

## **Surgical Drapes and Gowns Market- Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The surgical drapes and gowns market is projected to register a CAGR of 5.6% during the forecast period (2022-2027).

Almost every aspect of the global economy, including the global supply chain, was severely disrupted by the COVID-19 pandemic. Initially, factories were shut down or slowed production; several countries imposed export and import restrictions, and transportation was slowed or halted. Emerging diseases such as Ebola hemorrhagic fever, hepatitis B, hepatitis C, SARS, and, most recently, the COVID-19 epidemic have raised awareness for personal protective equipment (PPE) worldwide. Since the start of the COVID-19 pandemic, demand for personal protective equipment (PPE) such as surgical masks, gloves, and gowns were skyrocketed. The market players were also taking initiatives to meet the increasing demand for surgical gowns, drapes, and others. For instance, in October 2020, Health Supply US (HSUS) delivered 100% American-made isolation gowns to the United States Defense Logistics Agency (DLA). HSUS was working to produce up to 35 million Berry Amendment-compliant gowns that will contribute to the nation's response to the COVID-19 pandemic through the Strategic National Stockpile. Thus, COVID-19 has significantly impacted the growth of the market.

The growing number of surgical procedures due to sports injuries, accidents, and cardiac surgeries owing to the high prevalence of cardiovascular diseases and other chronic conditions where surgery is being suggested as mandatory is the primary factor driving the surgical drapes and gowns market. Surgical gowns and drapes are also in high demand due to the rising demand for patient and healthcare worker protection and the increasing prevalence of surgical site infections. According to the Annual National and State HAI Progress Report, 2020, there were about 18,416 surgical site infections reported in adults, and 464 surgical site infections were recorded in a pediatric population from acute care hospitals in the United States in 2020. A large number of infections creates the need for surgical gowns and drapes and is thus expected to propel the growth of the market.

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Additionally, the strategic initiatives undertaken by the market players are also propelling the growth of the market. For instance, in December 2021, Medline and 3M collaborated to standardize surgical warming gowns. Creating a normothermia standard of care for every patient reduces post-operative surgical site infections (SSIs) and complications. Such collaborations increase innovation and adoption rates due to their advancements, thus driving the market's growth.

However, infections due to reusable gowns and drapes and product recalls are the major restraints on the growth of the surgical drapes and gowns market.

## Surgical Drapes & Gowns Market Trends

### Surgical Gowns Segment Holds Significant Share in Surgical Drapes and Gowns Market

A surgical gown is one example of personal protective equipment used in healthcare settings. Different names are given to them according to their intended use in hospitals, such as surgical gowns, isolation gowns, surgical isolation gowns, procedural gowns, and operating room gowns, among others.

The COVID-19 pandemic has had a significant impact on the market segment. As per the December 2020 report titled "Covid-19 - PPE demand & supply perspectives", industry experts stated that global production of medical PPE increased by at least 300% at its peak as a result of the COVID-19 pandemic. This ramp-up began in late Q1/early Q2 of 2020 to compensate for a global shortage and meet forward-looking surge orders from governments and private entities. Existing international players expanding their production capacities accounted for 50% to 60% of the increase in supply. For instance, DuPont doubled its gown output.

Moreover, in the healthcare setting, there is a growing demand for a self-donning surgical gown that healthcare personnel can don without assistance. Also, in the context of crisis management during chronic viral and infectious diseases, using a gown that can be put on and removed quickly and safely to prevent onward transmission of environmental infection is more important than ever. Additionally, the increasing investment by the market players is also propelling the growth of the segment. For instance, in May 2021, Windsor-based Harbour Technologies expanded its protective equipment manufacturing operations to Chatham-Kent by opening a state-of-the-art manufacturing facility in Chatham to make surgical isolation gowns.

Thus, owing to the abovementioned factors, the market segment is expected to show growth over the forecast period.

### North America is Expected to Dominate the Global Surgical Drapes and Gowns Market

North America is expected to hold a significant share in the market and is expected to do the same over the forecast period.

The Food and Drug Administration (FDA) released guidance in March 2020 explaining the relaxation of specific regulatory requirements to increase the production and availability of certain personal protective equipment (PPE) such as gowns and gloves as the number of COVID-19 cases grew in the United States and hospitals struggled to keep their doctors and nurses safe. As a result, PPE manufacturing in the United States has greatly improved since the onset of the COVID-19 pandemic. Various players from different verticals joined to combat the infection as well. Due to COVID-19, Arc'teryx, based in North Vancouver, shifted some of its production capacity to create urgently needed surgical gowns for front-line workers in local hospitals.

Moreover, North America dominated the global surgical drapes and gowns market owing to the presence of well-established market players, a growing number of surgical procedures, and an increasing number of surgical site infections. For instance, as per the article titled "Postoperative Wound Infection" published in December 2021 in the National Library of Medicine, over two million nosocomial infections in individuals who have been hospitalized in the United States are caused by surgical site wound infections.

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Additionally, in September 2020, Halyard Health invested around USD 26 million to expand personal protective equipment, including gloves, surgical gowns, and other manufacturing operations. With such investments, there will be increased production of surgical gowns in the region, which will drive market growth.

Thus, owing to the abovementioned factors, the North American region is expected to show growth over the forecast period.

### Surgical Drapes & Gowns Market Competitor Analysis

The surgical drapes and gowns market is very competitive, with most players competing to increase market share. Some of the players operating in the market are 3M, Cardinal Health, Medline Industries, Inc., Sterisets International BV, Owens & Minor (Halyard), Surgeine Healthcare, Medica Europe BV, Molnlycke Health Care AB, Primewear, Amaryllis Healthcare Private Limited, Rhysley Limited, Sterimed Group, and Thermo Fisher Scientific Inc.

Additional Benefits:

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

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