

Market Tracking: US Medical Supply Distribution

Sep 2025

US Medical Supply Distribution

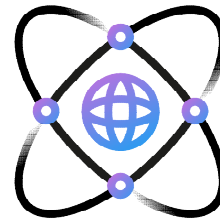
Clarivate Market Tracking

Objective: Deliver SKU-level market tracking capability for medical supplies in US distribution sales channel, built atop distributor transaction data.



Clarivate has **partnered with HIDA**, providing analytics for their long-running **distributor data program**

Clarivate **aggregates, curates, and enriches** distributor transaction data using a robust **data science approach**



Clarivate offers a **monthly data feed** to support numerous business analyses & objectives:
Growth & Share Reporting | Pricing Strategy | etc.

Data Elements



Time Period (Month)



Product Category



9 Classes of Trade



Manufacturer Name



SKU & Description



Custom & Private Label Flag

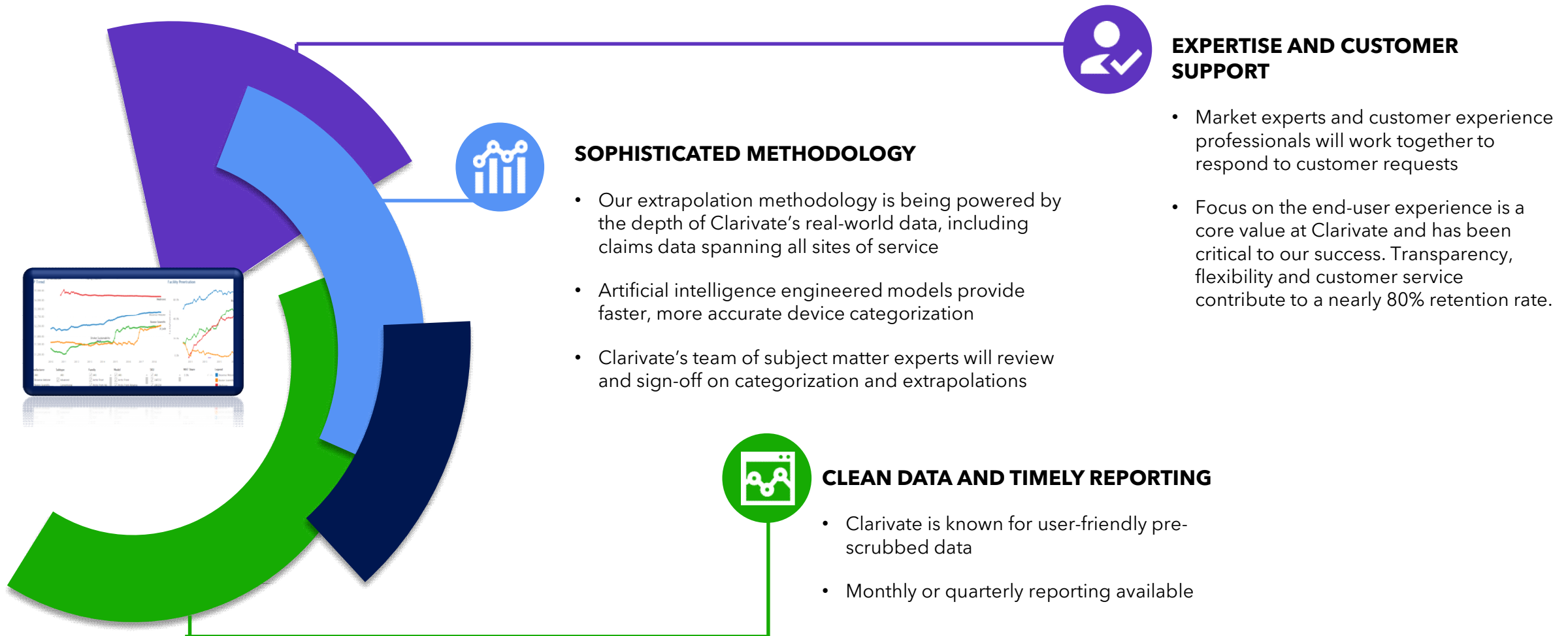


ZIP3

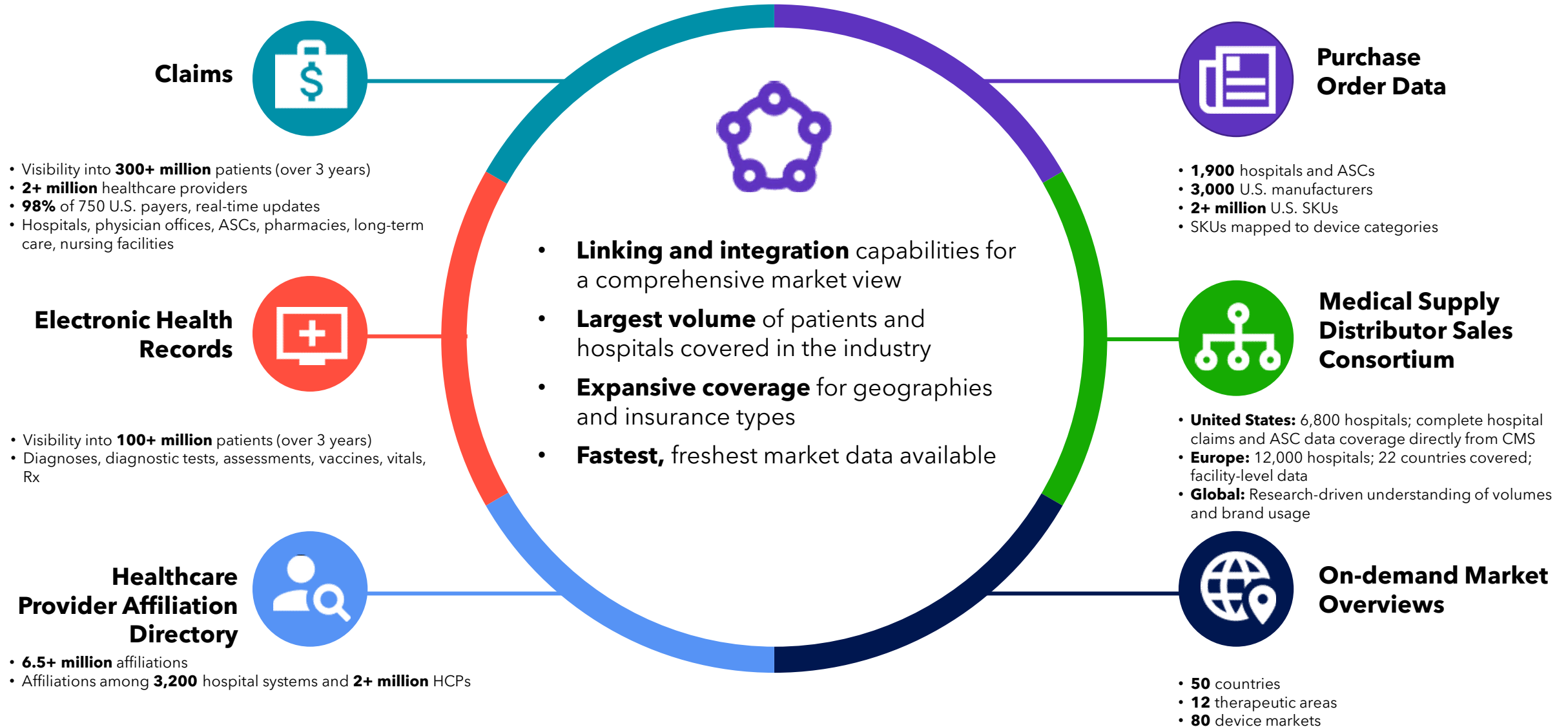


Revenue & Units

Maximize the impact of the medical supply data through Clarivate's wholistic approach

