

Protective Clothing Market For The Life Sciences Industry - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The protective clothing market for the life sciences industry is expected to register a CAGR of 6.62% during the forecast period. The global outbreak of COVID-19 significantly impacted the growth of the protective clothing market across various sectors. The impact is primarily characterized by the increasing demand and sales in the healthcare sector. The health effects and economic implications of COVID-19 have been enormous, as the sudden burst of the pandemic worldwide created a panic during the initial phase. Within a short period, the demand for personal protective equipment increased significantly, such as face masks, gloves, face shields, air-purifying respirators, goggles, and gowns.

Key Highlights

The life sciences sector can be broadly categorized into three major segments (based on protective clothing applications) - pharmaceutical, biotechnology, and medical. Generally, the relative growth of the life sciences segments is linked to the expenditure of regional markets for healthcare and innovation. In the current market scenario, almost all economies, especially developing economies, are increasing their spending on healthcare and innovation.

Owing to the emerging manufacturing activity in the pharmaceuticals sector, the demand for protective clothing to be used in the preclinical and early-phase drugs and production environments is expected to experience increased demand. For example, the Chinese market is vibrant with preclinical and early-phase drugs, is a growing hub of biotech activity, and creates regional opportunities.

According to the World Health Organization, medical devices comprise all the tools used to diagnose or treat ailments, ranging from surgical scissors to pacemakers and complex scanning equipment. Medical device equipment is classified into Class I, Class IIA, Class IIB, and Class III based on the risk involved in handling the material.

The distribution of demand for PPE among businesses across the provinces in August 2021 is largely consistent with the results from the May 2021 PPES. According to the May 2021 results, firms in the healthcare and social assistance sector-led shortage

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expectations.

Various government organizations recognize companies' efforts for their investment in the Life science industry. For instance, in October 2021, UNCTAD awarded agencies for promoting new investment in health infrastructure, in the manufacturing of medical devices, pharmaceuticals, and vaccines, in the production of personal protective equipment, digital health, and life science research.

Additionally, in September 2022, Technical Safety Services, a portfolio company of Levine Leichtman Capital Partners, announced the acquisition of CEPA Operations, Inc. ("CEPA"). They are based in Ontario, California. The Company's services are performed across the lifecycle of a customer facility and ensure the compliant operation of controlled environments such as clean rooms, bio-safety cabinets, medical gas systems, high-purity water systems, laboratory equipment, and more.

Protective Clothing Market Trends

Gloves are Expected to Witness a Significant Growth

Gloves are among the items that are mostly used as single-use items. Gloves are worn when there is the risk of exposure to bodily fluids, secretions, blood, or excretions or while handling contaminated equipment. Healthcare professionals, such as doctors, nurses, and laboratory technicians, are at high risk of exposure to such hazards.

Chemical-resistant gloves protect from peroxide, rocket fuels, very corrosive acids (nitric acid, sulfuric acid, hydrofluoric acid, red-fuming nitric acid), strong bases, alcohols, aldehydes, ketones, esters, and nitro compounds.

Natural (latex) rubber gloves are a popular general-purpose glove because they are comfortable to wear. Their tensile strength, flexibility, and temperature resistance are all exceptional. These gloves protect employees' hands against most aqueous solutions of acids, alkalis, salts, and ketones and abrasions generated by grinding and polishing.

In the healthcare sector, increased awareness among workers regarding the usage of gloves for protection against pathogenic microorganisms has led to their increased adoption. The high demand for gloves and relatively more accessible market entry opportunities in this segment have resulted in multiple vendors emerging in the market.

Gloves are designed to be changed whenever contaminated, which may be between patients and different procedures on the same patient. Hands should be sanitized after the removal of gloves. The OSHA Regulation on Occupational Exposure to Bloodborne Pathogens requires healthcare institutions to provide handwashing facilities to employees and ensure that they wash their hands immediately or as soon as feasible after removing gloves. It even calls for employers to offer hypoallergenic gloves at no cost, thus, creating opportunities for vendors with such products under their portfolio.

North America is Expected to Witness a Significant Market Share

One of the factors influencing employment in the US is the bio-sciences sector. Venture capital investments and job development across the entire life sciences sector drive the US biotechnology business. Additionally, the biopharma sector contributes significantly to job growth, making it a crucial sector.

The pandemic's increased demand for PPE resulted in severe shortages, which posed a significant challenge to the nation's healthcare system. Due to its lack of infrastructure for protective equipment, the government has been at the forefront of the fight against the COVID-19 pandemic. Due to this, the nation was forced to implement an export prohibition on protective apparel and import it from other countries.

In September 2021, the Biden Administration announced a USD billion investment to improve infection prevention and control activities across the US public health and healthcare sectors. Improvements in infection prevention are expected to span the healthcare continuum, including 6,000 hospitals, 15,400 nursing homes, other long-term care facilities, 7,900 dialysis clinics, and

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4,700 ambulatory surgery centers, extending to different outpatient settings. Such favorable investments are expected to support the growth of the market studied.

Although PPE kits were meant to be disposed of, importing these items met with serious issues of being washed and repackaged for re-use. The penetration of such duplicate products led the FDA to an investigation. The FDA released a notice recommending health care facilities and providers not to purchase imported medical gloves or companies listed in its List of Import Alert to restrict further penetration of used disposable medical gloves and N95 respirators.

Suppliers in the market whose reach spreads throughout North America to provide products for health imaging, sterile processing, surgical operations, and patient handling are expected to have better business opportunities, and most healthcare centers function as chains. They are expected to go for a one-stop purchase with discrete delivery benefits. With field representatives and distribution centers across the countries, the suppliers can be more attentive and provide one-on-one service, making a huge difference in the market.

Protective Clothing Market Competitor Analysis

The protective clothing market for the life sciences industry is concentrated in nature. Product launches, high expense on research and development, partnerships, and acquisitions are the prime growth strategies adopted by the regional companies to sustain the intense competition. Major companies, like E. I. DuPont de Nemours and Company, Kimberly Clark Corporation, Ansell Limited, and 3M Company, design and manufacture clothes to protect medical personnel from serious workplace injuries.

September 2021 - Triviron Healthcare, a medical technology company, launched SpaceD Radiation Protection Aprons, which leverages NASA's Outlast technology to make the protective gear more comfortable and safer for medical practitioners. Phase change materials (PCM) are used in these aprons to absorb, store, and release heat for optimal thermal comfort during medical procedures.

June 2021 - Ansell announced the opening of its first plant in Russia. Ansell and the Government of the Tula Region signed an investment agreement on the launch of production in Russia. The plant would localize the production of ActivArmr Hycron gloves, designed to protect professionals in severe conditions.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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