

Saudi Arabia Hospital Gowns Market, By Type (Surgical Gowns, Non-Surgical Gowns, Patient Gowns), By Usability (Disposable Gowns, Reusable Gowns), By Risk Type (Minimal, Low, Moderate, High), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Abstracts

Saudi Arabia Hospital Gowns Market was valued at USD 135.12 Million in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 9.85% through 2030. The Saudi Arabian hospital gowns market is experiencing substantial growth, primarily driven by an increase in surgical procedures, enhanced infection control awareness, and the expansion of healthcare infrastructure. The country's healthcare system is undergoing significant modernization, with a notable rise in surgeries due to factors such as an aging population, escalating chronic disease rates, and advancements in medical technology. Furthermore, the high incidence of road traffic accidents in Saudi Arabia is contributing to an increased demand for hospital gowns, particularly within the orthopedic segment.

Despite the growth in healthcare infrastructure, Saudi Arabia remains heavily reliant on the importation of hospital gowns and other medical consumables. This dependency on foreign suppliers exposes the market to potential risks, including supply chain disruptions, fluctuations in currency, and delays in regulatory approvals.

The Saudi hospital gowns market is set for continued expansion, supported by the broader growth of the healthcare sector, rising infection control requirements, and ongoing technological innovations. However, challenges such as reliance on imports and the environmental impact of disposable gowns remain key considerations. To

mitigate these risks, government initiatives focused on sustainability, coupled with a shift towards eco-friendly materials and solutions, are expected to foster innovation and sustain market growth in the coming years.

Key Market Drivers

Rising Road Traffic Accidents and Trauma Care

The rising incidence of road traffic accidents (RTAs) in Saudi Arabia plays a significant role in driving the growth of the hospital gowns market, particularly in the trauma and orthopedic care sectors. This is primarily due to the direct correlation between the increased number of accidents, the need for medical interventions, and the demand for healthcare consumables, including hospital gowns. Saudi Arabia has one of the highest road traffic accident rates in the world, which results in a significant number of trauma-related injuries. These injuries often require immediate and extensive medical treatment, including surgical interventions. Hospital gowns are essential in managing trauma patients especially in emergency care and trauma wards—where quick access to medical procedures is necessary. With a continuous flow of patients from road accidents requiring urgent care, the demand for hospital gowns, particularly in emergency departments and trauma units, increases substantially. Over the past decade, the rate of road traffic fatalities in Saudi Arabia has risen from 17.4 to 24 per 100,000 individuals. Among males aged 16 to 30, road traffic accidents (RTAs) have emerged as the leading cause of mortality in the country, underscoring a critical public health and safety concern.

A large proportion of road traffic accident victims sustain injuries that require orthopedic surgeries, such as fractures, dislocations, and ligament injuries. These surgeries typically involve the use of sterile hospital gowns during the pre-operative, operative, and post-operative phases. As orthopedic surgeries become more frequent due to the higher incidence of road accidents, hospitals are witnessing a corresponding surge in demand for gowns designed specifically for use in surgical and trauma care. This trend significantly impacts the hospital gowns market, particularly in terms of the volume of disposable gowns required to ensure a sterile environment in operating rooms. Road traffic accidents often result in severe injuries, some of which may involve open wounds or fractures. In such cases, infection control becomes a top priority in patient management. Hospital gowns, especially those made from advanced materials with higher fluid resistance and antimicrobial properties, are crucial in minimizing the risk of hospital-acquired infections (HAIs). As the number of trauma cases rises, so does the emphasis on infection control measures, driving the demand for high-quality hospital

