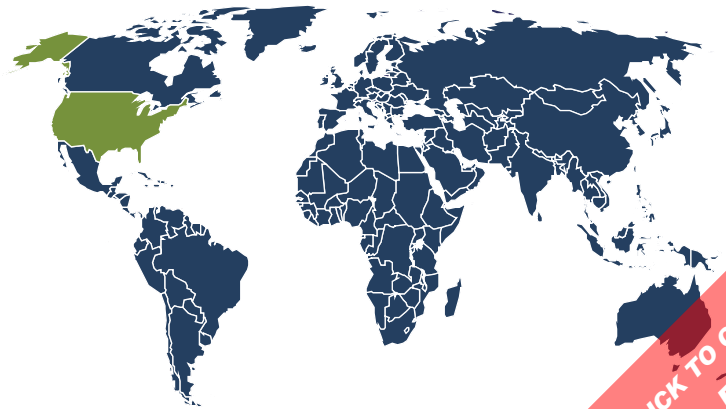


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# Medical Apparel & Textiles: United States

April 2016



## Highlights

### Market Environment

Historical Trends | Key Economic Indicators | Healthcare-Associated Infections  
Regulatory Factors

### Segmentation and Forecasts

Products | Markets

### Industry Structure

Industry Characteristics | Market Leaders

### Resources

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# About This Report

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## Scope & Method

This report forecasts US medical apparel and textile demand in US dollars at the manufacturers' level to 2020. Total demand is segmented by product in terms of:

- medical and laboratory gloves
- surgical drapes
- surgical gowns
- patient gowns
- surgical and staff face masks
- other products such as disposable staff apparel, disposable towels and bedding, and surgical headwear.

Total demand is also segmented by market as follows:

- hospitals
- outpatient facilities
- physicians' offices
- other markets such as dental offices, life sciences, and nursing homes.

To illustrate historical trends, total demand and the various segments are reported at five-year intervals for 2005, 2010, and 2015. Total demand for infection prevention products and services is provided in an annual series from 2005 to 2015.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Medical Apparel & Textiles: United States* (FF40072) is based on [Infection Prevention Products & Services](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | Industry Codes Related to Medical Apparel & Textiles

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
325612	Polish and Other Sanitation Good Mfg	2842	Specialty Cleaning, Polishing, and Sanitation Preparations
339113	Surgical Appliance & Supplies Mfg	3842	Orthopedic, Prosthetic & Surgical Appliances & Supplies
562112	Hazardous Waste Collection	4212	Local Trucking Without Storage

Source: US Census Bureau

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## Resources

### The Freedonia Group

*Infection Prevention Products & Services*, April 2016

### Freedonia Industry Studies

*Medical Implants in the US*, November 2016

*World Medical Disposables*, August 2016

*In Vitro Diagnostic (IVD) Packaging*, June 2016

*Disposable Medical Supplies*, February 2016

*Dental Products & Materials*, January 2016

*Drug Delivery Products*, December 2015

*Medical Imaging Products*, September 2015

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*Disposable Medical Supplies: United States*

*Healthcare Insurance: United States*

*Healthcare: United States*

*Infection Prevention Products & Services: United States*

*Medical Equipment & Supplies: United States*

*Medical Imaging Products: United States*

*Pharmaceuticals: United States*

*World Electronic Medical Records*

*World Medical Devices*

*World Medical Disposables*

*World Needle-Free Drug Delivery Systems*

*World Vaccines*

### Freedonia Custom Research

### Trade Publications

*American Journal of Infection Control*

*Drug Development & Delivery*

*FierceMedicalDevices*

*Infection Control Today*

*Medical Design Technology*

*Medical Device & Diagnostic Industry*

*Medical Product Manufacturing News*

*Pharmaceutical Technology*

*Qmed Daily*

### **Agencies & Associations**

Advanced Medical Technology Association  
Association for the Advancement of Medical Instrumentation  
Association of periOperative Registered Nurses  
The Joint Commission  
Occupational Safety and Health Administration  
United States Census Bureau  
United States Department of Health & Human Services  
Centers for Disease Control and Prevention  
United States Department of Transportation  
United States Environmental Protection Agency  
United States Food and Drug Administration  
United States International Trade Commission