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# IC Market Tracking<sup>®</sup>

## Non-Woven Medical Disposables in Europe 2016

Offer October 2016

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# 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

Germany

UK

Benelux

France

Nordics

Market by...

### 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

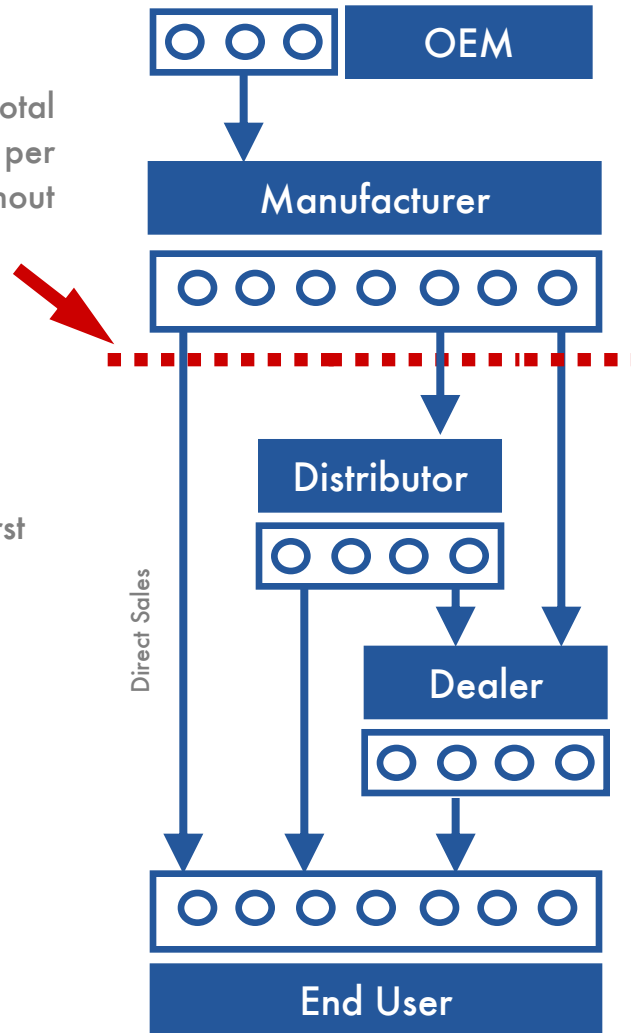
A direct distribution channel includes direct sales from the manufacturer to the end consumer.

