# U.S. Demand for Disposable Medical Supplies to Reach $49.3 Billion

The Freedonia Group

U.S. demand for disposable medical supplies will expand 4.1 percent annually to $49.3 billion in 2018. According to Freedonia analyst Bill Martineau, “An increasing volume of patient activity attributable to an aging population, a rising incidence of medical conditions, and the extension of health insurance coverage by the Affordable Care Act of 2010 will comprise the major factors spurring growth.” The U.S. disposable medical supplies market will also benefit from a heightened focus on infection prevention throughout the health care sector. These and other trends are presented in Disposable Medical Supplies, a new study from The Freedonia Group, Inc., a Cleveland-based industry market research firm.

Based on an increasing number of patients who need surgery or long-term chronic care therapy, drug delivery and related products will remain the fastest expanding group of disposable medical supplies. Total demand registered by this product group will rise 5.1 percent annually to $13.4 billion in 2018. Safety-enhanced devices for the minimally invasive delivery of parenteral medicines, inhalation therapies, and IV and dialysis solutions will lead growth.

Disposable wound management products will post demand of $11.2 billion in 2018, up 3.8 percent annually from 2013. Polymeric tissue sealants, along with alginate, foam, and collagen wound dressings, will realize the fastest growth based on enhanced safety and faster healing properties. Conversely, 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.

Compared to disposable medical supplies as a whole, nonwoven medical disposables will see above average growth in demand. The heightened focus on infection prevention in the health care sector will boost consumption of single use, high value-added nonwoven garments and textiles by hospitals and outpatient facilities. A rising prevalence of incontinence problems attributable to the aging population will impact favorably on retail and institutional sales of nonwoven adult undergarments, shields, and other protective products.

**US DISPOSABLE MEDICAL SUPPLIES DEMAND**
**(million dollars)**

| Item | 2008 | 2013 | 2018 | % Annual Growth 2008-2013 | % Annual Growth 2013-2018 |
|---|---|---|---|---|---|
| Disposable Medical Supplies Demand | 32790 | 40300 | 49300 | 4.2 | 4.1 |
| Drug Delivery & Related Products | 7990 | 10450 | 13400 | 5.5 | 5.1 |
| Wound Management Products | 7740 | 9290 | 11200 | 3.7 | 3.8 |
| Nonwoven Medical Disposables | 4410 | 5590 | 7000 | 4.9 | 4.6 |
| Other Disposable Medical Supplies | 12650 | 14970 | 17700 | 3.4 | 3.4 |

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