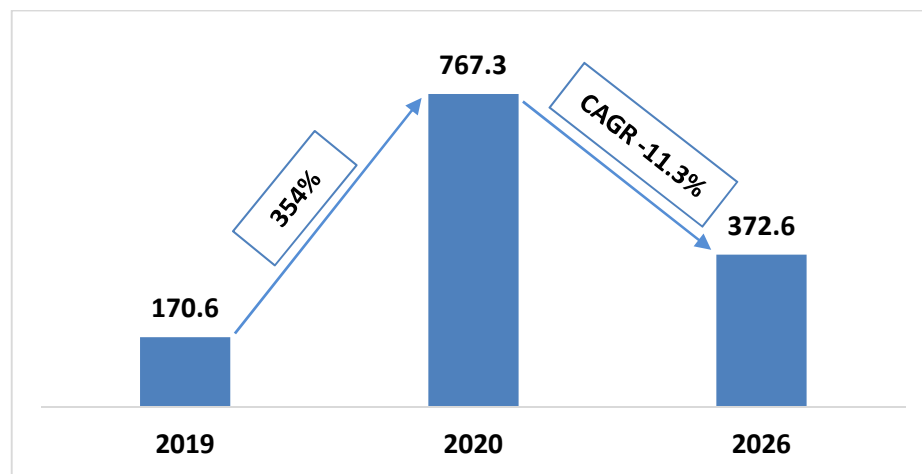


TAM – Total Available Market (UK)

- In 2019, the **Europe Protective Face Masks and Shield market** was valued at **\$170.6 million**.
- In 2020, due to the Covid-19 outbreak the Europe Protective Face Masks and Shield market **increase to \$767.3 million**, as the demand increased rapidly.
- This outbreak evoked a massive demand spurt for face masks across the country, which eventually led it to grow approximately **354%** through 2020.
- But the Europe Protective Face Masks and Shield market is expected to witness a decline **CAGR (-11.3%)** from 2021 to 2026.
- The European region has been significantly affected with COVID-19 with nearly 200,000 cases in Italy alone.¹²³

Europe Protective Face Masks and Shield Market During 2019-2026 (\$Million)



Population of Europe and UK

- In 2020, the **total population in Europe** was approximately **447.7 million**, the population in the **United Kingdom** was **67.8 million**.

¹ <https://www.graphicalresearch.com/industry-insights/1350/europe-protective-face-masks-market>

² <https://www.marketwatch.com/press-release/europe-protective-face-masks-market-is-expected-to-witness--113-cagr-from-2020-to-2026-2020-12-22>

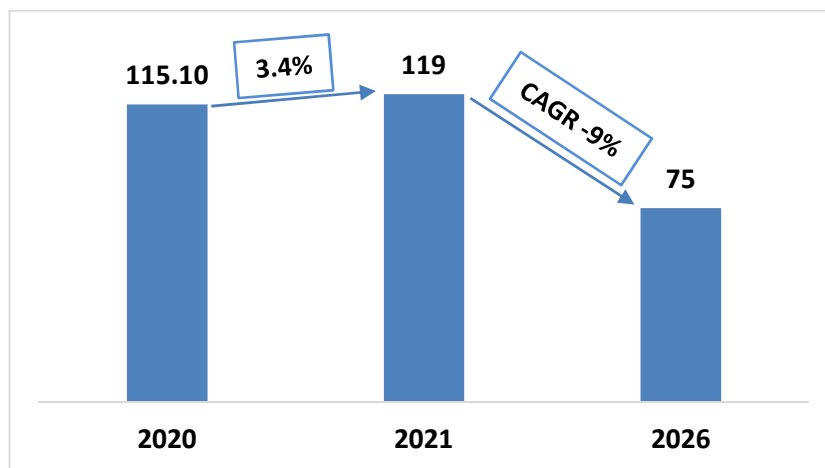
³ <https://eturbonews.com/735290/europe-protective-face-masks-market-5-prominent-trends-accelerating-the-industry-growth-through-2026/>

- Therefore, according to the calculation, the **UK population** forms **15%** of the total European population.⁴⁵

TAM Calculation

- As all people in the UK have been wearing masks, shields, etc. which is Government mandatory during Covid-19.
- Therefore, from the total Europe Protective Face Masks and Shield market, we can consider **15%** as the total value as the **Total Addressable Market** in the UK.
 - In 2020, 15% of \$767.3 million = \$115.10 million
- Hence, in 2020, the **UK Protective Face Masks and Shield market** was valued at **\$115.10 million**, while it will be **increasing** approximately **3.4%** by **2021**, due to various UK Government mandatory regulations even after the launch of vaccination.
- According to our estimation, the market will **decline** slowly to **\$75 million** by **2026** at a **CAGR (-9%)** during the **forecasted period 2022-2026**.