### 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.



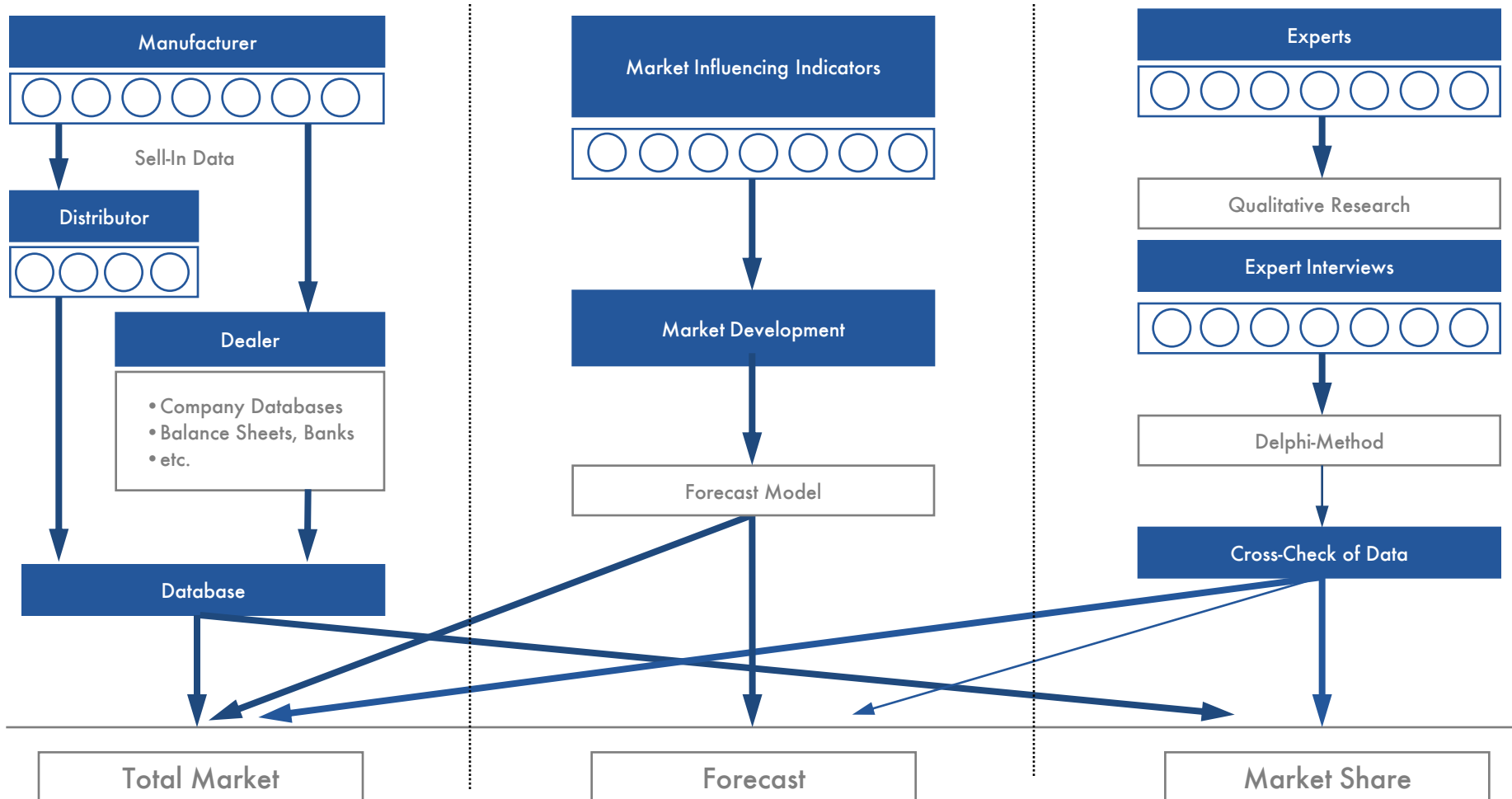
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

