

Interconnection Vienna | Oberstdorf | Lviv | Bratislava



we show you the way

www.interconnectionconsulting.com

IC Market Tracking[®]

Non-Woven Medical Disposables in Europe 2016

Offer October 2016

Benefit	Page 03
Market Structure	Page 04
Methodology	Page 07
Content of the Report	Page 10
Examples	Page 11
Prices	Page 16
References	Page 18
Contact	Page 20
Factsheet	Page 21
Order Form	Page 22

Your Benefits at a Glance

- ✓ Overview of the development of the **total market** and the **individual Segments**.
- ✓ **Market Forecasts** for all product segments and regions for the upcoming three year
- ✓ Awareness of **Market Position** and development during the last two years, in comp respect to:
 - Total Market
 - Regional Markets
 - Product Groups
 - Business Segment
- ✓ Information about the most important **Factors of Influence**
- ✓ **Graphic Presentation** of the results facilitates the development of your own strateg



Non-Woven Medical Disposables in Europe



Product Groups

Gloves	<i>Surgical Gloves</i>	<i>Examination Gloves</i>	<i>Reusable Protective</i>		
Tie-On Masks	<i>Anti-Glare</i>	<i>With Visor</i>	<i>Without Visor</i>	<i>Typ II</i>	<i>Typ II R</i>
Earloop Masks	<i>Anti-Glare</i>	<i>With Visor</i>	<i>Without Visor</i>	<i>Typ II</i>	<i>Typ II R</i>
Shoe Covers	<i>With Sole</i>	<i>Without Sole</i>			
Head Covers					

Customer Segments

Public Hospitals
Private Hospitals
Personal Care
Others

For each segment the total market and market shares of the top players for the last two years and forecasts for the next three years are available in the study

Definition and Demarcation

Product Groups

Gloves

Including surgical, disposable gloves , as well as disposable examination gloves and reusable gloves. Gloves are not differentiated by material (latex, non-latex polysoprene, etc.), powdered or not powdered.



Tie-On Masks

Surgical masks including standard masks, anti-fog, anti-germ and anti dust face masks. Masks are tied on for custom fit around the head.



Earloop Masks

Surgical masks including standard masks, anti-fog, anti-germ and anti dust face masks. Securing masks round the head by stretchy earloops.



Shoe Covers

Non-woven shoe covers with and without sole.



Head Covers

Including bouffant caps and surgical bonnets.



Definition and Demarcation

Customer Segments

Public Hospitals

Hospitals which are owned by the Government and receives Government funding.

Private Hospitals

Hospitals owned by a profit company or a non-profit organization and privately funded through payment for medical services by patients themselves, by insurers, or Governments through national health insurance schemes.

Others

Practitioners, Nursing Homes, Clinics, etc.

Distribution Channel

Direct

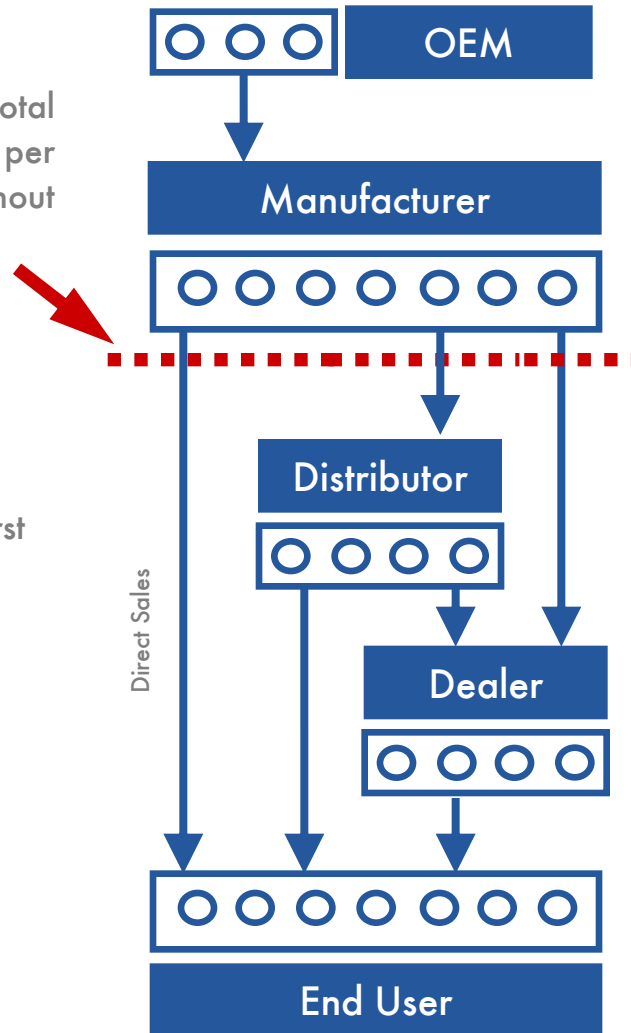
A direct distribution channel includes direct sales from the manufacturer to the end consumer.

