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US Collection

Disposable Masks & Respirators: United States

May 2020



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About This Report

Scope

This report forecasts to 2020 and 2024 US disposable mask and respirator demand in units and nominal US dollars at the manufacturer level. Total demand by value is segmented by product in terms of:

- surgical masks
- respirators

Total demand by value is also segmented by market as follows:

- medical
- manufacturing and construction
- consumer and commercial

To illustrate historical trends, total demand by unit and value, and the various segments are provided in annual series from 2015 to 2019.

This report analyzes the market for disposable masks and respirators. Included within the scope of this report are:

- medical examination or procedure masks
- surgical masks
- personal masks (also known as courtesy masks)
- respirator masks certified to filter at least 94% of airborne particles, commonly known as N95, KN95, and FFP2 masks, among others (as well as oil-resistant versions of these)

For purposes of this report, the term “surgical masks” is used as a catch-all for all disposable masks other than respirators.

Excluded are all reusable masks, powered respirators, gas masks, face shields, textile masks, fashion masks, holiday masks, and homemade masks.

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

Sources

Disposable Masks & Respirators: United States (FF40093) is based on [Global Disposable Masks & Respirators: COVID-19 Impact Analysis](#), a comprehensive industry study published

About This Report

by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and 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 | NAICS & SIC Codes Related to Disposable Masks & Respirators

NAICS/SCIAN 2017 North American Industry Classification System		SIC Standard Industrial Classification	
339113	Surgical Appliance and Supplies Manufacturing	3842	Surgical Appliances and Supplies

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis,

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end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia 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.

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Resources

The Freedonia Group

Global Disposable Masks & Respirators: COVID-19 Impact Analysis

Freedonia Industry Studies

Disposable Medical Supplies in the US

Global Disposable Medical Gloves: COVID-19 Impact Analysis

Global Disposable Medical Supplies

Global Industrial & Institutional Cleaning Chemicals

Global Industrial & Institutional (I&I) Disinfectants & Sanitizers: COVID-19 Impact Analysis

Global Nonwovens

Global Pharmaceutical Packaging

Global Protective Packaging

Industrial & Institutional (I&I) Cleaning Chemicals in the US

Medical Device Packaging

Pharmaceutical Packaging

Pouches in the US

Wipes

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Construction: United States

COVID-19 Market Impact Analysis

Deathcare: United States

Demographics: United States

Disposable Medical Supplies: United States

E-Commerce: United States

Electronic Health Records: United States

Global Healthcare

Healthcare Insurance: United States

Healthcare: United States

Kidney Dialysis Centers: United States

Manufacturing: United States

Medical Equipment & Supplies: United States

Medical Services: United States

Pharmaceuticals: United States

Restaurants & Foodservice: United States

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Trade Publications

Infection Control Today

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Medical Device & Diagnostic Industry
Nonwovens Industry

Agencies & Associations

Advanced Medical Technology Association
American Hospital Association
American Medical Association
Association for the Advancement of Medical Instrumentation
Medical Device Manufacturers Association
Occupational Safety and Health Administration
Plastics Industry Association
Secure Mask Supply Association
United States Census Bureau
United States Department of Commerce
United States Department of Health and Human Services
United States International Trade Commission
World Health Organization