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

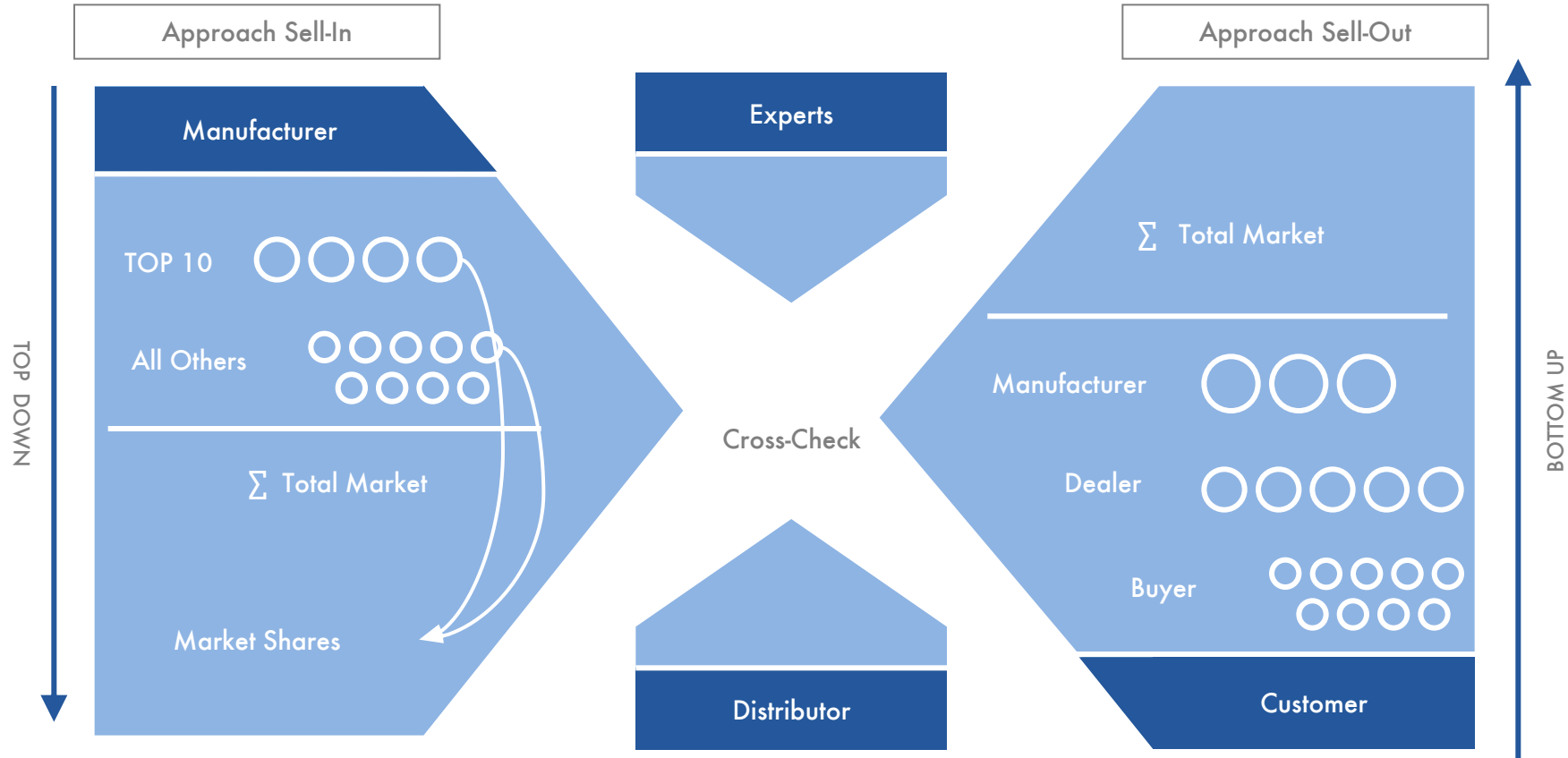




# Data of Manufacturers Aligned with Market Calculation