Indirect

An indirect distribution channel includes a chain of intermediaries through which a product moves (manufacturers via distributors to wholesalers and then to retailers) before it becomes available for purchase by the end consumer.

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



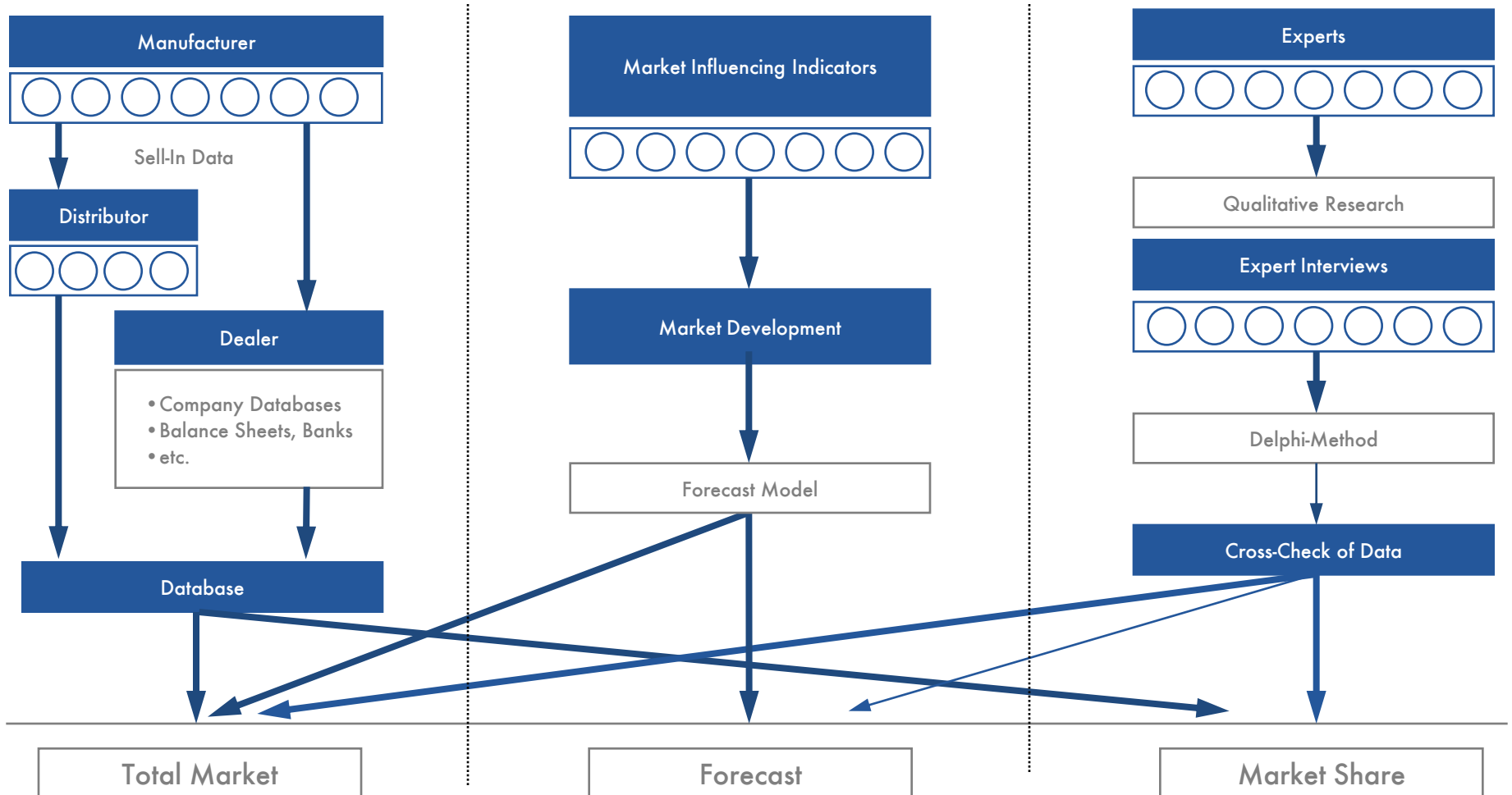
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