UK Protective Face Masks and Shield Market During 2020-2026 (\$Million)



- According to a survey in Statista in 2021, approximately **65% of the people in UK** have been **wearing a face mask** outside to protect themselves and others from the coronavirus.⁶

⁴ <https://ec.europa.eu/eurostat/documents/2995521/11081093/3-10072020-AP-EN.pdf/d2f799bf-4412-05cc-a357-7b49b93615f1>

⁵ <https://www.worldometers.info/world-population/uk-population/>

⁶ <https://www.statista.com/statistics/1114248/wearing-a-face-mask-outside-in-the-uk/>

- According to an article by BBC in 2020, the UK government had invested **£14 million** on firms to make **a million face masks a week**.⁷
- The **top 5 areas for mask sales in the UK** as identified by Clinova when analyzing the thousands of orders received since the new rules were as follows:⁸
 - **London 18.8%**
 - **Yorkshire 9.2%**
 - **Surrey 7.4%**
 - **Kent 4.1%**
 - **Hampshire 3.8%**

SAM - Serviceable Available Market (UK)

Statistics

- According to a report in 2019, it was estimated that in **United Kingdom** around **1.2 million people** had been diagnosed with **COPD**.
- According to the British Lung Foundation's Respiratory Health of the Nation project in 2019, out of around **2% of the population** - 4.5% of people over 40 years live with the diagnosis of COPD.
- There had been an **increase of COPD** in the UK by **27%** during the period 2010-2019.⁹
- Presently, there have been **5.4 million people** in the **UK** receiving treatment for **asthma**.¹⁰
- **Respiratory disease** affects **one in five people** and is the third biggest cause of death in England.
- The annual economic burden of **asthma** and **COPD** on the NHS in the **UK** is estimated as **£3 billion** and **£1.9 billion** respectively.¹¹

SAM Calculation

- As 1 out of 5 people have respiratory problem in UK, therefore we estimated that in 2020, there was around 13.56 million people for the face mask and face shield in the UK.
 - **Population 2020 – (67.8 million/5) = 13.56 million**

⁷ <https://www.bbc.com/news/uk-wales-53474998>

⁸ <https://www.prnewswire.co.uk/news-releases/clinova-reveals-top-5-uk-locations-for-face-mask-sales-revealed-ahead-of-new-rules-827672535.html>

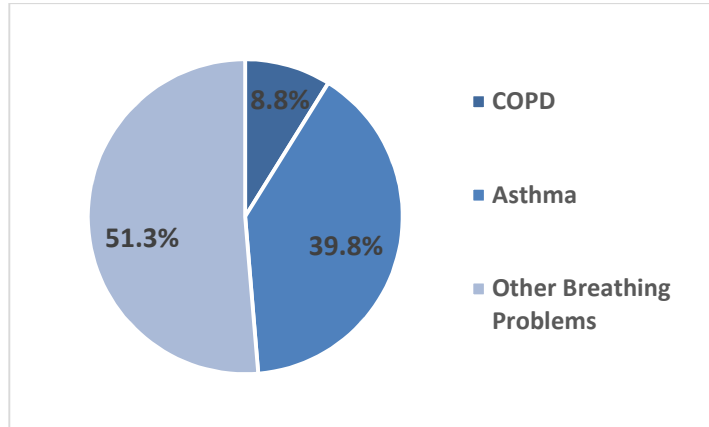
⁹ <https://www.belluscura.com/copd-in-uk/>

¹⁰ <https://www.asthma.org.uk/about/media/facts-and-statistics/>

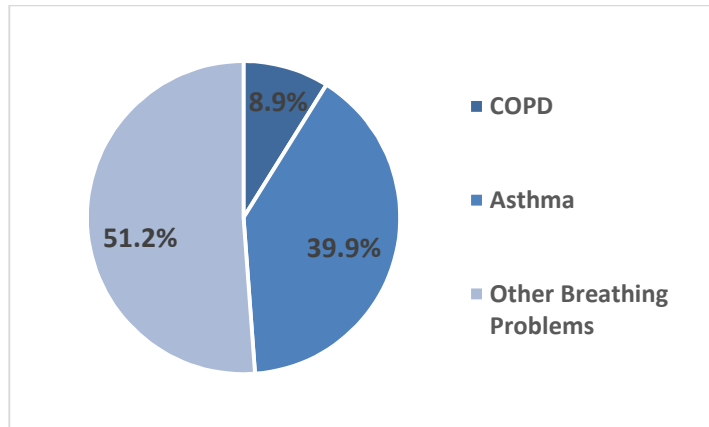
¹¹ <https://www.england.nhs.uk/ourwork/clinical-policy/respiratory-disease/>

- **Population 2021 – (67.61 million/5) = 13.52 million**
- Hence as per volume, the **SAM of protective face mask and face shield in UK was 13.56 million in 2020**, while it will be **13.52 million** by 2021.
- Whereas, the value of **SAM of protective face mask and face shield in UK was \$23.01 million** and is expected to increase to approximately **\$23.8 million** by 2021.

Number of Patients with Breathing Problems in UK for 2020



Number of Patients with Breathing Problems in UK for 2021



Conclusion

Note: The diagram represents the summary of the UK Protective Face Masks and Shield Market.

