# EUROPEAN SPECIALTY MEDICAL PACKAGING MARKET OUTLOOK 2008

Market Overview and Opportunities for Medical Packaging Companies and Suppliers







### **AWA Alexander Watson Associates**

Koningin Wilhelminaplein 13 2.09.09 (Tower 2, Floor 9, Suite 9) PO Box 69035 1060 CA Amsterdam The Netherlands

Tel: +31 20 676 2069 Fax: +31 20 676 2375 Email: reports@awa-bv.com Web: www.awa-bv.com

### **AWA North American Office**

910 N Lakeshore Drive #2415 Chicago, IL 60611 USA

Tel: +1 312 943 4091 Email: reports@awa-bv.com Web: www.awa-bv.com

# **European Specialty Medical Packaging Market Outlook 2008**

AWA Alexander Watson Associates has published in-depth reports on the European market for medical packaging since 1982, tracking material trends and the changing market structure.

The European medical packaging market continues to grow. The need for disposable medical devices, sterilizable packaging, barrier packaging and other medical/surgical products, is increasing. With increased performance requirements, medical packaging converters and material suppliers are faced with challenges to provide products to satisfy these needs.

**European Specialty Medical Packaging Market Outlook 2008** uniquely provides a tool for evaluating the market, highlighting opportunities and supporting strategic decision-making. It offers a perspective for the industry broken down by product, material and market segmentation; exclusive value chain analysis by key areas, and a review of technology developments and new application opportunities. It provides in-depth views from medical device manufacturers about their uses and needs for their primary packaging.

Its focus is on primary packaging, and direct packaging such as blood and intravenous solutions bags are not investigated, although mentioned. All materials used for sterilization, and the relative sterilization techniques, are reviewed as used across the value chain, and finally utilized with doctors and in hospitals. It also features company profiles on raw material suppliers and individual medical packaging companies across the value chain.

Research for this study is based primarily on interviews across the value chain, concentrating on types of materials, packaging formats and specifically on medical device manufacturers' views and expectations. Support information has been acquired using publicized information from various sources.

### **AVAILABILITY AND SUBSCRIPTION PRICE**

**European Specialty Medical Packaging Market Outlook 2008** has been published in December 2008.

The price of a hard copy is €3,800. Additional hard copies are available at €200 each.

It is also possible to order this report as a pdf, to be provided by email, for a price of  $\in$ 3,800. A hard copy and a pdf can be ordered together for the combination price of  $\in$ 4,000.

There is a  $\in$ 60 charge for handling and processing. If express or overnight delivery is required, this may be provided at cost.

### **AWA Alexander Watson Associates**

AWA is an international publishing and market research company whose specialization and expertise in the packaging market extends over many years and provides a unique database of marketing information. AWA also provides consultancy services and the possibility for tailored research.

### **AWA Conferences & Events**

AWA Conferences & Events was established to expand AWA's platform of expert services for the specialty paper, film, packaging, coating, and converting industry and regularly organizes events in these markets, which are particularly valued for the industry networking opportunities they provide, as well as for their in-depth content.

Visit the events section of our website for an overview of events.



## **Table of Contents**

1.	INTRODUCTION	6.4	Catheters/Stents	
1.1	Introduction	6.4.1	Pack Formats	
1.2	Definitions & Abbreviations	6.5	Sterile Fluids	
1.3	Methodology	6.5.1	Pack Formats	
1.4	Acknowledgements	6.6	Drapes and Gowns	
	, telli lo med gements		Pack Formats	
2.	<b>EXECUTIVE SUMMARY</b>	6.7	Procedure Packs (Kits)	
			Pack Formats	
3.	MEDICAL PACKAGING MARKET	6.8	Gloves	
<b>J.</b>	STRUCTURE AND VALUE CHAIN	6.9	Orthopedic and Cardiovascular Implants	
3.1	Specialty Medical Packaging Market	6.10		
٥.١	Structure	6.10		
3.2	Value Chain	0.11	Other Single-use Medical Devices	
J.Z	value Chain	7.	MATERIALS	
4	EUROPEAN SPECIALTY MEDICAL	7. 7.1	Materials	
4.	PACKAGING MARKET		Materials – Forecast Growth Rates	
11		7.2		
4.1	European Specialty Medical Packaging	7.3	Paper	
4.2	Market	7.4	Plastics and Film	
4.2	Specialty Medical Packaging Materials	7.5	Nonwovens	
4.3	Specialty Medical Packaging Formats	7.6	Tyvek®	
4.4	Specialty Medical Packaging End-use	7.7	Aluminum Foils	
	Segments	7.8	Prices	
5.	MEDICAL PACKAGING	8.	HOSPITALS	
5.1	Medical Packaging	8.1	Single-use and Multi-use	
5.2	Pack Formats	8.2	Supply of Specialty Medical Packaging	
5.2.1	Wrappings, Bags, and Miscellaneous		11,7 1 , 3 3	
	Packaging	9.	REGULATION AND LEGISLATION	
5.2.1.1	Wrappings/Wraps	9.1	Medical Device and Packaging Directives	
5.2.1.2		9.2	Environmental Legislation, Recyclability, Re-	
5.2.2			use	
5.2.3	Flexible Rollstock			
5.2.4	Rigid Trays/Lids	10.	TRENDS AND OPPORTUNITIES	
5.3	Converters	10.1	Trends and Opportunities — General	
5.4	Packaging Machines	10.2	• •	
5.4.1	Thermoforming Machines	10.3	• •	
5.4.2	Sealing Machines	10.4	• •	
5.4.3	Pouch-making machines	10.5	·	
5.5	Sterilization Technologies	10.5	richas and opportunities Devices	
3.3	Stermzation recimologies	11.	COMPANY PROFILES	
6.	PACKAGNG FOR SINGLE-USE MEDICAL	11.1	Material Supplier Profiles	
<b>.</b>	PRODUCTS	11.2	• •	
6.1	Single-use Medical Products	11.3		
6.2	Dressings/Wound Care	11.4		
6.2.1	Packaging Materials	11.4		
6.2.2	Pack Formats	11.6	• • • • • • • • • • • • • • • • • • • •	
6.2.3	Developments	11.0	Sternization Directory	
6.3	•	APPENDICES		
6.3.1	Syringes Pack Formats	APP A1		
			World Population Data	
6.3.2	Developments	A2	GDP% Change per Region	

# **European Specialty Medical Packaging Market Outlook 2008**

# **SUBSCRIPTION ORDER FORM**

Please complete this form and fax it to AWA Alexander Watson Associates at +31 20 676 2375

	Please send m	e:				
	HARD COPY		€ 3,800	I am an SBA member		
	PDF VIA EMAIL	-	€ 3,800			
	BOTH HARD COPY AND PDF VIA EMAIL € 4,000					
	ADDITIONAL HARD COPIES AT		€ 200 EACH	€ 200 EACH		
		PROCESSING CHARGE ry is required this will be p	€ 60 rovided at cost)			
Name						
Job Title						
Company						
Address						
Postcode						
Country						
VAT # (EU only)						
Phone						
Fax						
Email						
Signature						
Date						
		Please send an invoice to Payment is enclosed Payment has been transfe Iban: NL 16 INGB 0664 032 Payment will be made by	ered to bank account n 29 23, Swift (BIC): INGB			
Card Number						
CVC Code						
Expiry Date						
Name of Cardholder						
Address of Cardholder						
Signature						