Base of Primary Research by Manufacturers & Experts

Description Structure of Survey Methodology

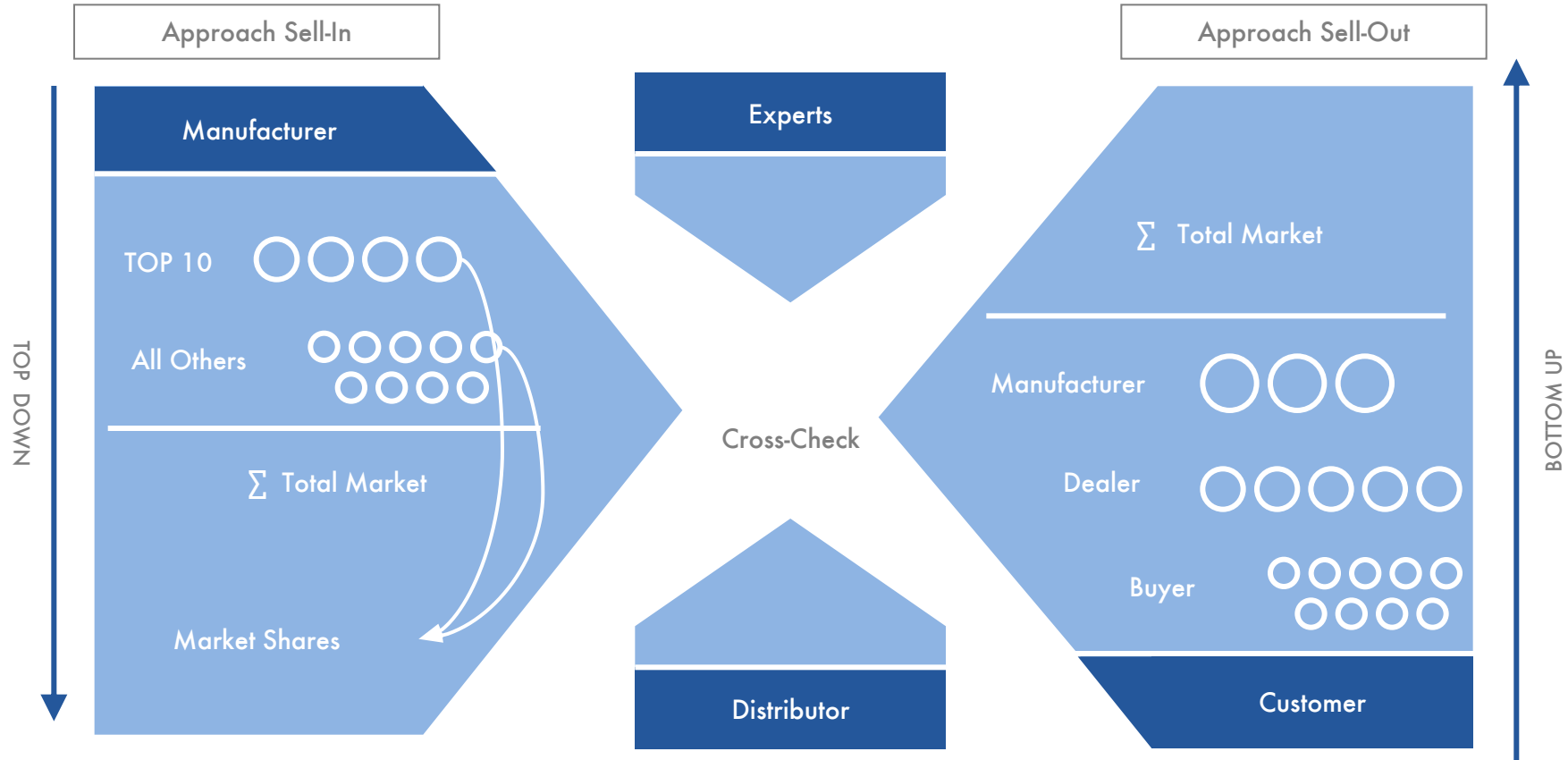
Methodology



Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology



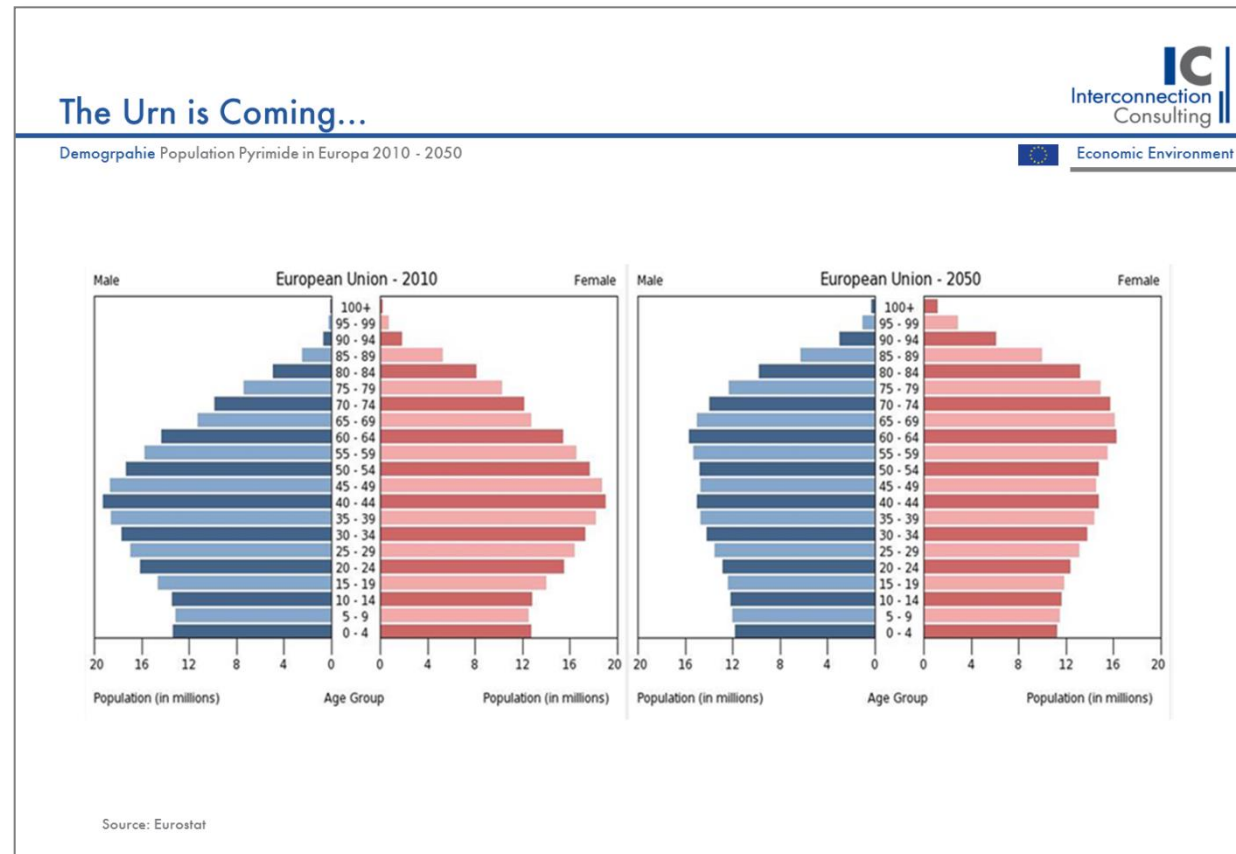
Contents of the IC Market Tracking® Medical Disposables

The IC Market Tracking® is modularly built and consists of the following sections:

- The **Introduction** shows the definition and demarcation of product groups, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market are analyzed in the **Economic Environment**: You will find the most important data on main economic indicators, etc.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as regions, product groups, and ways of distribution. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies in the market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results. Company profiles provide you with further practical information on the main companies in the market.

