

Disposable Medical Gloves (Exam & Surgical) Markets Worldwide

Report Highlights

January 2010

Report Benefits

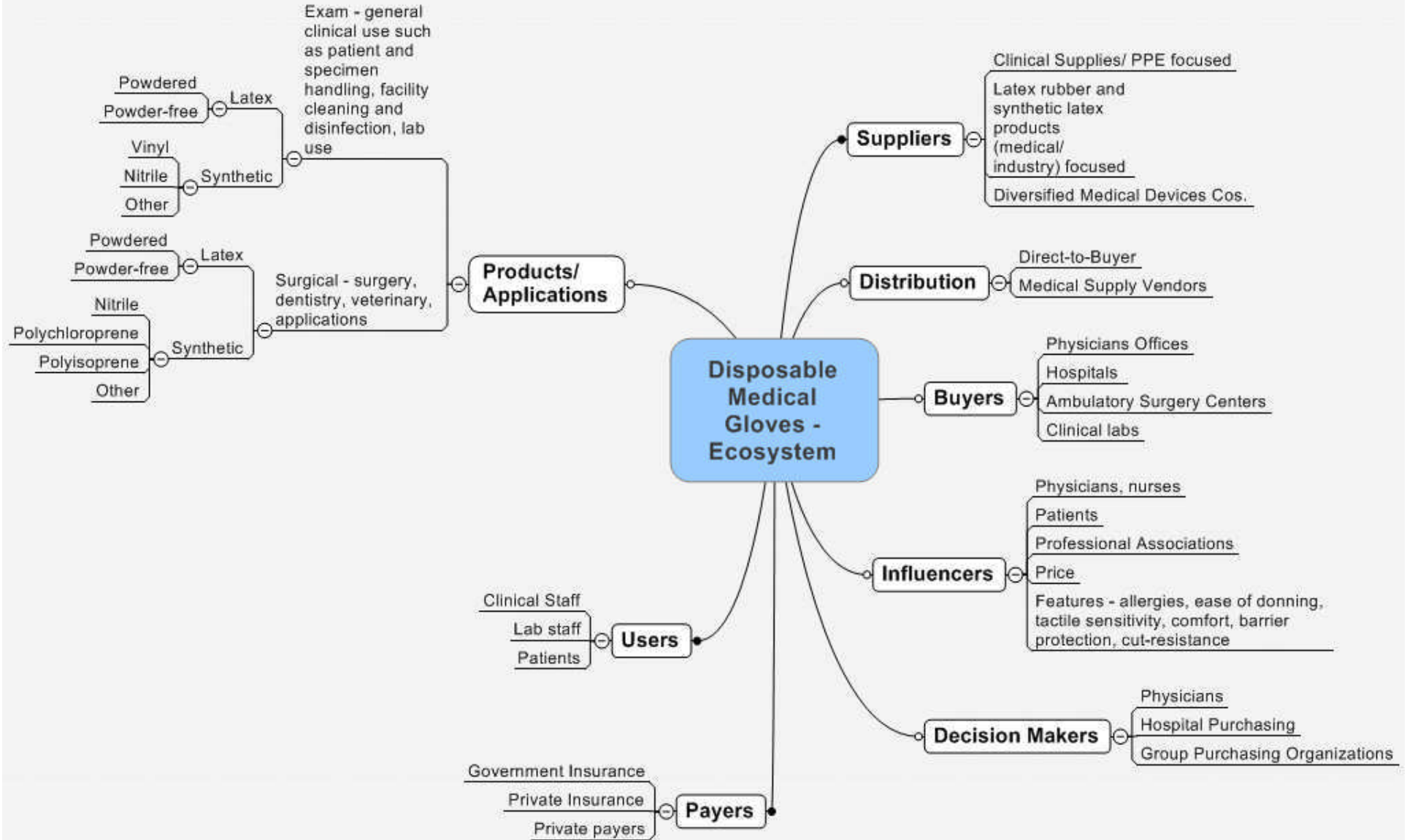
This report can help in:

- Assessing the market for Disposable Medical Gloves (Exam & Surgical Gloves) worldwide, 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 world market for disposable medical gloves is estimated to have reached close to \$2.86 billion by the end of 2009.**
- **Concern regarding barrier protection, ease of use, tactility and comfort will be key market and technology drivers.**
- **Leading manufacturers are shifting production towards powder-free, low-protein latex and synthetics to meet market demands.**
- **Recent price increases driven up by fuel and raw material costs will gradually decline; significant shifts are expected in the market as latex competes with nitrile.**
- **Demand for exam gloves has experienced unexpected hikes with recent epidemics including SARS and H1NI1.**

Disposable Medical Gloves Ecosystem



Drivers

- Latex allergies and allergies to glove powder are driving large scale users such as hospitals to restock their gloves supply with hypoallergenic gloves, despite higher upfront costs.
- Due to advances in material technology, superior glove materials are now available. New synthetics such as polychloroprene and polyisoprene closely resemble latex in fit and comfort, yet retain shape, reduce fatigue, and last longer.
- Growing healthcare needs and related expenditures of emerging economies of Asia and Latin America coupled with increased awareness of occupational hygiene and worker protection standards.
- Practice of double gloving is becoming more widespread.

