

North America Surgical Gloves Market Segmented By Type (Nitrile, Latex, Neoprene, Others), By Application (Hospitals & Clinics, Ambulatory Care Centers, Others), By Source (Synthetic v/s Natural), By Form (Non-Powdered v/s Powdered), By Distribution Channel (Distributors/Wholesalers, Direct Sales, Drug Stores/Pharmacies, Online Stores, Others), By Country, Competition, Forecast, Opportunities, 2018-2028F

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Abstracts

North America Surgical Gloves Market has valued at USD 1.15 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 11.95% through 2028. the North America Surgical Gloves Market is a significant segment within the broader medical gloves industry. It plays a crucial role in ensuring patient safety and infection control within the healthcare sector, making it a vital component of the healthcare industry in North America.

Key Market Drivers

Rising Surgical Procedures

The rising number of surgical procedures is a significant market driver for the North America Surgical Gloves Market. This driver is crucial for understanding the market dynamics and the increasing demand for surgical gloves. The North America Surgical Gloves Market benefits from the continuous growth in the volume of surgical procedures performed in the region. This growth is attributed to various factors, including

demographic changes and advancements in medical technology. As the population ages, the prevalence of chronic illnesses and conditions requiring surgical interventions increases. Additionally, medical breakthroughs and innovations have expanded the range of surgical procedures available, leading to a broader spectrum of patients requiring surgical treatment.

Surgical procedures encompass a wide range of medical interventions, including both elective and non-elective surgeries. Elective surgeries, such as cosmetic procedures, joint replacements, and elective orthopedic surgeries, have become increasingly popular as patients seek to improve their quality of life. Non-elective surgeries, on the other hand, include emergency procedures, trauma surgeries, and treatments for acute medical conditions. The demand for surgical gloves remains consistent across both categories, as maintaining a sterile surgical environment is essential for infection prevention in all surgical settings.

Technological advancements have led to the growth of minimally invasive surgical techniques, such as laparoscopy and robotic surgery. These procedures often require specialized surgical gloves designed for precise control and tactile sensitivity. The adoption of minimally invasive techniques has expanded the scope of surgeries that can be performed, further driving the demand for surgical gloves. Improved healthcare access, driven by healthcare reforms and increased insurance coverage, has made surgical procedures more accessible to a broader segment of the population. This has led to a greater number of patients seeking surgical treatments, thereby increasing the consumption of surgical gloves across various healthcare facilities, including hospitals, ambulatory surgery centers, and clinics.

Stringent Infection Control Measures

Stringent infection control measures are a crucial market driver for the North America Surgical Gloves Market. These measures play a pivotal role in shaping the demand for surgical gloves in the region. Infection control is a top priority in healthcare settings to ensure patient safety and prevent healthcare-associated infections (HAIs). Surgical gloves are an essential component of infection control protocols. They serve as a critical barrier between healthcare workers and patients during surgical procedures, minimizing the risk of contamination and transmission of pathogens.

Regulatory bodies in North America, such as the Food and Drug Administration (FDA) in the United States and Health Canada, have established guidelines and standards that mandate the use of surgical gloves in healthcare settings. Compliance with these

regulations is not only a legal requirement but also a fundamental aspect of maintaining high-quality patient care. Non-compliance can result in penalties and legal consequences for healthcare providers, which reinforces the need for stringent infection control measures, including the use of surgical gloves.

HAIs are a significant concern in healthcare settings, leading to patient morbidity, increased healthcare costs, and even mortality. The consequences of HAIs have prompted healthcare facilities to implement rigorous infection control measures, including the use of high-quality surgical gloves. Surgical gloves act as a physical barrier to prevent the transfer of microorganisms between healthcare workers and patients, reducing the risk of HAIs. Patients and their families are becoming increasingly aware of the importance of infection control in healthcare facilities. High-profile cases of infectious disease outbreaks and greater access to healthcare information have made patients more discerning about the hygiene practices of healthcare providers. This heightened awareness exerts pressure on healthcare institutions to maintain stringent infection control measures, which, in turn, drives the demand for surgical gloves.

Growing Awareness of Healthcare Hygiene

Growing awareness of healthcare hygiene is a significant market driver for the North America Surgical Gloves Market. This driver underscores the importance of hygiene in healthcare settings and how it impacts the demand for surgical gloves. The healthcare industry in North America is increasingly focused on patient-centered care, which places the patient's well-being and safety at the forefront. Patients are becoming more educated about healthcare-associated infections (HAIs) and are demanding higher standards of hygiene during their medical treatment. They expect healthcare providers to prioritize their safety, and this demand has a direct impact on infection control measures, including the use of surgical gloves.

