies by Product Group307

8 Other Markets Demand for Disposable Medical Supplies by Product Group309

INDUSTRY STRUCTURE

1 US Disposable Medical Supplies Sales by Company, 2015.....311
 Cht Disposable Medical Supplies Market Share, 2015317

2 Selected Acquisitions & Divestitures325

3 Selected Cooperative Agreements.....328

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A rise in patient activity caused by an aging population, increasing incidence of medical conditions, and extension of health insurance coverage by government programs will promote gains.

US demand to rise 4.2% annually through 2020

Demand for disposable medical supplies in the US is forecast to expand 4.2 percent annually to \$54.1 billion in 2020. A rise in patient activity caused by aging population patterns, an increasing incidence of medical conditions, and the extension of health insurance coverage by government programs will promote gains. An elevated focus on infection prevention throughout the healthcare community will also boost demand. Nevertheless, tightening cost containment strategies by public and private health insurance concerns will remain a moderating influence on growth in the US disposable medical supplies market. Hospitals and other medical providers will become increasingly price-sensitive in purchasing products, as fixed and value-based reimbursement rates are applied to most patient procedures. Advances in technology will exert a mixed impact on overall demand. The introduction of new and upgraded products based on improved materials and designs will benefit growth. However, breakthroughs in minimally invasive and noninvasive techniques will reduce the need for disposable medical supplies in many patient procedures.

Drug delivery products to remain largest, fastest growing segment

Based on growth in the number of patients who need surgery or long-term

US Disposable Medical Supplies Demand, 2020 (\$54.1 billion)



Drug Delivery Products

Wound Management Products

Nonwoven Medical Disposables

Other Disposable Medical Supplies

therapy, drug delivery and related products will remain the largest and fastest expanding group of disposable medical supplies. Safety-enhanced devices for the minimally invasive delivery of parenteral medicines, inhalation therapies, and IV solutions will lead growth.

Among disposable wound management products, polymeric tissue sealants, along with alginate, foam, and collagen wound dressings, will realize the fastest gains based on enhanced safety and faster healing properties. On the other hand, demand for bandages will expand at a below average pace due to limited pricing flexibility and the overall lack of proprietary types. First aid kits will fare

the best among other disposable wound management products, benefiting from trends promoting self-treatment. Conversely, advances in less invasive surgery and tissue sealants will weaken the overall US market for traditional suture and staple wound closures.

Nonwoven medical disposables will see above average growth in demand. The heightened focus on infection prevention in the healthcare sector will boost consumption of single-use, high value-added nonwoven garments and textiles by hospitals and outpatient facilities. A rising prevalence of bladder control problems in an aging population will benefit retail and institutional sales of nonwoven incontinence goods.

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Sample Text, Table & Chart

NONWOVEN MEDICAL DISPOSABLES

Disposable Nonwoven Surgical Drapes

Demand for disposable nonwoven surgical drapes is expected to reach \$1.5 billion by 2025, an increase of 10 percent annually from 2015. The use of higher-quality textiles will underlie gains. By 2025, advances in barrier properties will lessen draping requirements in many settings.

**SAMPLE
TEXT**

Surgical drapes act as a barrier to minimize the transmission of pathogenic microorganisms between non-sterile and sterile areas in the operating room. A common surgical procedure employs several drapes to assure effective infection prevention. Two or more hand towel-sized sheets are normally positioned around incision or wound sites. Additionally, several larger drapes typically surround a large portion of the surgical table. In general, the number of drapes and the dimensions of the sterile field required increase with the complexity and invasiveness of the surgical procedure.

Surgical drapes are divided into four classes based on barrier protection criteria set by the Association for the Advancement of Medical Instrumentation (AAMI). Barrier protection is measured by the degree to which the textile resists the penetration of blood and other bodily fluids. Level 1 drapes meet the minimum standards for resistance, while Level 4 textiles provide the strongest resistance.