gowns that provide adequate protection. This need is particularly evident in intensive care units (ICUs) and trauma wards, where patients with severe injuries require prolonged medical attention and monitoring. Given the high volume of trauma patients from road accidents, Saudi Arabia's healthcare system, including both public and private hospitals, has developed a robust emergency medical service (EMS) infrastructure. EMS teams often transport accident victims directly to trauma centers and surgical units, where immediate treatment is provided. This rapid-response care significantly impacts the demand for hospital gowns, as gowns are essential in all stages of trauma care—from pre-surgical assessments to post-surgical recovery. Hospitals are increasingly procuring large quantities of gowns to accommodate the continuous influx of patients requiring urgent care, further driving market growth. In 2020, the Saudi Red Crescent Authority (SRCA) expanded its operations by increasing the number of ambulance centers to 486 nationwide and deploying 1,379 fully equipped ambulances. In 2018, the SRCA responded to 568,682 emergency calls, including 72,013 cases related to road traffic accident (RTA) injuries, 21,312 fall-related injuries, 11,907 assault-related injuries, and 7,938 pedestrian injuries. The SRCA delivers emergency medical services (EMS) through two primary levels of personnel: paramedics, who possess advanced life-support skills, and emergency medical technicians, who provide basic life-support services. These professionals operate on a 24/7 basis at all SRCA centers, ensuring continuous and reliable emergency care across the country.

Both public and private healthcare facilities in Saudi Arabia are seeing an uptick in the number of trauma patient admissions, with road traffic accidents being a leading cause. Public hospitals, which serve a large segment of the population, are experiencing higher utilization rates in their trauma and emergency care units. Private healthcare providers are also seeing growth in trauma care services, as private medical insurance coverage becomes more widespread. This increase in trauma-related hospitalizations results in a parallel rise in the demand for hospital gowns across both the public and private sectors, further stimulating market growth. Road traffic accidents often result in long-term medical treatment and rehabilitation, which can span several weeks or months. During the recovery process, patients often need to wear hospital gowns during their inpatient stays or while undergoing rehabilitation treatments. As trauma patients spend extended periods in medical care, the demand for reusable or disposable hospital gowns remains high, supporting a continuous flow of sales for gown manufacturers. This long-term requirement ensures sustained market demand, even beyond the immediate post-trauma surgical phase. In response to the high incidence of road traffic accidents and the burden of trauma care, the Saudi government has made significant investments in enhancing trauma care capabilities, including the construction of

specialized trauma centers and the procurement of medical supplies. Hospitals in both the public and private sectors are now better equipped to handle trauma cases, increasing the demand for hospital gowns. These investments are part of Saudi Arabia's broader healthcare modernization efforts, which include expanding access to emergency and trauma care services across the country. The rise in healthcare infrastructure directly correlates with an increase in hospital gown consumption, as more trauma patients are admitted and treated in specialized facilities.

Expansion of the Private Healthcare Sector

The expansion of the private healthcare sector in Saudi Arabia plays a pivotal role in driving the growth of the hospital gowns market. This sector's rapid development is fueled by a range of factors, including rising disposable incomes, increasing health insurance coverage, a growing middle class, and government initiatives aimed at enhancing the quality and accessibility of private healthcare. As the private healthcare sector expands, there is a corresponding increase in the number of hospitals, clinics, specialized care centers, and diagnostic facilities. With this growth comes a higher demand for medical consumables, including hospital gowns, which are essential for patient care during surgeries, procedures, and hospital stays. Private hospitals typically invest in state-of-the-art medical equipment and high-quality consumables to meet patient expectations, which significantly boosts the demand for premium hospital gowns. The establishment of new private healthcare facilities not only increases the number of gown requirements but also raises the standards for the products used, leading to a demand for advanced gown materials that provide both comfort and protective properties. Saudi Arabia's private healthcare sector is positioned to capitalize on the robust demand for medical services, driven by population growth and the ambitious objectives outlined in the government's Vision 2030 national transformation program. According to S&P Global Ratings, addressing this rising demand will require the addition of approximately 30,000 public and private hospital beds across the country between 2023 and 2030. This expansion highlights significant opportunities for private healthcare providers to play a pivotal role in the nation's evolving healthcare landscape.