The public has greater access to healthcare information through the internet, social media, and traditional media outlets. High-profile cases of HAIs and infectious disease outbreaks have received extensive media coverage, raising public awareness of the risks associated with inadequate hygiene in healthcare settings. As a result, patients and their families are more informed and proactive in ensuring that healthcare facilities maintain rigorous hygiene standards.

Patients in North America have more options when it comes to choosing healthcare providers. They can select hospitals, clinics, and ambulatory surgery centers based on factors such as quality of care and safety standards. Healthcare facilities that prioritize

hygiene and infection control, including the use of high-quality surgical gloves, have a competitive advantage in attracting patients who prioritize safety and cleanliness. Healthcare consumers often rely on online reviews and ratings to make informed decisions about their healthcare providers. Positive reviews related to cleanliness and infection control practices can enhance a healthcare facility's reputation and attract more patients. Conversely, negative reviews about hygiene issues can deter potential patients. Thus, healthcare institutions have a strong incentive to maintain high hygiene standards, which includes the proper use of surgical gloves.

Advancements in Material and Technology

Advancements in material and technology are significant market drivers for the North America Surgical Gloves Market. These advancements have led to the development of more sophisticated and effective surgical gloves, contributing to the market's growth. Surgical gloves have evolved with the introduction of advanced materials such as nitrile, neoprene, and polyisoprene. These materials offer superior strength, flexibility, and puncture resistance compared to traditional latex gloves. Nitrile gloves, in particular, have gained popularity due to their latex-free nature, reducing the risk of allergic reactions among both healthcare workers and patients.

Technological advancements have led to the development of thinner and more tactile surgical gloves. These gloves provide healthcare professionals with improved sensitivity and dexterity, allowing for more precise surgical procedures. Surgeons can perform delicate and intricate tasks with greater accuracy, contributing to better patient outcomes. Modern surgical gloves are designed with ergonomic considerations in mind. They feature anatomical shaping and contouring to provide a comfortable and snug fit. This design minimizes hand fatigue during long surgical procedures, enhancing the overall user experience for healthcare workers.

Technological innovations in glove manufacturing processes have resulted in higher quality and consistency. State-of-the-art manufacturing techniques ensure that each glove meets stringent quality standards, reducing the likelihood of defects and perforations during surgery. Advancements in surgical glove technology have made double-gloving more practical and comfortable. Double gloving offers an additional layer of protection against glove breaches, minimizing the risk of pathogen transmission. Barrier protection technologies, such as antimicrobial coatings, further enhance the safety of surgical gloves.

Key Market Challenges

Supply Chain Disruptions

One of the most significant challenges faced by the North America Surgical Gloves Market is the potential for supply chain disruptions. The global supply chain for medical gloves, including surgical gloves, has faced disruptions in recent years due to various factors. These disruptions can be caused by natural disasters, such as hurricanes or earthquakes, or by unexpected events like the COVID-19 pandemic. Interruptions in the supply chain can lead to shortages and supply imbalances, resulting in increased prices and delayed deliveries of surgical gloves.

Escalating Raw Material Costs

The production of surgical gloves relies heavily on specific raw materials, including latex, nitrile, and neoprene. The cost of these materials can be subject to fluctuations driven by factors such as weather conditions, geopolitical tensions, and supply-demand dynamics. Escalating raw material costs can put pressure on glove manufacturers, potentially leading to increased prices for surgical gloves. This, in turn, may pose challenges for healthcare facilities that need to manage their budgets while ensuring a consistent supply of high-quality gloves.

Regulatory Compliance and Quality Assurance

While regulatory requirements and quality standards are essential for ensuring the safety and effectiveness of surgical gloves, they can also pose challenges for manufacturers. Meeting and maintaining compliance with regulatory agencies, such as the FDA in the United States, is a complex and resource-intensive process. Changes in regulations, including those related to labeling, packaging, and manufacturing practices, can require costly updates and adjustments. Additionally, quality assurance processes must be rigorous to ensure that surgical gloves are free from defects and meet established standards. Any lapses in quality can lead to product recalls and damage to a manufacturer's reputation.

Key Market Trends

Rising Demand for Sterile Surgical Gloves

An ongoing trend in the North America Surgical Gloves Market is the increasing demand for sterile surgical gloves. Sterility is of paramount importance in surgical

procedures to minimize the risk of infections and ensure patient safety. Healthcare facilities are increasingly prioritizing the use of sterile surgical gloves to comply with stringent infection control standards and to reduce the incidence of healthcare-associated infections (HAIs). As a result, manufacturers are focusing on developing advanced sterilization techniques and packaging solutions that maintain the sterility of gloves until they are needed in the operating room.

Shift Towards Powder-Free Gloves

The notable trend is the shift towards powder-free surgical gloves. Traditional powdered gloves, which were used to facilitate easy donning, have become less popular due to concerns about allergenic reactions and the potential for contaminating surgical sites. Healthcare providers are opting for powder-free gloves made from materials like nitrile or neoprene, which offer the same ease of use without the associated risks. This trend aligns with the growing emphasis on patient safety and hygiene.