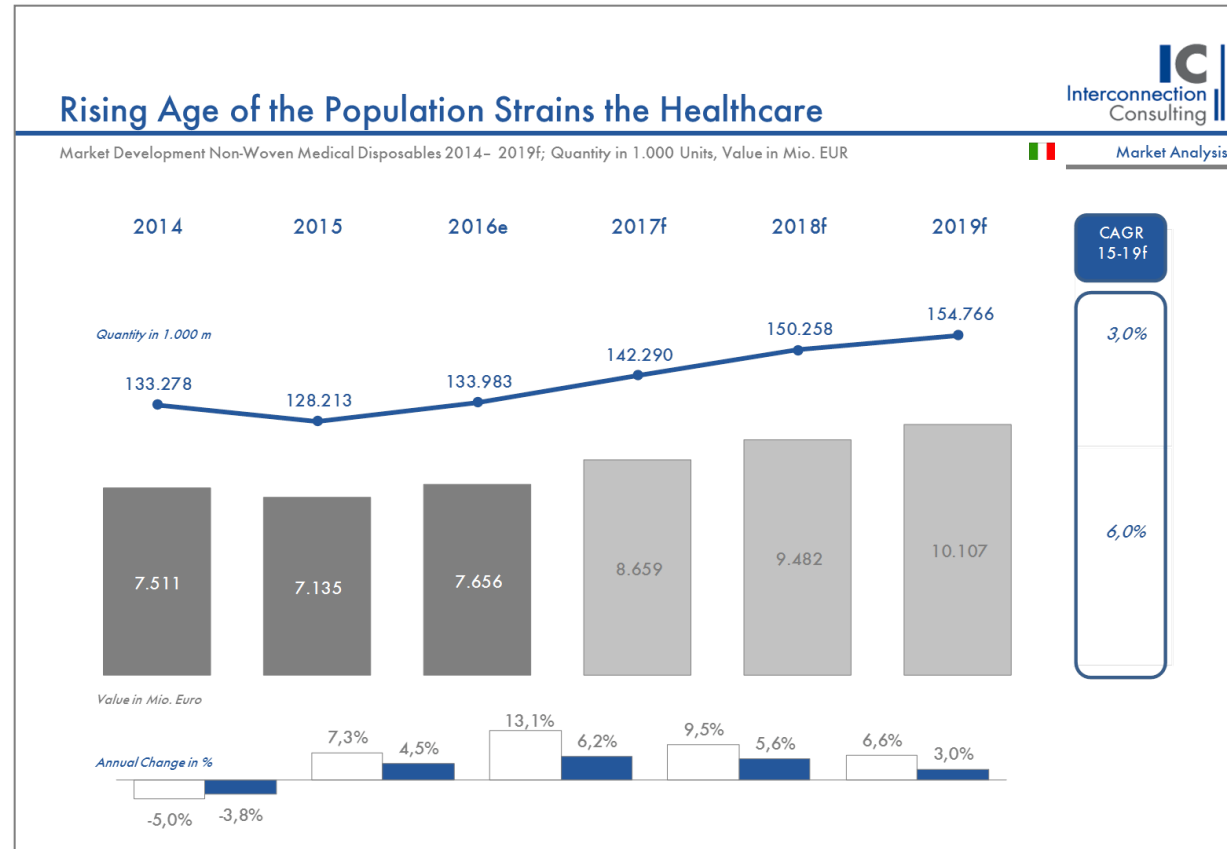
Market Environment Data of our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics and sentiment indicators.
- This chart shows sample figures.