Description Structure of Survey Methodology

Methodology



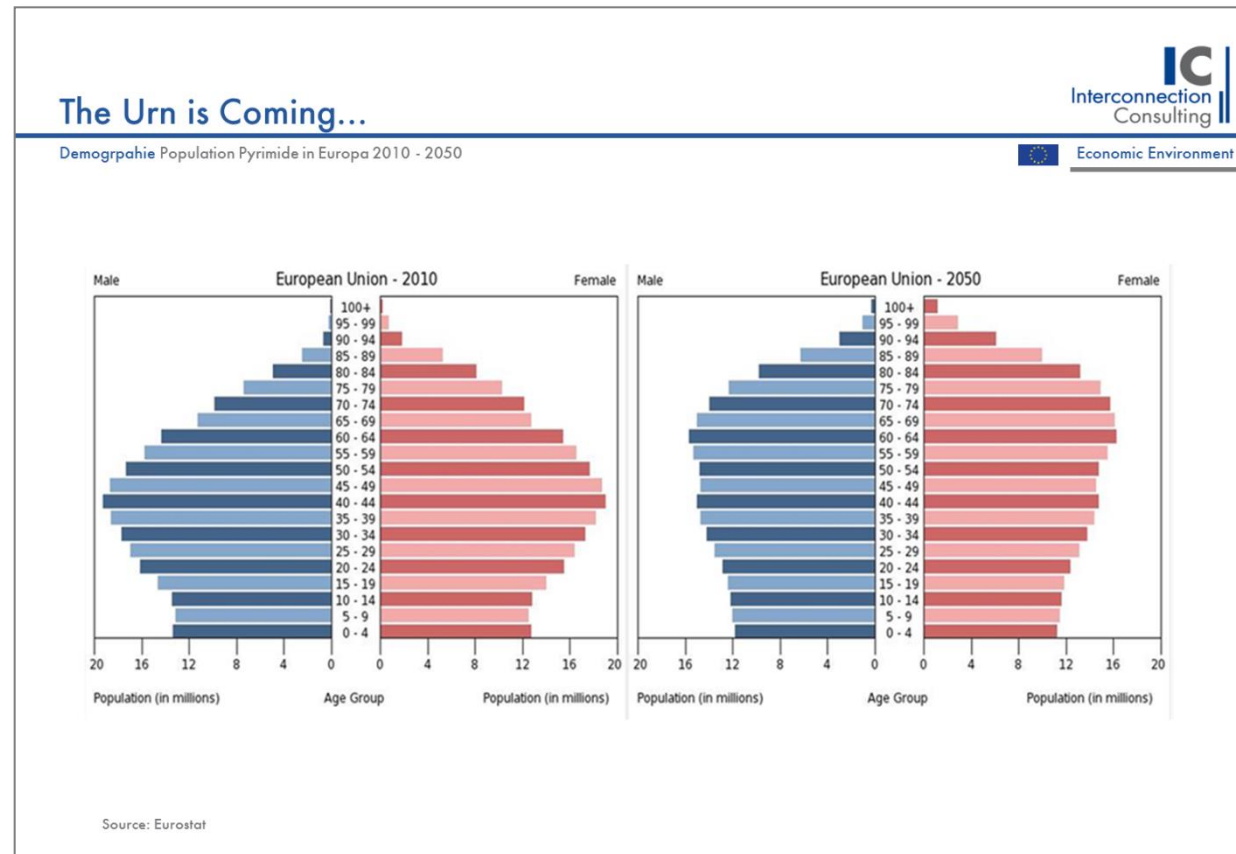
# Contents of the IC Market Tracking® Medical Disposables