Adoption of Eco-Friendly and Sustainable Practices

Sustainability is emerging as a significant trend in the North America Surgical Gloves Market. Environmental concerns are prompting healthcare facilities to seek out eco-friendly and sustainable glove options. Some manufacturers are responding by producing gloves made from biodegradable materials or sustainable resources. Additionally, efforts are being made to reduce the environmental impact of glove manufacturing processes. Sustainability initiatives not only resonate with healthcare facilities' commitment to corporate social responsibility but also align with patients' expectations for environmentally responsible healthcare practices.

Segmental Insights

Type Insights

Based on the category of Type, the nitrile surgical gloves segment emerged as the dominant player in the North America market for Surgical Gloves in 2022. Nitrile surgical gloves are made from a synthetic material, eliminating the risk of allergic reactions associated with natural latex gloves. Many individuals, including healthcare workers and patients, are sensitive or allergic to latex proteins. Nitrile gloves provide a hypoallergenic alternative that allows healthcare facilities to cater to a broader patient population without the concern of latex allergies.

Nitrile gloves are known for their exceptional strength and puncture resistance. They are robust and durable, making them suitable for a wide range of surgical procedures, including those involving sharp instruments and needles. Healthcare professionals rely on nitrile gloves for their durability and protective qualities, reducing the risk of glove failure during surgery.

Nitrile surgical gloves have evolved to offer excellent tactile sensitivity and dexterity. Advances in glove manufacturing technology have resulted in thinner and more flexible nitrile gloves that allow for precise manipulation of surgical instruments and tissues. Surgeons and nurses can maintain a high level of sensitivity while wearing nitrile gloves, enabling them to perform delicate and intricate tasks with accuracy. Nitrile gloves are resistant to a wide range of chemicals and hazardous substances commonly found in healthcare settings. This resistance makes them suitable for various medical procedures, including surgeries that involve the use of disinfectants, sterilizing agents, and chemotherapy drugs. The chemical resistance of nitrile gloves helps protect healthcare workers from potential exposure to harmful substances. These factors are expected to drive the growth of this segment.

Application Insight

Based on the category of Application, the hospitals & clinics segment emerged as the dominant player in the North America market for Surgical Gloves in 2022. Hospitals and clinics are the primary locations where a vast majority of surgical procedures are performed in North America. These healthcare facilities cater to a wide range of medical needs, from routine surgeries to complex interventions. The sheer volume of surgical procedures conducted in hospitals and clinics necessitates a consistent and substantial supply of surgical gloves.

Infection control is a top priority in hospitals and clinics to ensure patient safety. Surgical gloves are a fundamental component of infection control measures. They act as a barrier to prevent the transmission of pathogens between healthcare workers and patients during surgery. To maintain sterile surgical environments and reduce the risk of healthcare-associated infections (HAIs), hospitals and clinics rely heavily on surgical gloves. Hospitals and clinics encompass a wide range of medical specialties, from general surgery to specialized fields like orthopedics, cardiology, and neurosurgery. Each specialty may require specific types of surgical gloves tailored to the procedures performed. This diversity in medical services leads to a broad spectrum of glove usage, further contributing to the dominance of hospitals and clinics in the market. These factors are expected to drive the growth of this segment.

Source Insight

Based on the category of Source, the synthetic segment emerged as the dominant player in the North America market for Surgical Gloves in 2022. The synthetic glove segment's dominance is the concern surrounding latex allergies. Natural latex gloves can trigger allergic reactions in both healthcare workers and patients. Latex allergies can range from mild skin irritation to severe anaphylactic reactions, making the use of latex gloves less desirable. Synthetic gloves, such as nitrile and neoprene, offer a latex-free alternative, reducing the risk of allergic reactions.

Synthetic gloves are inherently hypoallergenic. They do not contain natural latex proteins, which are known allergens. This hypoallergenic property makes synthetic gloves a safer choice for individuals with latex sensitivities, ensuring that healthcare facilities can provide care to a broader patient population without concern for allergic reactions. Advances in material technology have led to the development of synthetic gloves that offer performance characteristics comparable to or even superior to latex gloves. Synthetic gloves, particularly nitrile gloves, are now known for their exceptional strength, puncture resistance, and tactile sensitivity. These qualities make them suitable for a wide range of surgical procedures, from routine to complex interventions. These factors are expected to drive the growth of this segment.