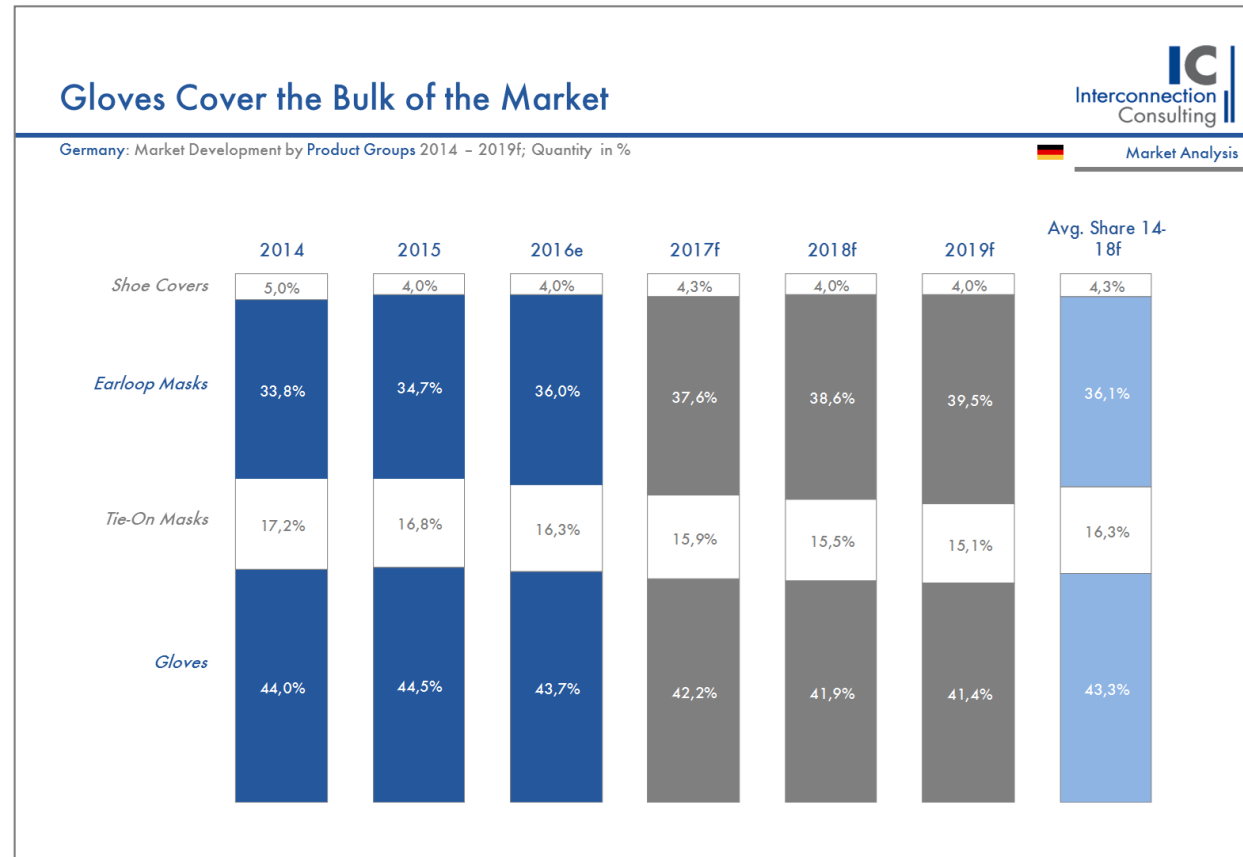
Total Market Development and Forecast

- Overview of the total market until the current year and forecast for the upcoming three years
- This chart shows sample figures.



