

The Global Market for Medical Devices, 4th Edition

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Abstracts

Medical device makers faced challenging year in 2012. New taxes in the United States, financial tightening and regulatory threats in Europe. They consolidated, launched new devices and invested in R&D in response. In this report, The Global Market for Medical Devices, 4th. Edition, Kalorama Information analyzes the current device market in the United States, Europe, Asia and globally, profiles the key players and discusses trends important for market watchers to know.

The medical device market is vast -- everything from a large imaging system to a disposable item can be classified as a type of medical device -- but also provides opportunity for new entrants. While in dollar terms the pharmaceutical market is greater, the device market has more participants and is responsible for more orders and transactions. Throughout the past decade, Kalorama Information has covered many device markets in detail. Certain areas such as infusion pumps, patient monitoring and catheters have shown promising growth. Others have solid market leaders earning stable revenue.

What are the fastest-growing categories for medical devices? How have taxes in the United States, which the industry started paying in 2013, affect company results and strategy? How is the European financial troubles affecting the industry? What competitive moves did they make in 2012? How have device companies fared in a weaker-than-expected recovery? What impact will US healthcare reform and its new taxes have on the industry in the largest medical device market?

This Kalorama Information report answers these questions and examines the global medical device industry and the key competitors participating in it. Combining the expert knowledge of Kalorama Information's reporting on device markets and analysis of 2010 results, the report provides insights into current trends that will be of interest to anyone watching the medical device market. As part of its coverage, the report includes:

Current Medical Device Market Size Estimate

Forecast to 2017

Regional Breakout of Device Market (US, Europe, Asia, Rest of World)

Medical Device Market in Significant Countries (US, China, Germany, Italy, France, Brazil, Japan)

US Medical Device Excise Tax Impact

A Detailed Look at GPOs

2012 Acquisitions and Mergers

Discussion of Hospital Spending, Population and other Trends

Revenues of Top Device Companies, 2011

A Look at Key Device Category Segments (GI Equipment, MRI, Ultrasound, Patient Monitoring, Catheters, Imaging Equipment, Stents, Respiratory Equipment, Pacemakers and Other Areas)

Profiles of Top Medical Device Companies

Analyst's Conclusions Concerning the Current Device Market

The report discusses the regulatory process and proposed changes in major markets, as well as the trends in the industry that are apparent in 2012. It also takes a detailed look at results from 12 'bellwether' companies (chosen for revenues and diversity of product offerings) to glean insights about the larger market from their results in the past year. As part of its coverage of the medical device market, Kalorama profiles some of the top companies in the industry, including:

Johnson & Johnson

GE Healthcare

Stryker

Medtronic

Cook Medical

Smith & Nephew

Olympus

Biomet

Siemens Healthcare

Toshiba Medical Systems

CareFusion

Mindray

Haemonetics

Baxter International

Perkin Elmer

Nobel Biocare

Philips Healthcare

Covidien

Abbott Laboratories

Becton Dickinson

B. Braun

St. Jude Medical

3M Healthcare

Zimmer

Hospira

Danaher

Terumo

Fresenius Medical

Owens & Minor

Thermo Fisher Scientific Inc

Smiths Medical

Boston Scientific

Roche

CR Bard

Dentsply

Hill-Rom

Coloplast

Teleflex

Kalorama Information has, in many of the largest device markets, conducted detailed primary and secondary research-based studies and has examined manufacturer revenue estimates, rendering the total market visible. In addition to a review of company annual financial reporting, this report was partially assembled using data from Kalorama Information's previous medical device reports. As is the standard methodology with all

Kalorama market research reports, both primary and secondary research was used. Research into company annual reports, trade publications, government and medical literature was used as a foundation. Interviews with executives at medical device companies were conducted and are the key source of estimates.

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Mindray Medical International Ltd
Hill-Rom
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Smith & Nephew

Hospira
Danaher
Terumo Corporation
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About

Back in 2004, the small boom in hospital mergers began to slow down, and economic growth boosted the country overall. This led to a situation where the number of hospitals deciding to join up with each other dropped dramatically. To appreciate the scale of this change, it is worth while noting that over 200 hospital merger transactions occurred in 1996. By the time 2004 appeared, this figure had dropped to under 50. This heady level of fluctuation meant that some hospitals saw more danger a head, but for a while everything was quieter on the merger front.

The number of hospital mergers is increasing. While this, at first sight, may seem like a sign that things are becoming difficult again for hospitals, it could also mean that merged hospitals have increased buying power, which can only lead to better outcomes for patients, as they buy in newer equipment and processes that add value to the patient experience overall. So this means that, while the number of mergers is certainly not decreasing, it is not entirely a bad thing from the patient's point of view. In addition, any company that supplies equipment to hospitals may now find, for example, that there is more money flying around as hospitals that are literally bigger find their needs becoming more complex.

Hospitals are having trouble collecting payments for the care that they provide.

This is nothing new and it does not seem to be getting any better. However, it is not all gloom and doom, with some hospitals stepping up to the challenge and trying their best to think creatively about how they can secure payments from patients and insurers.

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