In addition to barrier protection, surgical drapes are subject to guidelines established by the Association of Operating Room Nurses (AORN) and other medical groups for tear, linting, and compressive strength, as well as patient and staff comfort. Tear and linting are important because loosened textiles can provide a vehicle for transmitting pathogens. Due to the presence of heat sources, oxygenated compounds, surgical suites are vulnerable to potential fire break-

198

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TABLE VI-15

BIOLOGICAL & SYNTHETIC WOUND DRESSING DEMAND BY TYPE (million dollars)

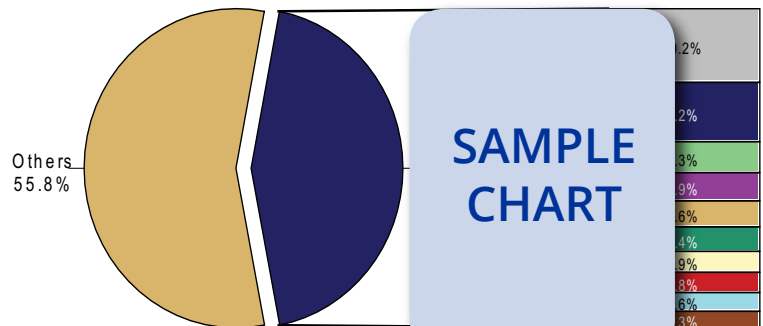
| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|--|------|------|------|------|------|
| Number of Injuries (million) | | | | | |
| \$ biological & synthetic dressings/injury | | | | | |
| Biological & Synthetic Wound Dressings | | | | | |
| Film | | | | | |
| Hydrocolloids | | | | | |
| Collagen | | | | | |
| Foam | | | | | |
| Hydrogels | | | | | |
| Alginates | | | | | |
| Other | | | | | |
| % biological & synthetic dressings | | | | | |
| Wound Dressing Demand | | | | | |

**SAMPLE
TABLE**

Source: The Freedonia Group

CHART X-1

DISPOSABLE MEDICAL SUPPLIES MARKET SHARE, 2015 (\$44.1 billion)



**SAMPLE
CHART**

Sample Profile & Table, & Study Coverage

TABLE V-1
DISPOSABLE DRUG DELIVERY PRODUCT DEMAND
 (million dollars)

| Item | 2005 | 2010 | 2015 | 2020 | 2025 |
|---|------|------|------|------|------|
| Chronic Conditions (million) \$ drug delivery products/condition | | | | | |
| Drug Delivery Product Demand | | | | | |
| Infusion Products | | | | | |
| Hypodermic Products | | | | | |
| Inhalation Products | | | | | |
| Dialysis Disposables | | | | | |
| Transdermal Patches | | | | | |
| % drug delivery products | | | | | |
| Disposable Medical Supplies Demand | 28 | | | | |

Source: The Freedonia Group

SAMPLE PROFILE

SAMPLE TABLE

STUDY COVERAGE

This Freedonia study, *Disposable Medical Supplies*, offers historical demand data (2005, 2010, 2015) plus forecasts (2020, 2025) by raw material, product type and market. The study also considers key market environment factors, assesses the industry structure, analyzes company market share and profiles 27 competitors in the US industry.

COMPANY PROFILES

Unilife Corporation

250 Cross Farm Lane
 York, PA 17406
 717-384-3400
 www.unilife.com

Revenues: \$
 US Revenues
 Employment

Key Products: auto-injectors; wearable injectors; and drug reconstitution, insulin, ocular, and other delivery systems engineered to provide targeted administration of injectable therapies.

Unilife Corporation is a manufacturer of advanced drug delivery systems for the administration of injectable drugs and vaccines across a range of therapeutic classes. The Company's products are sold to pharmaceutical and biotechnology companies for use as drug-device combination products, as well as directly to healthcare providers or patients who self-administer prescription medication.

Unilife participates in the US disposable medical supplies industry via the development, manufacture, and marketing of injectable drug delivery systems, which can be used to administer therapies tailored to treat a range of acute and chronic diseases. For example, the Company manufactures such single-use drug delivery systems as prefilled syringes; auto-injectors; wearable injectors; and drug reconstitution, insulin, ocular, and other delivery systems engineered to provide targeted administration of injectable therapies.