Form Insight

Based on the category of Form, the non-powdered segment emerged as the dominant player in the North America market for Surgical Gloves in 2022. Healthcare facilities are increasingly emphasizing hygiene and infection control, especially in surgical settings. Non-powdered gloves align with this trend by reducing the risk of contamination associated with powdered gloves. The absence of powder ensures a cleaner and more sterile surgical environment, which is critical for patient safety and the prevention of healthcare-associated infections (HAIs).

Non-powdered gloves are designed to provide better tactile sensitivity and precision during surgical procedures. Advances in glove manufacturing technology have led to thinner and more flexible non-powdered gloves that allow for precise manipulation of surgical instruments and tissues. Surgeons and nurses can maintain a high level of sensitivity while wearing non-powdered gloves, enabling them to perform delicate and intricate tasks with accuracy. Non-powdered gloves contribute to patient and healthcare worker safety. By reducing the risk of allergenic reactions and contamination, these

gloves help create a safer surgical environment. Patients can be confident that the surgical team is taking all necessary precautions to ensure their well-being, while healthcare workers can perform their duties without concerns about allergic reactions or potential exposure to powder-related contaminants. These factors are expected to drive the growth of this segment.

Distribution Channel Insights

The distributors/wholesaler's segment is projected to experience rapid growth during the forecast period. Distributors and wholesalers have established networks and infrastructure that enable them to reach a wide geographic area efficiently. They serve a broad range of healthcare facilities, including hospitals, clinics, ambulatory surgery centers, and dental offices across North America. This extensive coverage ensures that surgical gloves are readily available to healthcare providers regardless of their location. Distributors and wholesalers offer a diverse range of surgical gloves from various manufacturers and brands. They maintain comprehensive inventories that encompass different glove materials (e.g., latex, nitrile, neoprene), sizes, and specifications to meet the diverse needs of healthcare facilities. This variety allows healthcare providers to select gloves tailored to their specific requirements. Distributors and wholesalers often engage in bulk procurement of surgical gloves, allowing them to negotiate favorable pricing with manufacturers. The cost efficiencies achieved through bulk purchasing benefit healthcare facilities, as they can procure gloves at competitive prices. This is particularly important for hospitals and healthcare organizations seeking to manage their budgets effectively while ensuring a consistent supply of high-quality gloves. These factors collectively contribute to the growth of this segment.

Regional Insights

United States emerged as the dominant player in the North America Surgical Gloves market in 2022, holding the largest market share in terms of value. The United States has one of the largest and most advanced healthcare industries in the world. It is home to numerous hospitals, clinics, ambulatory surgery centers, and dental offices. The sheer size of the healthcare sector translates into a significant demand for surgical gloves. The United States adheres to strict healthcare standards and regulations, emphasizing infection control, patient safety, and quality of care. Compliance with these standards necessitates the widespread use of surgical gloves in various medical settings. The United States offers a wide range of medical services, including general surgery, specialized surgeries, and elective procedures. This diversity in healthcare services leads to a high volume and variety of surgical procedures, all of which require

surgical gloves. The competitive landscape in the United States encourages innovation and quality improvement in surgical gloves. Leading manufacturers and distributors are concentrated in the U.S., providing healthcare facilities with access to a wide array of surgical glove options.

The Canada market is poised to be the fastest-growing market, offering lucrative growth opportunities for Surgical Gloves players during the forecast period. Factors such as Canada has been increasing its healthcare expenditure, investing in the expansion and modernization of healthcare facilities. This growth in healthcare infrastructure is driving the demand for surgical gloves to support surgical procedures. Like the United States, Canada places a strong emphasis on infection control and hygiene in healthcare settings. The awareness of healthcare-associated infections (HAIs) is growing, spurring the adoption of surgical gloves to mitigate infection risks. Canadian healthcare facilities are adopting advanced technologies and practices, including the use of innovative surgical glove materials and sterilization techniques. These advancements enhance the quality and safety of surgical procedures.

Key Market Players

Hartalega USA Inc.

Cardinal Health Inc.

Semperit AG North America

Ansell Americas, LLC

Motex Medical Inc.

Medline Industries, Inc.

3M Company

Honeywell International Inc.

Shandong Yuyuan Latex Gloves Co., Ltd.

Sara Healthcare USA Inc.

Report Scope:

In this report, the North America Surgical Gloves Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Surgical Gloves Market, By Type:

Nitrile

Latex

Neoprene

Others

Surgical Gloves Market, By Application:

Hospitals & Clinics

Ambulatory Care Centers

Others

Surgical Gloves Market, By Source:

Synthetic

Natural

Surgical Gloves Market, By Form:

Non-Powdered

Powdered

Surgical Gloves Market, By Distribution Channel:

Distributors/Wholesalers

Direct Sales

Drug Stores/Pharmacies

Online Stores

Others

Surgical Gloves Market, By Region:

United States

Canada

Mexico

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the North America Surgical Gloves Market.

Available Customizations:

North America Surgical Gloves market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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