Private healthcare institutions are highly competitive and focus on delivering superior patient experiences, including comfort, privacy, and high-quality care. As a result, private hospitals and clinics are more likely to invest in higher-end, more comfortable hospital gowns compared to their public counterparts. This includes gowns made from breathable, soft fabrics, and those offering better fit and ease of use. Private healthcare providers are also more likely to adopt eco-friendly, reusable gowns, as part of their commitment to sustainable and responsible healthcare practices. The emphasis on

patient satisfaction in the private sector drives the demand for premium hospital gowns that not only meet safety standards but also enhance the comfort and dignity of patients during their hospital stay. Private healthcare institutions tend to have more flexibility in meeting patient-specific needs compared to public hospitals, which translates into an increased demand for customized and specialized hospital gowns. For instance, private healthcare providers may require gowns tailored for specific types of surgeries or for patients with unique needs (such as bariatric patients, pediatric patients, or elderly individuals). This opens up a niche market for hospital gown manufacturers to offer tailored products designed to meet these specialized requirements. As the private sector grows, the need for diverse hospital gown offerings—ranging from simple patient gowns to specialized surgical gowns—becomes more prominent, driving both volume and variety in market demand. Saudi Arabia is positioning itself as a regional hub for medical tourism, particularly in the private healthcare sector. The influx of international patients seeking high-quality treatment in Saudi hospitals directly contributes to the demand for medical consumables, including hospital gowns. Medical tourists often opt for private healthcare providers that offer a high standard of care, which includes the use of high-quality, hygienic, and comfortable hospital gowns. With the growing number of international patients, private hospitals are under pressure to meet international healthcare standards, leading to a higher consumption of premium hospital gowns. This trend not only boosts the demand for gowns but also drives competition among private healthcare providers to offer the best patient experience, further elevating the quality of hospital gowns used.

Government initiatives aimed at enhancing private healthcare services, such as the expansion of health insurance coverage and the promotion of private-public partnerships, are key drivers of growth in the private healthcare sector. These initiatives have made private healthcare more accessible to a wider portion of the population, increasing the number of individuals seeking treatment in private hospitals. As more individuals opt for private healthcare services due to broader insurance coverage, there is a corresponding increase in the demand for hospital gowns. Private hospitals benefit from higher patient volumes, translating into greater gown requirements. The rise in insured patients seeking high-quality care further accelerates the demand for top-tier gowns in the private sector. Private healthcare facilities in Saudi Arabia are typically early adopters of international best practices and standards, which include infection control measures. As such, they tend to implement stringent protocols for patient safety and hygiene, which drives the demand for disposable hospital gowns that meet high infection control standards. Disposable gowns are favored for their convenience and hygiene benefits, making them the preferred choice in surgical and ICU settings. Additionally, many private hospitals seek to align themselves with global healthcare

trends by procuring hospital gowns that comply with international standards for both quality and environmental impact. This trend influences gown manufacturers to innovate and cater to the growing demands of the private sector, thereby propelling market growth. As the private healthcare sector grows, there is an increase in the number of specialized care centers, such as those focused on orthopedics, oncology, cardiology, and cosmetic surgery. These specialized facilities have specific gown requirements due to the nature of the treatments they offer. For example, surgical gowns used in oncology or cardiology departments may need to meet higher protection standards to safeguard against cross-contamination. The expansion of these specialized services directly contributes to an increase in the diversity of hospital gown types needed, driving demand for gowns that meet the specific needs of different medical disciplines. Manufacturers are thus incentivized to produce a wider range of hospital gowns tailored to the various specialized healthcare services within the private sector.

Key Market Challenges

Dependency on Imported Gowns and Supply Chain Disruptions

One of the most significant challenges facing the Saudi Arabia hospital gowns market is the heavy reliance on imported hospital gowns and medical consumables. Despite the expansion of local healthcare facilities and increasing demand for hospital gowns, Saudi Arabia continues to import a substantial portion of these products, particularly from countries with established manufacturing capabilities. This reliance on international suppliers exposes the market to several risks, including:

Disruptions in the global supply chain, such as transportation delays, manufacturing bottlenecks, or geopolitical tensions, can cause shortages or delays in gown availability, leading to operational challenges in hospitals and healthcare centers. Given that a significant portion of hospital gowns is imported, fluctuations in exchange rates can increase the cost of purchasing gowns from international suppliers. This could lead to higher prices for hospitals and healthcare providers, potentially affecting their budgets for medical consumables. Imported hospital gowns must comply with local regulations and standards, which can sometimes lead to delays in obtaining certifications or approvals for use in Saudi healthcare settings. Regulatory complexities may limit the speed at which hospitals can procure necessary gowns to meet increasing patient demand.