*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.

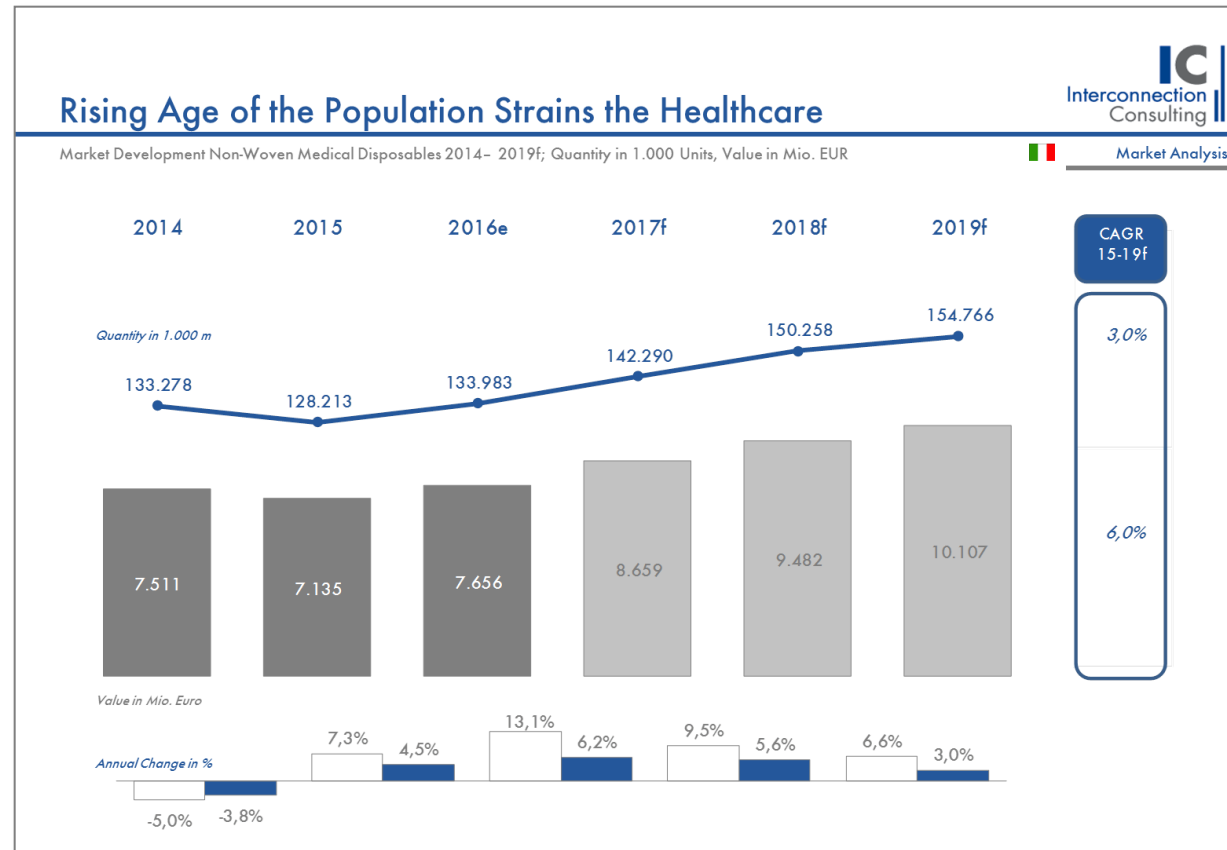
# Market Environment Data of our Forecasting Model