Restraints

- Allergic reactions to glove powders, latex and some of the synthetic materials.
- Long-term contracts with manufacturers prevent end-users from switching brands too readily.
- Challenging operating environment for pure-play glove suppliers.
- Popularity of synthetic gloves is impacting the latex glove market.
- Consolidation of health care buyers into large GPOs, who prefer bundled pricing is leading to further pricing pressures and reduced pricing flexibility for suppliers.

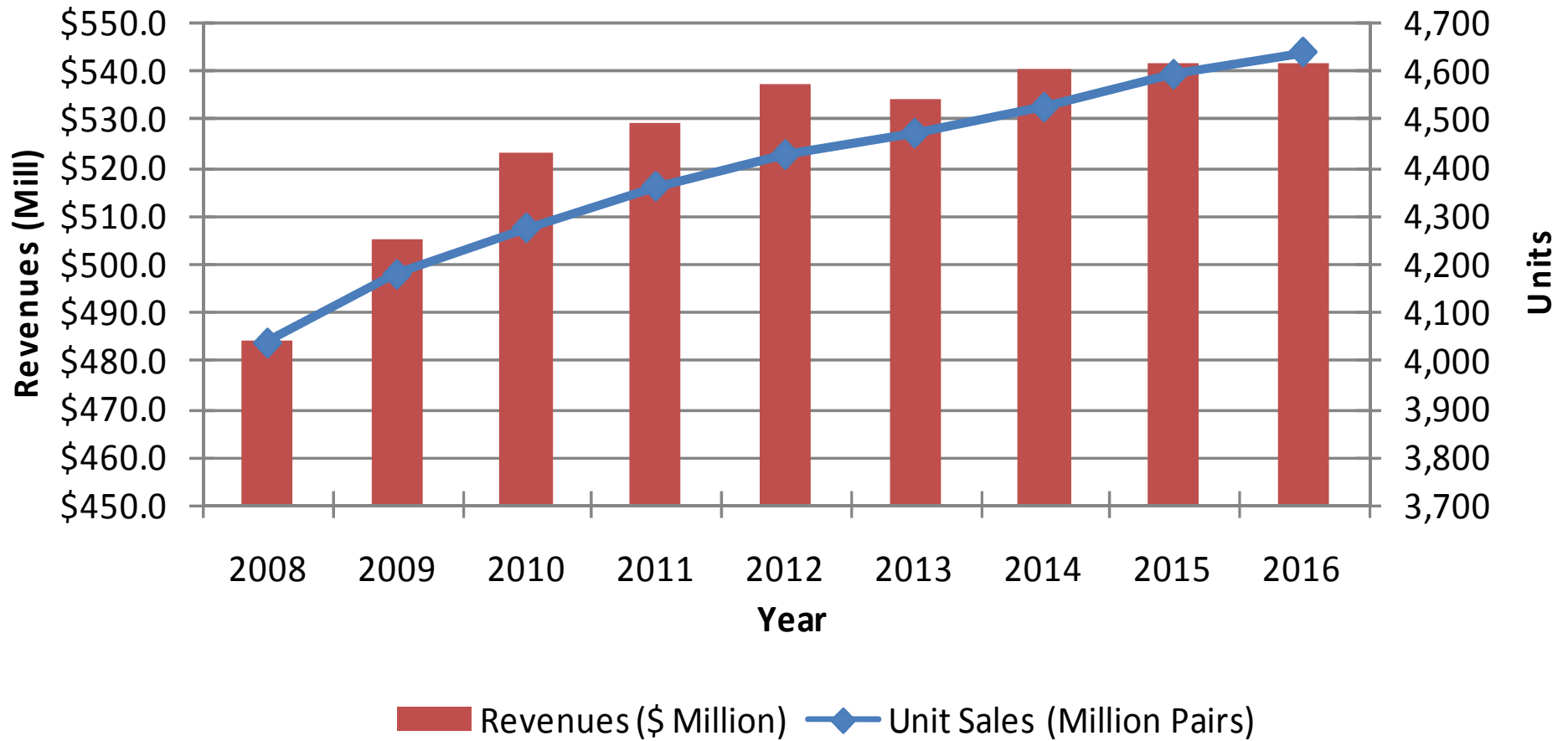
Sample Market Data Table

Total Market for Disposable Medical Non-Latex Gloves - United States (Units, ASP, and Revenues) - 2008-2016

Segment	2008	2009	2010	2011	2012	2013	2014	2015	2016	CAGR
Total Non-Latex Segment										
Unit Sales (Million Pairs)										
Unit Sales Growth										
% Share of Total Units										
Avg. Selling Price (ASP)										
Revenues (\$ Million)										
Revenue Growth										
% Share of Total Rev										
PVC										
% Share of Total Units										
% Share of Total Rev										
Nitrile										
% Share of Total Units										
% Share of Total Rev										
Synthetic										
% Share of Total Units										
% Share of Total Rev										

Source: Marketstrat®

Sample Chart



Regions Covered	US, Europe, Japan, Rest of the World (ROW)
Product/Market Segments	By Application and Material <ul style="list-style-type: none">• Exam Gloves<ul style="list-style-type: none">-Latex exam gloves (powdered)-Latex exam gloves (non-powdered)-Vinyl/PVC exam gloves-Nitrile exam gloves• Surgical Gloves<ul style="list-style-type: none">-Latex surgical gloves (powdered)-Latex surgical gloves (non-powdered)-Synthetic surgical gloves
Companies Profiled	98 companies worldwide
Market Estimates/Forecasts	In US dollars for 2008-2016
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