These supply chain and import dependency issues create a challenge for the local market, as healthcare providers may struggle to maintain a steady supply of high-quality

gowns in the face of external disruptions, ultimately impacting the growth of the hospital gowns market.

Environmental Concerns and Sustainability Pressures

Another challenge hindering the growth of the Saudi Arabian hospital gowns market is the growing environmental impact associated with the use of disposable gowns. While disposable hospital gowns are commonly used in many healthcare settings due to their convenience and hygiene benefits, their environmental footprint raises concerns:

The increased demand for disposable gowns, particularly in surgical, emergency, and intensive care settings, contributes to a growing amount of medical waste. Hospitals and healthcare providers are under increasing pressure to manage and reduce waste, as landfills and waste management systems may struggle to handle the volume of single-use medical products, including hospital gowns. Saudi Arabia's growing focus on environmental sustainability, as part of its Vision 2030 initiative, may lead to stricter regulations governing the use of disposable medical products. Healthcare providers may face pressure to adopt more sustainable alternatives, such as reusable gowns or gowns made from biodegradable materials. However, the transition to these alternatives can be costly, both in terms of procurement and operational adjustments, creating resistance within the healthcare system.

While reusable gowns are an environmentally friendlier alternative, they require significant investment in terms of cleaning, sterilization, and maintenance. Hospitals would need to implement robust systems to manage reusable gowns, which can be resource-intensive and costly. These additional costs may deter healthcare providers from adopting sustainable solutions, keeping the market reliant on disposable gowns.

The environmental concerns surrounding hospital gown use and the increasing pressure for sustainability represent a significant challenge for market growth, as both suppliers and healthcare providers work to balance operational needs with growing ecological responsibilities.

Key Market Trends

Integration of Smart Textiles and Wearable Technology

One of the most notable trends influencing the future growth of the Saudi Arabia hospital gowns market is the integration of smart textiles and wearable technology into

hospital gown designs. With advancements in material science and technology, manufacturers are exploring the use of fabrics embedded with sensors, conductive fibers, and even health-monitoring devices to enhance the functionality of hospital gowns. These smart gowns have the potential to revolutionize patient care in the following ways:

Smart hospital gowns equipped with embedded sensors can monitor patient vital signs, such as heart rate, body temperature, respiratory rate, and blood pressure, in real time. This data can be transmitted to medical staff via wireless networks, enabling timely intervention if there are any deviations from normal health parameters. This technology significantly enhances patient safety, particularly in intensive care units (ICUs) or post-operative recovery settings. With the rise of telemedicine and remote patient care, smart hospital gowns can facilitate continuous monitoring of patients outside of traditional healthcare settings. For patients recovering at home, these gowns can provide physicians with up-to-date health information, enabling remote consultations and reducing hospital readmissions. The incorporation of high-tech materials can also improve patient comfort by regulating temperature, moisture, and even preventing pressure ulcers, which are common in immobile patients. These gowns can offer enhanced protection against infections through antimicrobial properties, creating a safer and more comfortable environment for patients during their hospital stays.

The shift towards these innovative smart textiles will lead to increased demand for technologically advanced hospital gowns in Saudi Arabia, especially as healthcare providers seek to integrate more efficient, patient-centric solutions into their operations.