- 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.



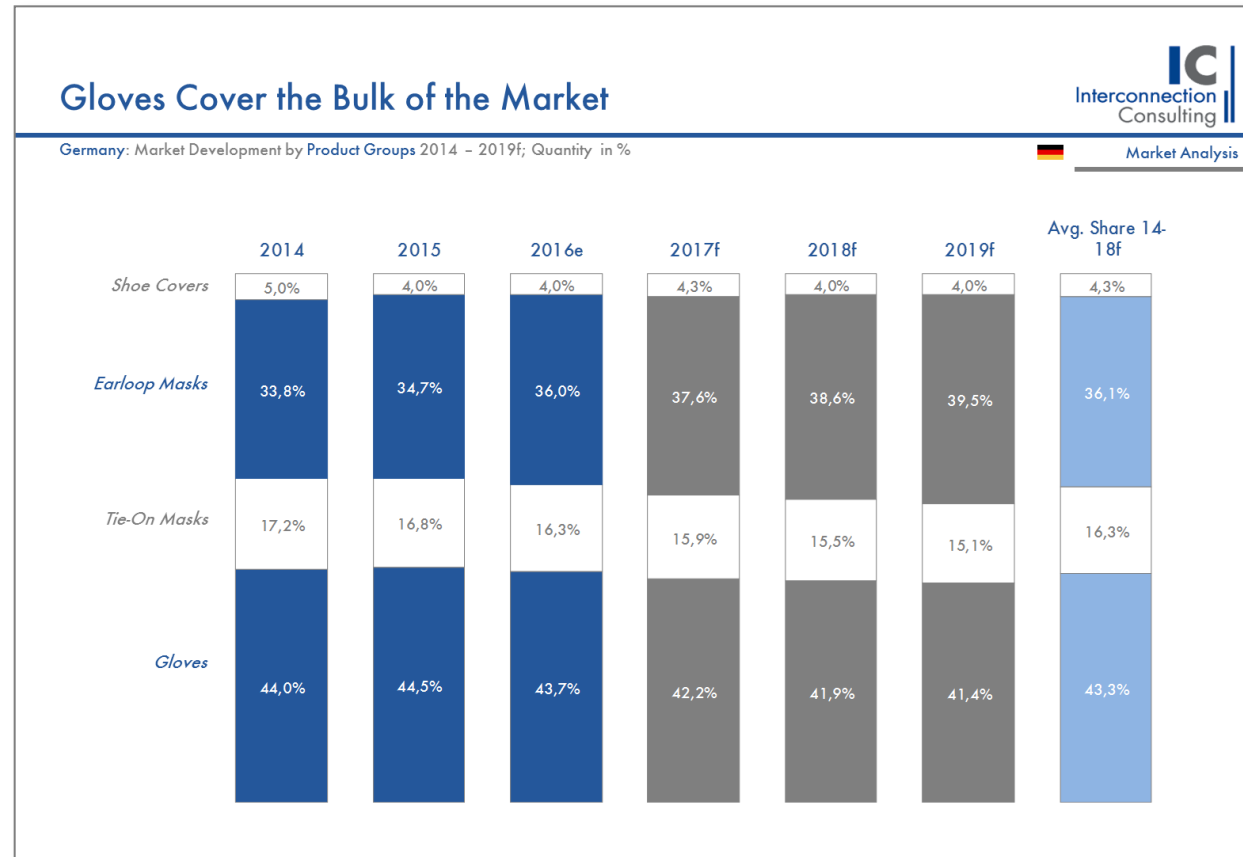
# Total Market Development and Forecast

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



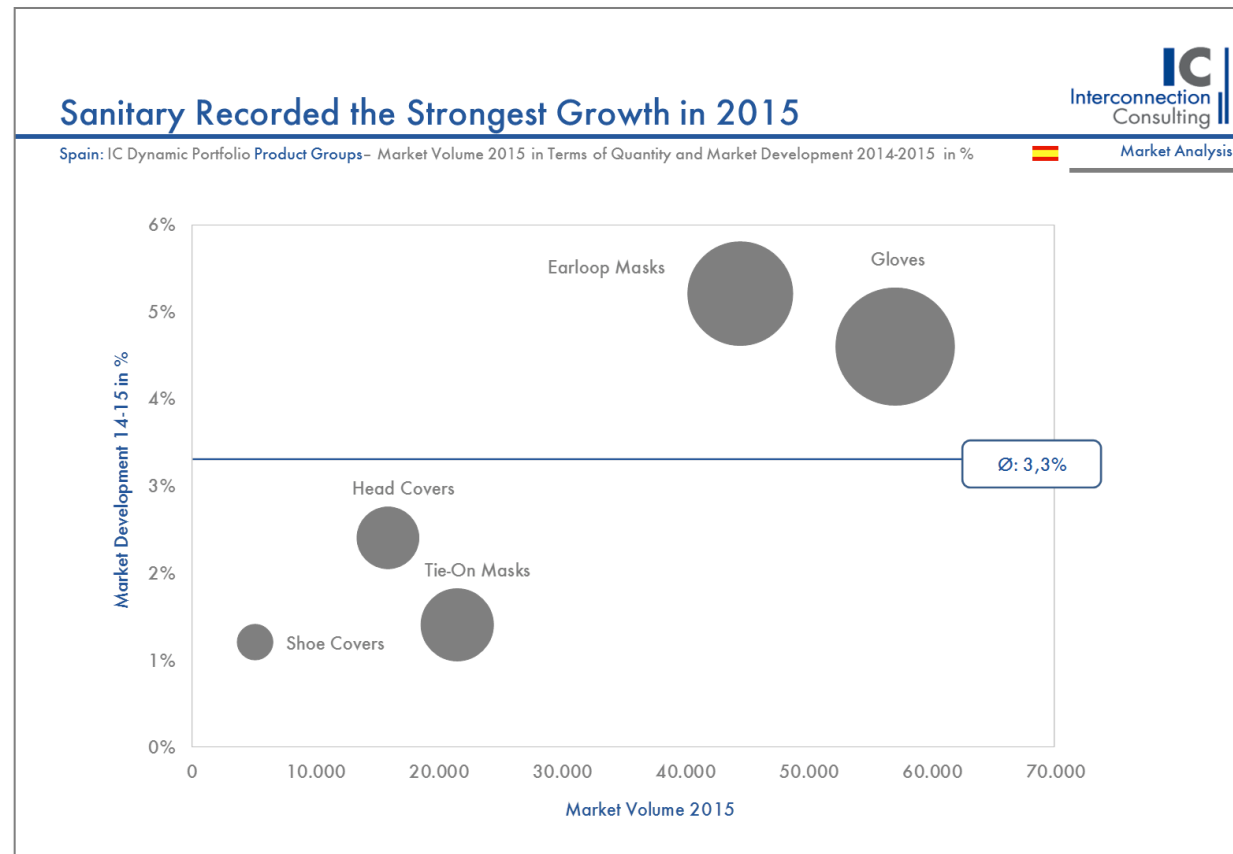
# Analysis of Various Product Groups and Segments

