INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

World Medical Disposables

US Industry Study with Forecasts for 2020 & 2025

Study #3446 | August 2016 | $6500

A number of interrelated trends will foster growth in the world market for medical disposables. Aging population patterns will boost product demand by leading to a rising level of diseases and disorders and an expanding volume of patient activity. In addition, growth will benefit from the strengthening of infection prevention safeguards in healthcare facilities and by the introduction of new and upgraded products with enhanced performance and safety features.

Cost containment efforts affect medical disposables demand

Healthcare cost containment measures in the form of fixed global budgets and fixed reimbursement rates will keep hospitals and other medical providers frugal in their product purchasing practices. As the result of multiple supplier availability, most types of medical disposables will continue to derive a high percentage of sales from competitive bidding processes implemented by healthcare purchasing groups.

Copayments, coverage restrictions to provide a mixed impact

Health insurance concerns have raised patient copayments and restricted coverage for various medical services; this will exert a mixed impact on the world medical disposables market. By discouraging individuals from making unnecessary visits to physicians and other medical providers, these actions will moderate market growth. However, at the same time, rising copayments and coverage restrictions will boost sales of medical disposables in consumer and home healthcare markets.

Wide array of applications

Medical disposables serve all aspects of patient care, spanning thousands of products sold to several healthcare market segments. Major uses extend to surgery, drug and fluid delivery, wound management, diagnostic testing, patient examination, incontinence management, dialysis treatment, sterilization, infectious waste disposal, and general patient support.

Product groups

The various types of medical disposables are categorized into 11 principal product groups -- surgical instruments and supplies, infusion and hypodermic devices, diagnostic and laboratory disposables, sterilization supplies, dialysis disposables, bandages and wound dressings, nonwoven medical disposables, respiratory devices, patient room supplies, medical and laboratory gloves, incontinence goods -- and eight additional product lines -- first aid kits, urinary catheters and accessories, transdermal patches, ostomy supplies, medical sponges, medical waste disposal supplies, medical cotton goods, and enema supplies.

Study coverage

This study examines the medical disposables market worldwide. It presents healthcare indicators and historical data (2005, 2010, 2015) plus forecasts for 2020 and 2025 by product group in 6 regions and 16 countries. In addition, the study assesses key market environment factors, examines the industry structure and evaluates company market share.

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Industry study with historical data for 2005, 2010 & 2015 plus forecasts for 2020 & 2025

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CONTENTS SUMMARY

TABLES SUMMARY

Tables for each region & country include:
- Healthcare Indicators
- Medical Disposables Demand

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ASIA/PACIFIC

China: Medical Disposables Demand

Total demand for medical disposables in China is projected to
expand … billion in 202
Gradual … t and outpatie
services … mote gains. T
country … rates will con
to rise a … ies in catastrop
and gen … iate the deliver
medical … erations for m
doctors. … f outpatient fac
ties and … ust usually go
hospital

Due to the limited availability of surgery and other advanced … pies as well as continuing imbalances in the distribution of healthc… resources, China's per capita consumption of medical disposables … remain below the global average for several years. Moreover, dem… will remain concentrated in commodity goods as the majority of p… dures employed by medical providers involve basic examinations. … high propensity of individuals to self-treat injuries will keep a larg… of China's disposable medical product sales in basic bandages, dre… and other first aid supplies. The country's demand for higher valu… added products, such as bioengineered tissue sealants, foam and alginate wound dressings, prefilled syringes and inhalers, and angioplasty catheters, will remain small due to a comparatively low surgical rate.

Small- to medium-sized domestic producers of commodity-based supplies and devices dominate the supply of medical disposables in China. Multinational suppliers with manufacturing sites in the country include Ahlstrom, B. Braun Melsungen, Baxter International, Becto… Dickinson, Coloplast, Derma Sciences, Ethicon (Johnson & Johnso…

TABLE VI-6

CHINA: MEDICAL DISPOSABLES DEMAND
(million dollars)

Item	2005	2010	2015	2020	2025
Medical Disposables Demand					
Surgical Instruments & Supplies					
Infusion & Hypodermic Devices					
Diagnostic & Laboratory Disposables					
Bandages & Wound Dressings					
Nonwoven Medical Disposables					
Sterilization Supplies					
Respiratory Devices					
Incontinence Goods					
Dialysis Disposables					
Medical & Laboratory Gloves					
Other Medical Disposables					
% China					
Asia/Pacific Medical Disposables					

Source: The Freedonia Group

TABLE III-10

DISPOSABLE BANDAGES & WOUND DRESSINGS
DEMAND BY PRODUCT GROUP
(million dollars)

Item	2005	2010	2015	2020	2025
World Population (million)					
$ bandages & wound dressings/capita					
World Bandages & Wound Dressings					
Bandages:					
Adhesive Bandages & Tapes					
Other Disposable Bandages					
Wound Dressings:					
Biological & Synthetic Dressings					
Non-Adherent Dressings					
% bandages & wound dressings					
World Medical Disposables Demand					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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Related Studies

Infection Prevention Products & Services

US demand for infection prevention products and services will rise 4.9 percent annually to $27.6 billion in 2020. Medical waste disposal supplies and safety-enhanced medical devices will be the fastest growing products. Infection prevention services such as infectious waste disposal and contract sterilization will outpace supplies and equipment. This study analyzes US demand for infection prevention products and services, with forecasts for 2020 and 2025 by product, service, and market. The study also evaluates market share and profiles industry players.

#3403..................April 2016.................. $5400

Disposable Medical Supplies

US demand for disposable medical supplies will rise 4.2 percent annually to $54.1 billion in 2020. Drug delivery products will remain the largest and fastest growing type, led by safety-enhanced devices for minimally invasive delivery of parenteral and inhalation medicines, and IV solutions. Home healthcare will remain the fastest growing market. This study analyzes the $44.1 billion US disposable medical supply industry, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry players.

#3378............. February 2016 .... $5500

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 prefillable 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

Medical Imaging Products

US demand for medical imaging products will rise 5.8 percent yearly to $31.9 billion in 2019. Computed tomography (CT) and magnetic resonance imaging (MRI) products will lead gains, followed by nuclear medicine products. Good prospects also exist for picture archiving and communications systems (PACS) as patient data networks are upgraded. This study analyzes the $24.1 billion US medical imaging industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry participants.

#3315............September 2015............. $5300

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Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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:

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