Growing Demand for Sustainable and Eco-Friendly Gown Solutions

Another prominent trend that is expected to drive the growth of the hospital gowns market in Saudi Arabia is the increasing emphasis on sustainability and environmental consciousness. As part of Saudi Arabia's Vision 2030 initiative, there is a national push for more sustainable practices across various industries, including healthcare. This focus on environmental responsibility is expected to significantly influence the hospital gowns market in the following ways:

Reusable hospital gowns made from durable, high-quality materials are becoming more popular as hospitals seek to reduce waste and lower the environmental impact of disposable gowns. The adoption of reusable gowns requires healthcare facilities to implement efficient laundering and sterilization processes, but this investment is often seen as more sustainable in the long run. This trend is particularly relevant in private

healthcare settings, where there is more flexibility in adopting innovative, eco-friendly solutions. In response to growing environmental concerns, manufacturers are increasingly focusing on developing hospital gowns made from biodegradable or recyclable materials. These gowns offer the same protective properties as traditional gowns while minimizing the environmental footprint. Saudi Arabian hospitals, particularly those aiming to align with sustainability goals, are likely to prefer gowns made from such materials, driving the growth of eco-friendly hospital gown options in the market. As environmental regulations tighten globally, there will likely be greater demand for hospital gowns that meet green certifications or adhere to sustainable production practices. Hospitals and healthcare providers are expected to increasingly prioritize sustainable products when making purchasing decisions, further driving the demand for environmentally friendly hospital gowns.

The growing importance of sustainability in Saudi Arabia's healthcare sector will lead to increased adoption of sustainable hospital gown solutions, contributing to long-term growth in the market.

Segmental Insights

Type Insights

Based on the category of Type, the Surgical Gown segment emerged as the dominant in the Saudi Arabia Hospital Gowns market in 2024. The primary drivers for the dominance of surgical gowns in the Saudi Arabian market is the rising number of surgeries performed annually. This increase can be attributed to factors such as an aging population, higher rates of chronic diseases (such as diabetes and heart disease), the growing need for elective procedures, and the advancement of surgical technologies. Saudi Arabia is witnessing a growing demand for both elective and emergency surgeries. Surgical gowns are essential in nearly all surgical procedures, as they help create sterile environments and prevent the spread of infection. This trend significantly boosts the demand for high-quality surgical gowns that meet international standards for sterility and protection. The country's investment in healthcare infrastructure includes the development of specialized surgical centers equipped with state-of-the-art technologies such as robotic surgeries and minimally invasive procedures. These surgeries require gowns that provide not only comfort and flexibility but also high levels of infection control, which is where surgical gowns stand out due to their superior material construction and compliance with sterilization requirements.

In Saudi Arabia, infection control is a critical concern in both public and private

healthcare sectors. Hospitals are under constant pressure to minimize the risk of hospital-acquired infections (HAIs), which can lead to extended patient recovery times, increased healthcare costs, and, in some cases, patient fatalities. Surgical gowns play an integral role in minimizing infection risks in surgical settings, as they are designed to offer enhanced fluid resistance, antimicrobial properties, and barrier protection. Saudi Arabia's health authorities have imposed strict infection control protocols, particularly in operating rooms, intensive care units (ICUs), and emergency departments. These protocols mandate the use of sterile and high-quality surgical gowns during surgeries and other high-risk medical procedures to maintain a sterile environment. Surgical gowns are designed to provide a high level of protection against the transmission of pathogens, fluids, and contaminants, thus ensuring the safety of both patients and healthcare providers. The increasing emphasis on patient safety and infection prevention in Saudi healthcare settings leads to a higher demand for surgical gowns, which are specifically engineered to meet these standards. The growing sophistication of healthcare in Saudi Arabia, particularly in specialized medical fields such as oncology, orthopedics, and cardiovascular surgery, has further driven the demand for surgical gowns. These specialized procedures often carry higher risks and require additional layers of protection. Surgical gowns are integral to these settings because they provide the necessary sterility and comfort required for complex, high-risk surgeries. Surgical gowns are indispensable in oncology treatments, particularly during surgeries for cancer patients, where sterility is of utmost importance to reduce the risk of infection. Similarly, in orthopedic surgeries, such as joint replacements or spinal surgeries, the gowns serve to maintain a sterile field and protect both the patient and the surgical team from potential contaminants. As Saudi Arabia's healthcare system expands and diversifies, new medical specialties are emerging, each with specific requirements for sterile operating environments. Surgical gowns remain the primary choice in these environments due to their superior functionality and the level of protection they offer for high-risk medical procedures. These factors collectively contribute to the growth of this segment.