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



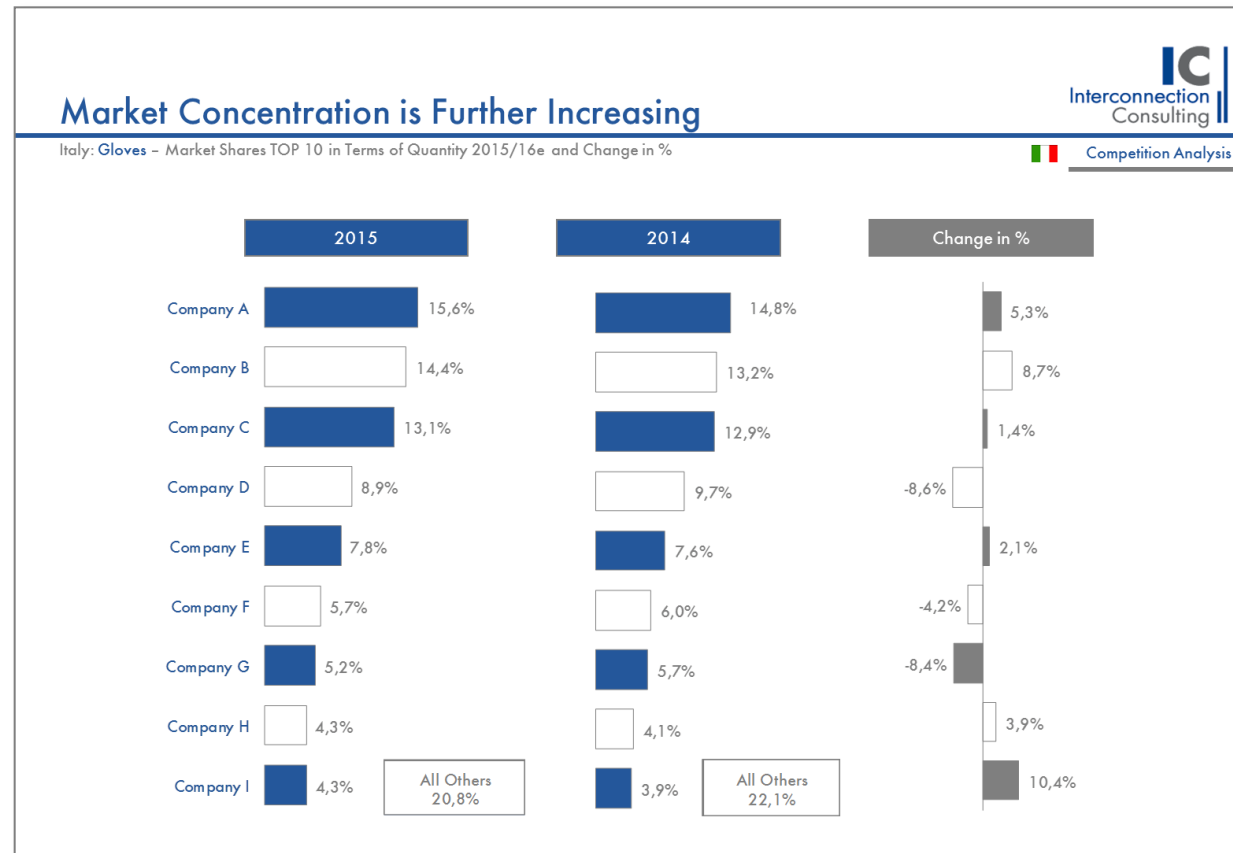
# Strategic Analysis of Product Groups and Segments

- 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	<b>A</b>
Distribution	(All)
Quarter	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)


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

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	<b>4</b>
Quantity/Value	<b>Quantity</b>
Weight Classes	(All)
Country	<b>Germany</b>
Brand	(All)
∅ Price in € (Classes)	(All)

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



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

\* 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!

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**IC**

we show you the way

# Factsheet: IC Market-Tracking® Medical Disposables

## Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 300
- Optional: Hard Copy

## Price

- per country: 2.950 €
- all regions: 10.325 €
- Hard Copy: 150 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.



## Options of ordering – Fax:+43 1 5854623 30

- Click “Buy Now” on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

## Content of the Market Report

### Structure of the Study

#### Language of the report

English

#### Introduction, Market Structure & Executive Summary

Definition and demarcation of product groups, regions and methodology; summary of study results.

#### Market Drivers

Key economic factors influencing the market: main economic indicators.

Import & export statistics.

#### Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, process and business segment.

#### Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years.

### Market Structure

#### Regions

Benelux, France, Germany, Italy, Spain, UK

#### Product Groups

Gloves, Tie-On Masks, Earloop Masks, Shoe Covers, Head Covers

#### Customer Segment

Public Hospitals, Private Hospitals

#### Distribution Channel

Direct, Indirect

### Methodology

#### Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.