

Markets
Products
Technologies
Innovations
Chances & risks
Competition
Prospects to 2015

Study:

World Medical Devices Market



September 2007

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Sample Reading

2.3 World market of medical devices by regions 2004-2015

Medical devices market is geographically very unevenly laid out. US is the biggest single market, which alone accounts for nearly 40% of the total market, followed by Japan which has a market size of \$26.64 billion and Germany with a total revenue of \$21 billion in 2006. The rest of the world shares 35% of the \$209 billion market. These three countries are not only the main consumers of medical devices, but also the leading producers and exporters of high-quality and high-tech medical instruments and equipments. For instance, imaging equipment market is highly dominated by several multinational companies headquartered in US, West Europe and Japan, such as GE, Siemens, Philips and Toshiba.

Most high-tech medical equipments in Latin America, Africa and other Asia countries are imported from US, Japan and West Europe, due to lack of technology advances and innovation in these regions. In some small developing countries, over 90% of medical supply is dependant on import. According to present technical level, such trend will last a decade, if not aggravate.

Figure 10: World market of medical devices 2004-2015 by regions US\$ Bn

	2004	2006	2008	2010	2015
N. America (NAFTA)	83.14	93.97	105.88	118.23	164.63
W. Europe	52.50	59.04	65.65	73.11	103.00
Japan	24.14	26.64	29.31	32.65	44.76
Asia/Pacific (excl. Japan)	15.72	18.36	23.13	30.20	54.97
S. America	3.48	3.94	4.83	6.11	11.18
E. Europe	3.98	4.50	5.96	7.73	14.90
Africa	2.49	2.82	3.41	4.13	7.79
Total	185.45	209.27	238.17	272.16	401.23

(Vol.I, P.34)

3.4.3 Market drivers and restrains

Market drivers

- **Material technology**

Biomaterial technology has achieved great development in recent years and been widely applied to medical science, e.g. bone and joint substitutes, soft tissue repair and replacement, viscoelastics, tissue engineering, and etc.

- **Design considerations**

The advancement in computer science enables increasing use of computer-aided design and computer-aided manufacturing, which result in increased compatibility of orthopaedic products to human body. Such innovative design also makes it more convenient for the surgeons to carry out orthopaedic repair and replacement and lead to higher success rate.

- **New technology and products reduce age threshold for orthopaedic reconstruction**

New technologies significantly improve the compatibility of orthopaedic devices and safety of orthopaedic surgeries and reduce age threshold for orthopaedic reconstruction. The customer range is thus widened.

- **Lifestyle trends**

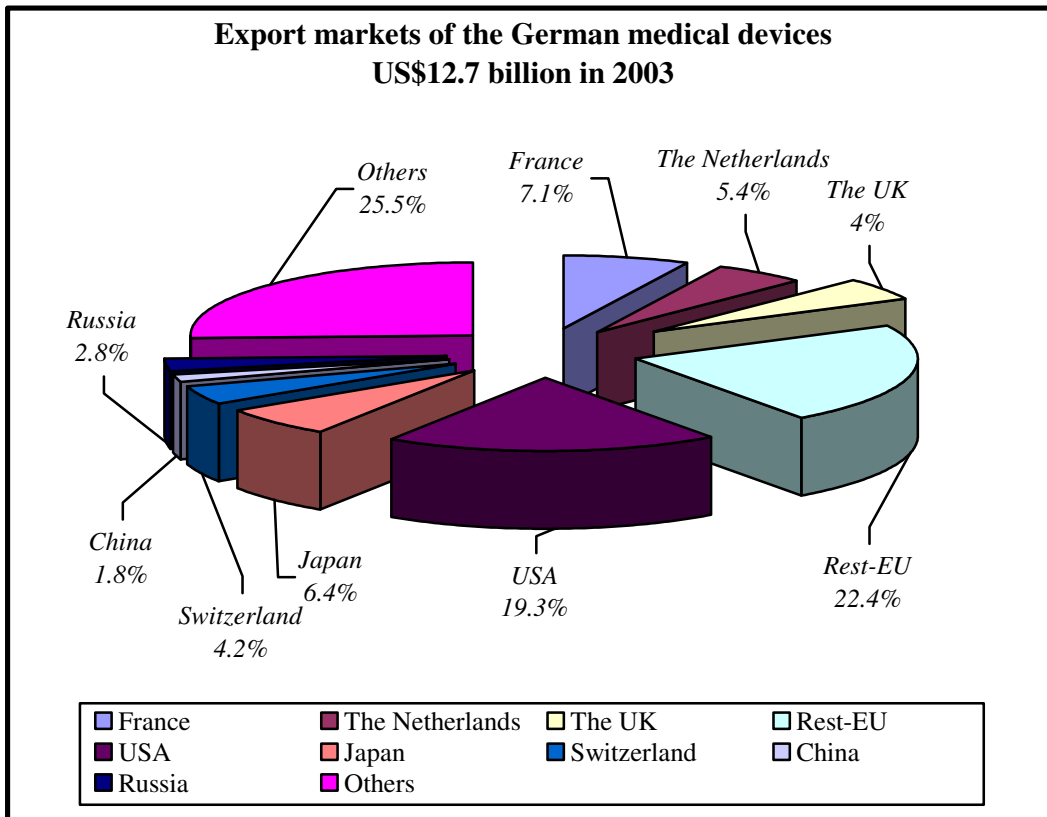
Increased incidences of injuries result from changed lifestyle. Out-door activities and sports are becoming important causes for body injuries and the demand on orthopaedic surgeries.

- **New product development**

Due to technology advancements, new products are developed to treat orthopaedic disorders more efficiently or to treat the disorders which are rarely curable before.

(Vol. I, P.93)

Export markets of the German medical devices



Source: Statistische Bundesamt

Import

On the other hand, Germany spends a lot of money annually in importing implantable devices, dental instruments and supplies, hearing aids devices, and some low-tech products. The main country importers are the United States, EU members, and Japan. The United States alone accounts for 30% of Germany's imported medical device market, far ahead of any single EU-member and Japan.

(Vol.I, P.207)

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SE-402 52 Göteborg

Sweden

Phone: +46 31 722 30 00

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<http://www.molnlycke.com>

Year of foundation: 1998

Revenue 2006: \$ 925.29 million

Number of employees: 5,500

Company profile

Mölnlycke Health Care is one of the world's leading providers of single-use surgical and wound care products and services to the healthcare sector.

Mölnlycke's business is divided into two divisions: Surgical Division and Wound Care Division.

The Surgical Division offers single-use surgical products such as drapes, packs and staff clothing, customised procedure trays, surgical powder free gloves and skin antiseptics. The products are marketed under the brand BARRIER®, Biogel®, HibiAntiseptics™ and ProcedurePak®.

The Wound Care division provides wound healing products and skin care.

The company has manufacturing facilities in Belgium, Czech Republic, Finland, Malaysia, Thailand, and the UK. Its products are marketed through direct sales with eighteen offices across Europe, the Middle-East and Africa, two offices in North America, and four offices in the Asia Pacific region.

(Vol.II, P. 236)

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