Disposing of the Challenge Posed by Reusable Surgical Products

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The increasing penetration of disposables as against reusables, especially in the surgical drapes and gowns segments, is expected to be propelled by the increasing awareness amongst European hospitals about post-operative infection control. This has been underlined by current public health concerns relating to the human immunodeficiency virus (HIV), Creutzfeldt-Jakob disease (CJD) and hepatitis B. In addition, there has been an increased need for products with effective barrier properties for the protection of medical staff. The perceived qualitative advantages of disposable surgical products over their reusable equivalents in terms of infection control and barrier properties is likely to further expand the market for single-use drapes and gowns.

Academia too has now jumped into the disposable versus reusable debate. Influential reports such as the Werner report of March 2001, questioning the quality of many of the traditional reusable products on the market, have come as a shot in the arm to manufacturers of surgical disposables.

The focus on quality products has been further underlined by regulatory issues. Currently, two European standards are being developed: one for surgical drapes and gowns, and another for surgical masks. Both standards are expected to stimulate growth in the disposable market once they are voted on by EU member states in early 2002. This is because it is likely that traditional textile products will fail to meet these new standards and even the 'high tech' reusable products are likely to encounter problems in terms of reprocessing requirements.


This value is forecast to rise to $578 million by 2008 based on the increasing market penetration of single-use drapes and gowns, and at the expense of the reusable alternatives. The study predicts that the highest level of growth is likely to occur in the segment of disposable surgical gowns, while the disposable surgical drapes market is also expected to grow significantly.

The market penetration of disposable surgical gowns has lagged behind the drapes market for a variety of reasons, including price and comfort. This is changing, and forecast to change further, in response to product improvements and heightened concerns about controlling hospital infections, explains the report's author, research analyst, Andy Passey.
Increased usage of disposable instead of reusable products in hospitals, as well as increased product and process innovation are likely to drive growth in the disposable surgical drapes market. Market niches such as incise drapes are growing substantially, and the trend toward procedure trays for specific operations creates new market opportunities for the manufacturers of surgical drapes, states Passey.

The dynamics of the mature surgical masks market varies from that of drapes and gowns in that there is no viable reusable alternative in this segment. However, there is still significant scope for product innovation that is likely to spur growth, Passey notes.

With growth opportunities abounding, the competitive landscape is heating up. In the short-term, the competitive actions of companies manufacturing single-use products are likely to be focused against those manufacturing reusable products. However, an increasing feature of this industry will be the need to take market share from other single-use companies, particularly as the market becomes more mature and the growth rate slows.

A major challenge for the manufacturers of disposable products is likely to be the extent to which collaborative strategies can be pursued to facilitate the shift from reusable to disposable products in hospitals. Educating surgeons, theatre nurses, and infection-control personnel is likely to help overcome traditional biases favouring the comfort factor of reusables over the superior barrier performance of disposables. Education is also expected to overcome the restraints emanating from the high cost perception, and change management implications, of single-use products.

Improvements in operational efficiency along with effective management of suppliers presents substantial saving opportunities. In terms of manufacturing, the trend in many industries is toward production in the Far East. However, it is important not to sacrifice quality, particularly with the major infection control issues that apply to this market, cautions Passey.

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