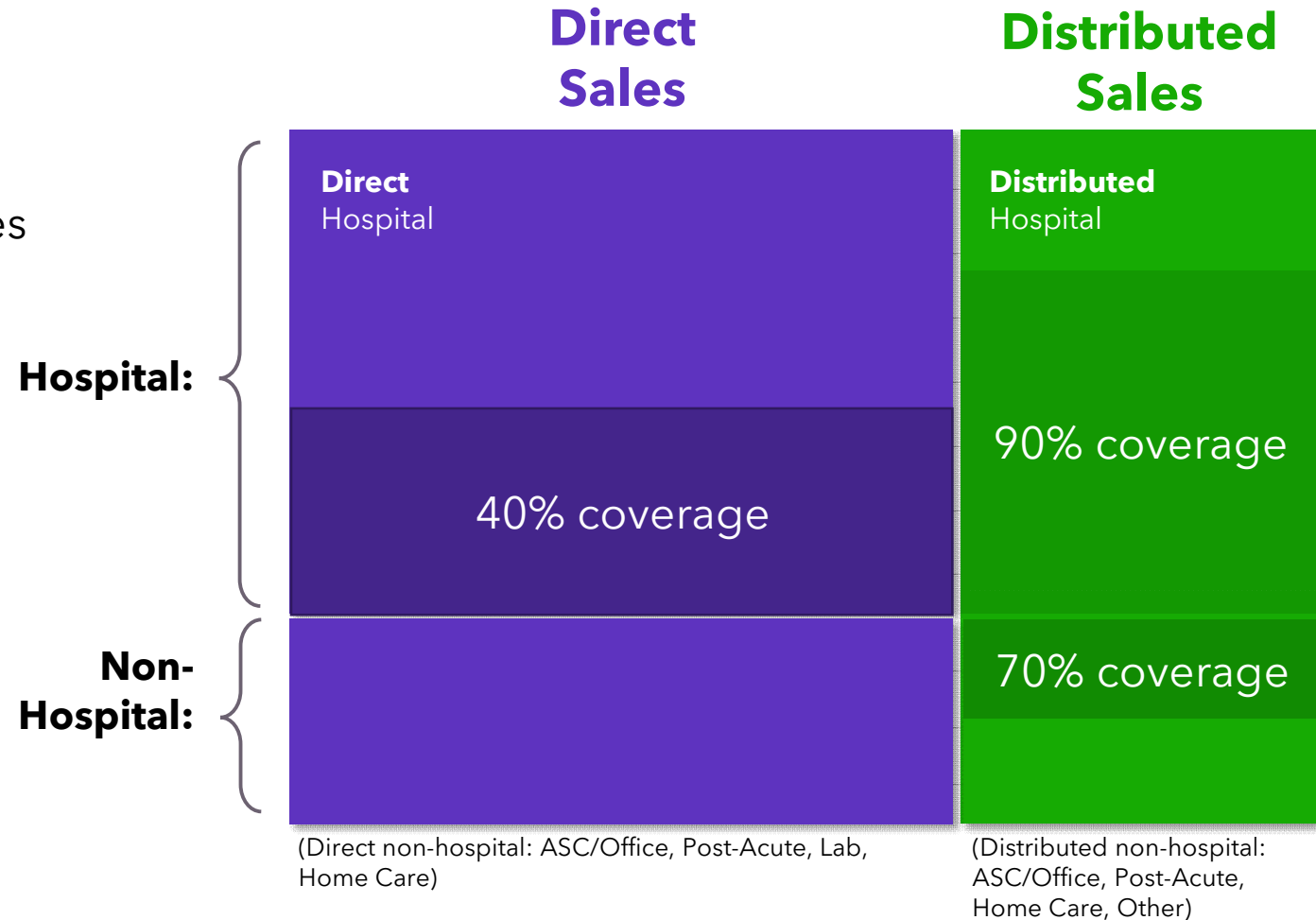


Clarivate's integrated data repository



Market Tracking: Medical supply distribution

- A consortium of leading US distributors from the US Health Industry Distributors Association (HIDA) share their monthly sales data with Clarivate, spanning all relevant Classes of Trade
- Clarivate cleans, normalizes, organizes
- **1.65M** SKUs into relevant product categories following UNSPSC taxonomy
- **9.5K+** Manufacturers
- Clarivate extrapolates data to the total distributed market
- **\$40B** annual sample size, representing **85%** of total US distribution sales