Prefillable Syringes -- Prefillable syringes from Unilife consist of UNIFILL products that employ the Company's proprietary automatic retraction safety mechanism, which is fully integrated within the barrel

Related Studies

Infection Prevention Products & Services

This study analyzes the US infection prevention industry. It presents historical data (2005, 2010, and 2015) and forecasts (2020 and 2025) by type (e.g., protective apparel and textiles, safety enhanced medical devices, sterilization supplies and equipment, disinfectants, infectious waste disposal supplies and services, contract sterilization services) and market (e.g., hospitals, outpatient facilities, physicians' offices, dental offices, nursing homes). The study also considers market environment factors, evaluates company market share and profiles industry players. **#3403.....April 2016.....\$5400**

Medical Adhesives & Sealants

This study analyzes the US medical adhesives and sealants industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by product (e.g., acrylic, cyanoacrylate, silicone, polyethylene glycol, fibrin, collagen, albumin), application (medical, dental) and market (primary care, dental offices, consumer). The study also considers market environment factors, details industry structure, evaluates company market share, and profiles industry competitors. **#3355..... March 2016.....\$5200**

Dental Products & Materials

US demand for dental products and materials will rise 3.4 percent yearly to \$12.7 billion in 2019. Cosmetic and repair/restorative products will be the fastest growing professional products. Among consumer products, value-added formulations will drive the dominant toothpaste segment. Polymers, ceramics and minerals will lead gains in dental materials. This study analyzes the \$10.7 billion US dental product and material industry, with forecasts for 2019 and 2024 by product and raw material. The study also evaluates company market share and profiles industry competitors. **#3359.....January 2016.....\$5200**

Drug Delivery Products

Demand for drug delivery products in the US will rise 6.1 percent yearly to \$251 billion in 2019. Parenteral products will grow the fastest, driven by monoclonal antibodies and polymer-encapsulated medicines. Hormones and central nervous system agents will lead gains by application. Pen injectors and retractable prefilled syringes will pace devices. This study analyzes the \$187 billion US drug delivery system industry, with forecasts for 2019 and 2024 by product and application. The study also evaluates company market share and profiles industry players. **#3354..... December 2015.....\$5300**

World Medical Disposables

Global demand for medical disposables is forecast to rise 6.6 percent annually to \$245 billion in 2018. The Asia/Pacific region will remain the largest and fastest growing market. Products used to treat widely prevalent chronic conditions such as kidney failure, urinary incontinence and arthritis-related pain will grow the fastest. This study analyzes the \$178 billion world disposable medical supply industry, with forecasts for 2018 and 2023 by product, world region, and for 16 countries. The study also evaluates company market share and profiles industry competitors. **#3205..... September 2014.....\$6400**

About The Freedonia Group

The Freedonia Group 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 and other world markets. Industries analyzed by Freedonia include:

- Automotive & Transport • Chemicals • Construction & Building Products • Consumer Goods • Energy & Petroleum • Industrial Components • Healthcare & Life Sciences • Machinery & Equipment • Metals, Minerals & Glass • Packaging • Plastics & Other Polymers • Security • Services • Textiles & Nonwovens • Water Treatment

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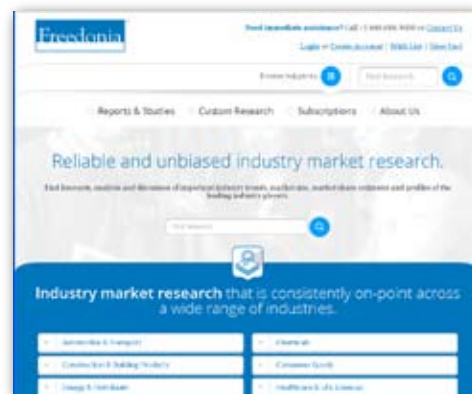
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