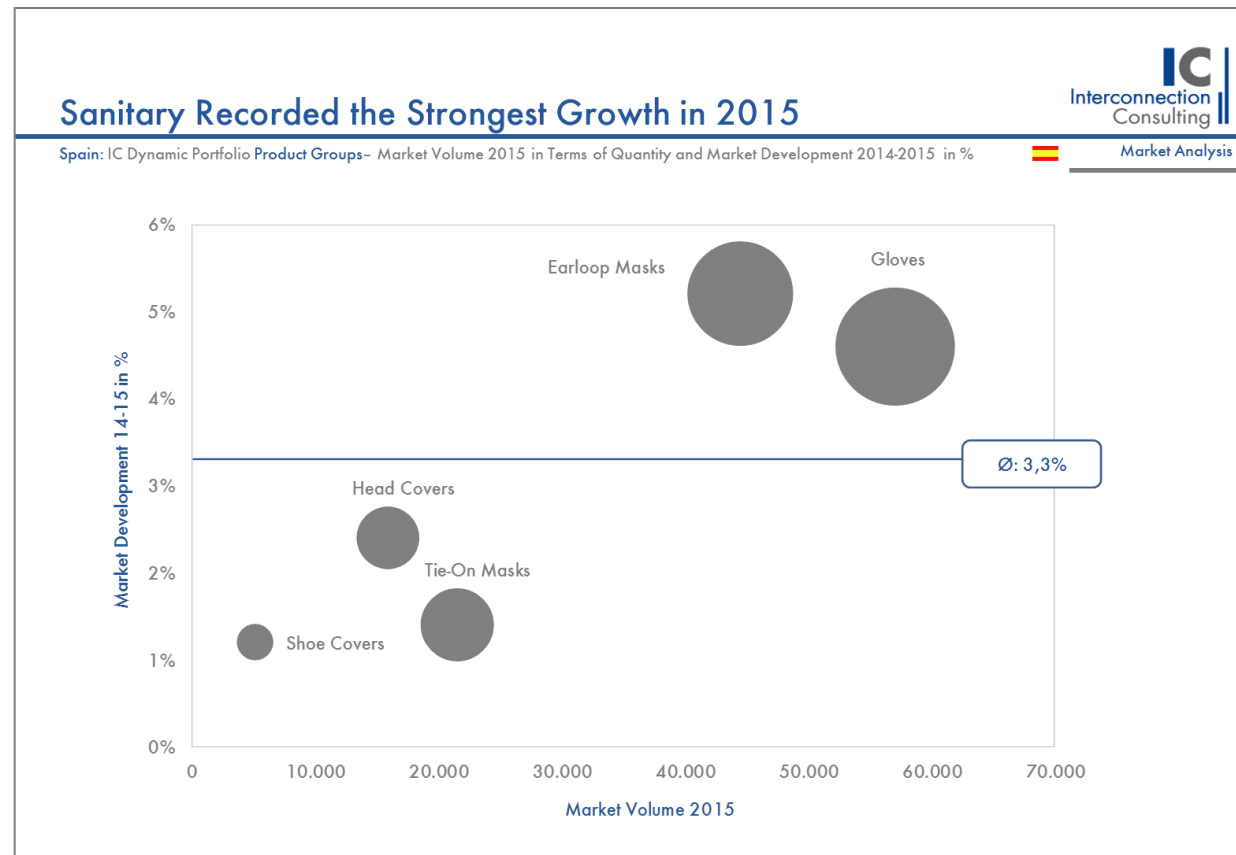
Analysis of Various Product Groups and Segments

- Overview of the development for different product groups, customer segments, etc.
- This chart shows sample figures.



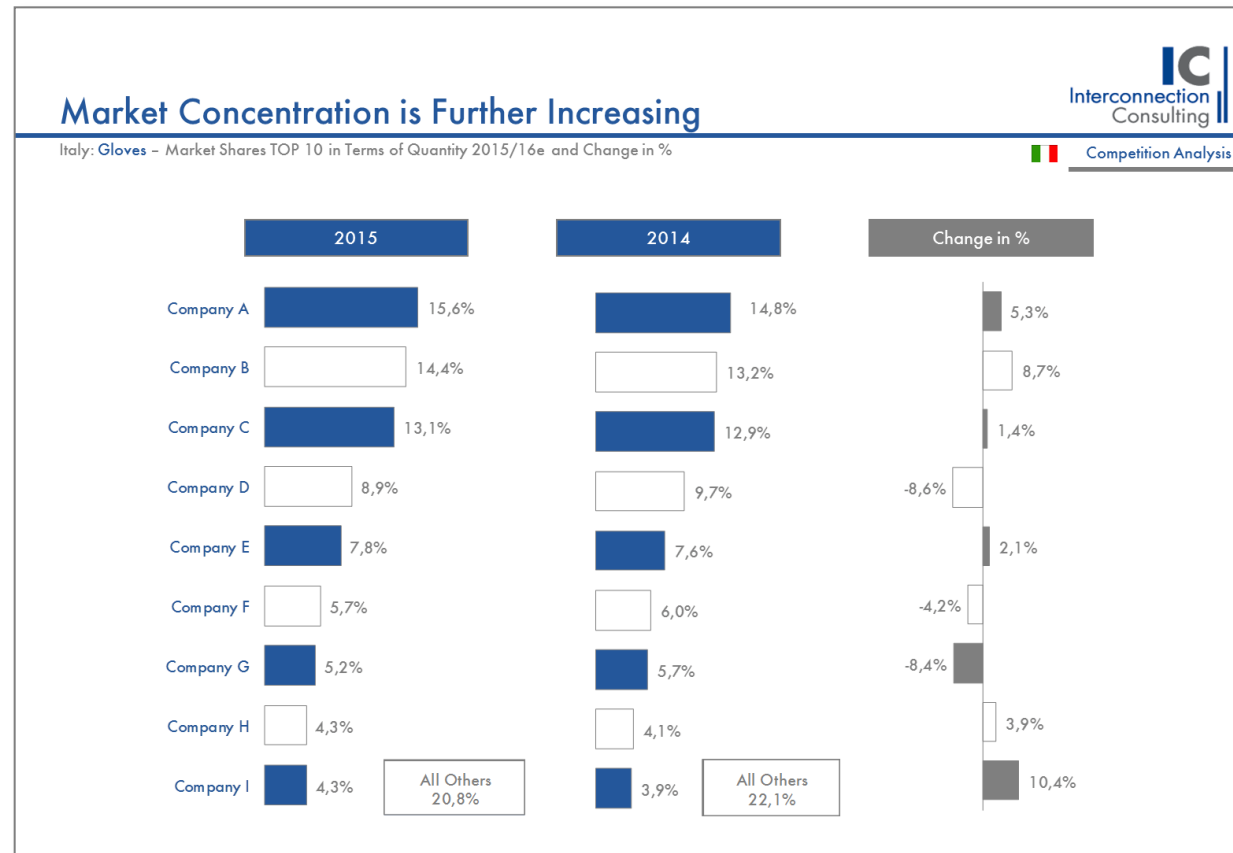
Strategic Analysis of Product Groups and Segments

