

Personal Protective Products in Healthcare Disposable Gloves Worldwide

A Market Strategy Report

Report Highlights

April 2007

Report Benefits

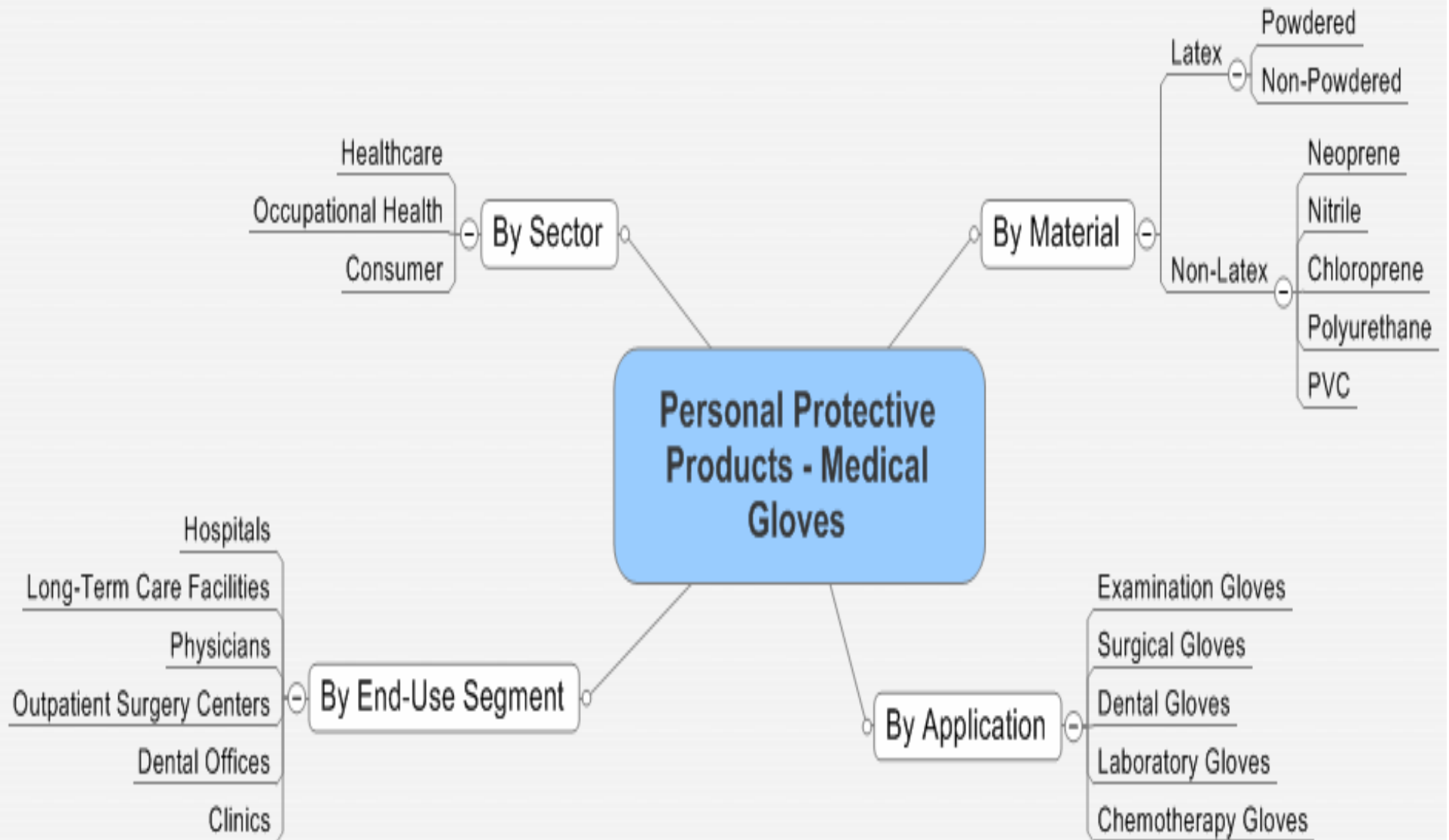
This report can help in:

- Assessing the market for Personal Protective Products (Medical Gloves), growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- The U.S. market for Medical Gloves is estimated to have touched \$1.1 billion 2006.
- Powder-free and synthetic gloves segments are growing and powdered latex gloves are declining.
- Key product innovations: barrier protection, double gloving, anti-microbial coating, emollient rich, puncture detection, allergy-free, and flexible gloves.
- Leading players in the medical gloves space: AHPC, Ansell, Cardinal Health, Medline Industries, Kimberly-Clark, Microflex, Mölnlycke, Sempermed, Top Glove, and others.

Disposable Gloves Universe



Key Market Trends

- Increasing emphasis on infection control and hygiene standards in healthcare delivery settings.
- Focus on developing glove materials which can improve fit and offer better barrier protection.
- Despite concerns related to allergies, healthcare organizations continuing use of latex gloves because of favorable price factors.
- Trend toward double gloving and puncture detection in surgical gloves.

Key Market Drivers

- Gloves are disposable, making it a recurring business that is relatively immune to economic cycles.
- Increasing health regulations to protect patients and health care workers.
- Growing and aging population
- Increasing awareness of allergies and diseases among both healthcare workers and patients – spurring demand for non-powdered and synthetic gloves.
- Emerging public health threats such as SARS, bird flu, bioterrorism, and chemical attacks.
- Economic expansion in Asia and Latin America.

Key Market Restraints

- Price pressures and budget constraints.
- Allergic reactions to powdered latex gloves.
- Increasing cost of product liability insurance for suppliers.
- Escalating cost of natural rubber latex until late last year (increase of over 120% in the 2005-2006 period).

Sample Data Table

USA - Latex Medical Gloves - Powdered vs. Powder-Free (Units, ASP/Pair, and Revenues) - 2005 - 2013

Segment	2005	2006	2007	2008	2009	2010	2011	2012	2013	CAGR
Powdered Latex Gloves										
Unit Sales (Million Pairs)										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Powder-Free Latex Gloves										
Unit Sales (Million Pairs)										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
Total Latex Gloves										
Unit Sales (Million Pairs)										
Unit Sales Growth										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										

Source: Marketstrat®

Includes Surgical and Exam Gloves

Regions Covered	USA, Latin America, Europe, Japan, Rest of Asia-Pacific (ROAPAC), Middle East & Africa
Product/Market Segments	By Application: Surgical Gloves; Exam Gloves By Material: Latex Gloves (Powdered, Powder-Free); Vinyl Gloves; Nitrile Gloves By Application & Material: Powder-Free Latex Exam; Powdered Latex Exam; Vinyl Exam; Nitrile Exam; Powder-Free Latex Surgical; Powdered Latex Surgical; Synthetic Surgical
Companies Profiled	~ 100 (worldwide)
Market Estimates/ Forecasts	In Units (millions of pairs) and US dollars for 2005-2013
MARKETSTRAT® Analytical Framework	Drivers and Restraints; Key Market Parameters (KeyMAP Grid), Market Share Ranking, Competitive Position Map, Competitive Segmentation
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Surgical Masks
N95 Respirators
Medical Gloves
Surgical Gowns

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