

## **Medical Nonwoven Disposables Market - Growth, Trends, Covid-19 Impact and Forecasts (2023 - 2028)**

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### **Report description:**

The medical nonwoven disposables market is expected to register a CAGR of 5.2% over the forecast period.

The COVID-19 pandemic impacted the global healthcare system and influenced the medical nonwoven disposables market. The restricted access to medical services led to collateral damage to patients with other conditions but in vital need of treatment. An article published in the journal IWJ in February 2021 reported that COVID-19 had impaired access to clinical management of chronic wounds. The article also quoted that due to the COVID-19 restriction and the regulations, patients suffering from diabetes and obesity were at high risk of developing chronic wounds. The temporary closure of hospital services during COVID-19 affected the hospital visits of such patients. Thus, this market's growth was initially impacted due to restrictions, government regulations, and supply chain disruptions. Still, after a few months of the resumption of COVID-19 services, the market witnessed significant growth.

The factors driving this market's growth are the increasing global geriatric population, rising cases of hospital-acquired infections, and technological integration.

A higher incidence of chronic wounds is reported among older adults. The impact of chronic wounds affects the quality of life. Most chronic wounds are associated with conditions common in older individuals, including vascular disease, venous insufficiency, unrelieved pressure, or diabetes mellitus. Thus, with the increased aging, the population becomes prevalent to infection, thereby driving the demand for medical nonwoven products and propelling the growth of the studied market. United Nations 2022 reported 771 million people aged 65 years or over globally in 2022. The older population is projected to reach 994 million by 2030 and 1.6 billion by 2050. Thus, the high incidence of the geriatric population is driving the growth of the studied market.

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The growing prevalence of hospital-acquired infections and rising awareness regarding them are the major growth drivers of the global medical nonwoven disposables market. An article published by Hawassa University in March 2022 reported that hospital-acquired infection (HAI) is an infection acquired as a significant global concern of well-being, affecting the quality of care in the healthcare setting. The article also quoted that the prevalence of hospital-acquired infection (HAI) revealed high in African hospitals, such as the prevalence in Uganda at 28%, Ghana at 14%, and Ethiopia at 7.4% to 19.4% were higher than the prevalence reported in the United States 8.7% and China 4.26%. Therefore, the surging prevalence of hospital-acquired infections among the global population drives the demand for medical nonwoven disposables.

Furthermore, the developments in the technology of manufacturing nonwoven disposables are driving production. The increased adoption of nonwoven disposables across surgical units has driven the demand. In November 2021, Finland's Ahlstrom-Munksjo launched its high-performance sterilization nonwoven wraps under the globally recognized Reliance brand. The sterile barrier systems offer excellent bacterial barriers thanks to cellulosic fibers that create a tortuous path for excellent sterility maintenance of surgical instruments up to the point of use. Thus, the key market players' continuous engagement in developing innovative nonwoven products is expected to provide growth in the future.

Thus, due to the increasing global geriatric population, rising cases of hospital-acquired infections, and technological integration, the market is expected to witness significant growth over the forecast period. However, environmental concerns regarding disposal and the increasing trend of non-invasive and robot-assisted surgeries may slow down the development of the market.

#### Medical Nonwoven Disposables Market Trends

##### Surgical Nonwoven Product Segment Expected to Witness a Significant Growth

Surgical nonwoven products are extensively used in healthcare centers due to increased surgical operations and procedures. Furthermore, surgical nonwoven products have protection against dry or wet contact, which ensures the high safety of healthcare professionals. These factors are expected to drive the growth of this segment over the forecast period.

The increasing number of surgeries is also increasing the demand for surgical nonwoven products, thereby driving the growth of this segment. For instance, in 2021, Canadian Institute for Health Information (CIHI) reported that in the year 2020-2021, 1,06,728 cesarean section delivery, 51,660 hip replacement surgery, and 51,599 knee replacement surgery were performed in Canada. The high number of surgical procedures demands surgical nonwoven products and contributes to this segment's growth.

Furthermore, new product launches and other technological developments are driving this segment's growth. For instance, in May 2022, the Technical University of Munich (TUM) in Germany developed a new kind of film dressing using mucin molecules to accelerate wound healing, expel bacteria, inhibit inflammation, and finally decompose on the skin by itself, which is a new revelation for sensitive skin. Similarly, in June 2022, Medline released its OptifoamGentle EX Foam Dressing. The product has five distinct layers that assist in absorbing shear stress, friction, and moisture. Thus, such new product launches are driving the growth of this segment and contributing to the studied market growth.

The rising geriatric population is also expected to contribute to the market segment's growth. With growing age, the risk of various disorders increases, which may lead to surgical procedures for treatment.

Thus, due to the advantages of surgical nonwoven fibers and the new product launches, the segment is expected to witness significant growth over the forecast period.

##### North America Expected to Witness a Significant Growth

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North America is expected to witness significant growth over the forecast period. The increased awareness regarding hospital-acquired infections among patients and healthcare professionals, the presence of a high geriatric population, and the increased prevalence of urinary incontinence are augmenting the market's growth. Also, the presence of key market players and technological developments contributes to developing new products, thereby driving the market.

The increasing geriatric population in North American countries is driving the demand for medical nonwoven disposable products, as this population is more prevalent to diseases like urinary tract infections (UTIs) and diabetes. These disorders lead to a hyperactive urinary bladder, which may lead to frequent urination and increase the demand for adult diapers. For instance, in July 2022, the United Nations report stated that 10.6 thousand people in Mexico aged 65 and above are expected to increase to 19.7 thousand by 2040. The geriatric population in Mexico is expected to increase by 85.8% by 2040. Thus, the increasing geriatric population may increase the demand for medical nonwoven products, such as adult diapers, and is expected to drive the market in the region.

Furthermore, expansions, mergers, and partnerships are fueling the studied market's growth. For instance, in November 2021, NorthShore Care Supply company behind the NorthShore brand of high-absorbency adult diapers, reported its expansion into Canada. NorthShore has served customers in the United States for nearly two decades with adult diapers and other products. Such expansions are leading to the supply of medical nonwoven products across different countries, thus driving the growth of the studied market in the region.

Thus, due to the high geriatric population, the increased prevalence of urinary incontinence, and the new product launches, the market is expected to witness significant regional growth over the forecast period.

#### Medical Nonwoven Disposables Market Competitor Analysis

The medical nonwoven disposables market is highly competitive and fragmented. It consists of many major players, such as Ahlstrom-Munksjo, Asahi Kasei Corporation, Berry Global Inc., Cardinal Health Inc., First Quality Enterprises Inc., Freudenberg & Co. KG, Georgia-Pacific LLC, Kimberly-Clark Corporation, Unicharm Corporation, Domtar Corporation, Medtronic PLC, MRK Healthcare, Molnlycke Health Care, and Ontex Hygiene Disposables.

#### Additional Benefits:

- <ul> <li> The market estimate (ME) sheet in Excel format </li>
- <li> 3 months of analyst support </li> </ul>

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