- Dynamic Portfolios for a strategic analysis of the market and segments.
- This chart shows sample figures.



Competition Analysis and Market Shares

- Market Shares of the Top 10 market leaders of the Indoor Textile Sun Protection Segment.
- This chart shows sample figures.



- Additionally to the visualized report a Pivot Table will be included
- With use of the analyze tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.925	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47

	Subscription	Single Issue	Scale of Discounts from a buying price of	
All Regions	€ 10.325,-**	+25% for Single Issues	€ 5.000	-10%
Single Region	€ 2.950-		€ 7.500	-20%
			€ 10.000	-30%
Available Regions	Germany	UK	Benelux	
	France	Nordics		

* Annual price for at least two orders of the study (order year and the following year). The subscription can be cancelled after two purchases of the study, but not later than at the 31.12. of the year in which the last study has been received. Price changes must be announced by Interconnection at least two months before the issue of a new study. In case of not-cancellation the subscription extends for a further year automatically.

**Prices with regards of the scale of discounts.

Price includes an interactive PDF in electronic form. All prices shown excludes sales tax.

Interconnection Delivers Data for Company Decisions

- Interconnection is the leading institute for market data in the healthcare industry.
- Our studies support the leading companies in the determination of targets, definition of marketing strategies, competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in the industry for medical devices.
- Next to market data we offer for the Industry branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also in the implementation of data in the development of marketing strategies.



Selected References of our Market Reports



Market Analysis



Market Volume
Market Shares & Entry
Competition Analysis

Distribution Analysis



Channel Map
Distribution Matrix
Margins

Customer Insight



Focus Groups
Buying Motives
Customer Benefits

Market Forecasts



Indicator Models
Life Cycle Models
Econometric Analysis

Brand Analysis



Brand Scorecards
Brand - Triangle
Brand Affinity

Customer Satisfaction



Importance/Satisfaction
Portfolios
Customer Loyalty
Customer Typology

Price Research



Price-Sales-Function
Price-Simulation-Tool
Optimal Pricing

Webverstärker



E Commerce Insights
Search Engine Marketing
Web Channel Analysis

For further questions,
please do not hesitate to contact us!

Interconnection Consulting

Getreidemarkt 1, A-1060 Wien

Mag. Ernst Rumpeltes – Head of Market Intelligence

Tel: +43 1 5854623 -38

Fax: +43 1 5854623 -30

rumpeltes@interconnectionconsulting.com

Dr. Frederik Lehner – Managing Director

Tel: +43 1 5854623 -11

Fax: +43 1 5854623 -30

lehner@interconnectionconsulting.com

Interconnection Consulting | Vienna • Oberstdorf • Lviv •
Bratislava

www.interconnectionconsulting.com



we show you the way