Regional Insights

Northern and Central region emerged as the dominant in the Saudi Arabia Hospital Gowns Market in 2024, holding the largest market share in terms of value. The Northern and Central regions, particularly Riyadh, represent the core of Saudi Arabia's healthcare system. These regions are home to the largest and most advanced medical facilities, including public and private hospitals, specialized treatment centers, and research institutions. The substantial healthcare infrastructure in these areas contributes significantly to the high demand for hospital gowns, particularly surgical gowns, which

are essential in various medical settings. As the capital city, Riyadh has the highest concentration of healthcare institutions, including large public hospitals like King Saud Medical City, specialized centers such as the King Faisal Specialist Hospital, and a growing number of private hospitals catering to both local and international patients. The demand for hospital gowns is highest in these hospitals, given the volume of surgical procedures, intensive care units (ICUs), and specialized treatments being conducted. The Northern and Central regions are also home to some of the most advanced healthcare services in the kingdom, including oncology centers, orthopedic clinics, and cardiac care units. These specialized facilities require a steady supply of high-quality hospital gowns, particularly surgical gowns, to maintain sterile environments and ensure patient and healthcare provider safety during complex procedures.

The Northern and Central regions, particularly Riyadh, have the highest population density in Saudi Arabia. With more people residing in these areas, there is naturally a higher demand for healthcare services, resulting in an increased need for hospital gowns. The dense population, combined with a growing number of surgeries and medical procedures, drives the demand for medical consumables like hospital gowns. The rapid urbanization of Riyadh and other cities in the Central region has led to increased healthcare demands. As more people migrate to urban areas in search of better job opportunities and healthcare services, the need for hospitals and medical facilities equipped with the necessary supplies, including hospital gowns, rises correspondingly. As in many countries, Saudi Arabia is experiencing an aging population, and with it, an increase in chronic diseases such as diabetes, cardiovascular diseases, and cancer. This demographic shift significantly contributes to the higher volume of healthcare procedures, thereby raising the need for hospital gowns in these regions. The Central region, particularly Riyadh, is the economic powerhouse of Saudi Arabia, hosting many major businesses, governmental institutions, and international corporations. This economic strength translates into significant investments in the healthcare sector, which includes the procurement of medical supplies like hospital gowns. As the seat of government, Riyadh benefits from substantial public sector investments aimed at improving healthcare infrastructure. This includes funding for the construction and modernization of hospitals, healthcare centers, and specialized clinics that require a consistent supply of hospital gowns. In addition, private healthcare providers, particularly in Riyadh, are increasingly adopting international best practices, which include the use of high-quality hospital gowns to maintain patient safety and comfort. Riyadh and other major cities in the Northern and Central regions are also central to the growth of medical tourism in Saudi Arabia. The government's initiatives to position Saudi Arabia as a hub for medical tourism attract international patients seeking specialized treatments. These patients require high standards of healthcare, including

sterile surgical gowns, further increasing demand for hospital gowns in the region.

Key Market Players

Standard Textile

Angelica Corp

Medline Industries

Aramark

Cardinal Health Inc

3M Co

Report Scope:

In this report, the Saudi Arabia Hospital Gowns Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Hospital Gowns Market, By Type:

Surgical Gowns

Non-Surgical Gowns

Patient Gowns

Saudi Arabia Hospital Gowns Market, By Usability:

Disposable Gowns

Reusable Gowns

Saudi Arabia Hospital Gowns Market, By Risk Type:

Minimal

Low

Moderate

High

Saudi Arabia Hospital Gowns Market, By Region:

Eastern

Western

Northern & Central

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Hospital Gowns Market.

Available Customizations:

Saudi Arabia Hospital Gowns 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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