Clarivate Output & Delivery

Delivery Structure



Mechanism 1:

.CSV stack via S3

35 BD from Real-Time Reporting

COMPLETE DATASET Jan 2017 - Oct 2024	RECORD COUNT
	676.3 M
PER MONTH (Oct 2024)	8.1 M

METRICS

REVENUE

UNITS

DIMENSIONS

TIME (MONTH)

GEOGRAPHY (ZIP3)

CLASS OF TRADE

PRODUCT LABELS & FLAGS

CATEGORY (UNSPSC)

MANUFACTURER

BRAND

PRIVATE LABEL (Y/N)

PRODUCT DESCRIPTION

SKU & ITEM KEY

CUSTOM FLAG (Y/N)

Clarivate Output & Delivery

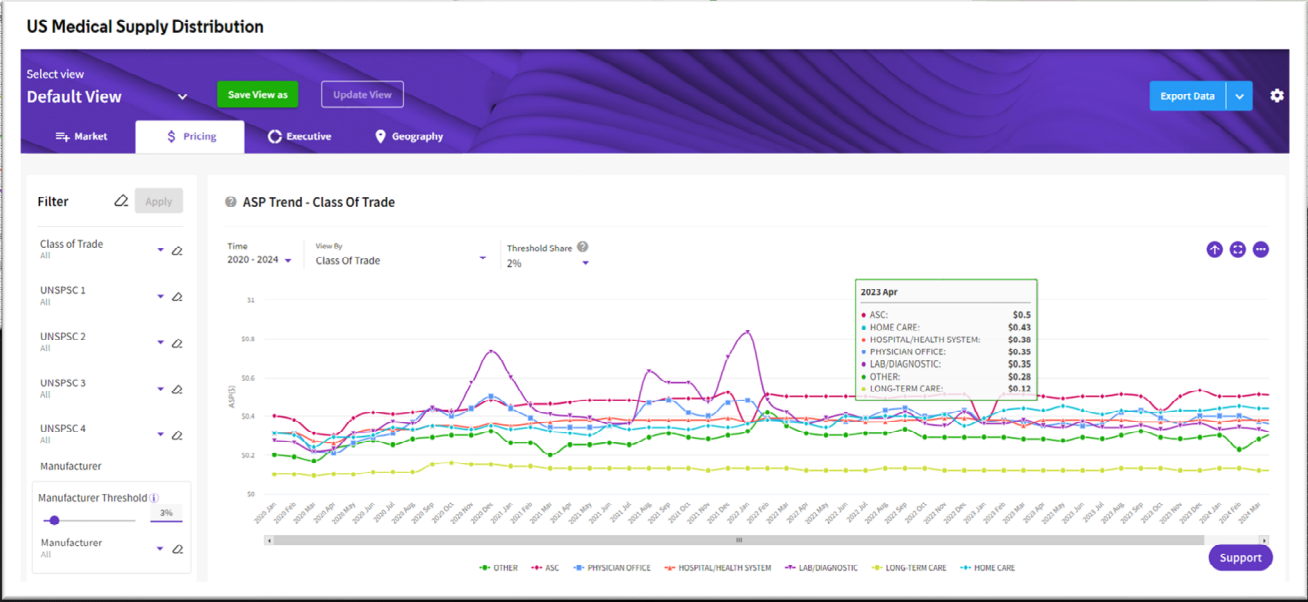
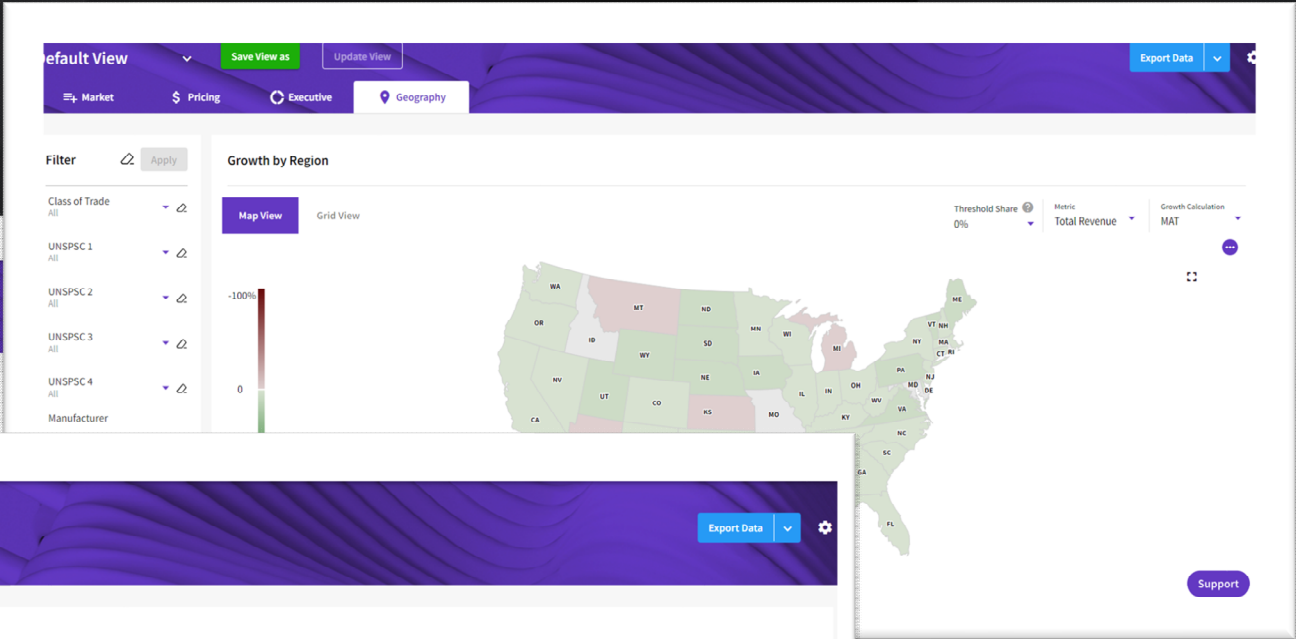
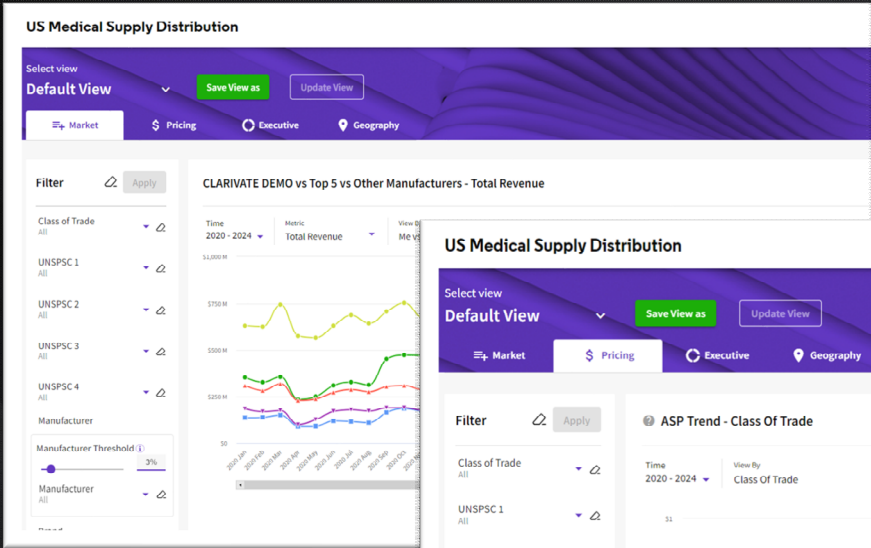
Delivery Structure



[DASHBOARD LINK](#)



Mechanism 2: Clarivate Dashboard



Data Use-Cases

Leveraging Distribution Data



DATA REPORTING

Revenue & Units, ASP, Market Share

Compare at various levels of aggregation and across time periods.

"The exam glove market grew by x% QoQ, whereas our glove distribution grew at y%"

CLASS of TRADE INSIGHT

Volume & Pricing, Market Share, Demand Shift

Compare trends & performance within and between Class-of-Trade groups. Understand procedure shift.

"There has been a shift in specific procedures from Hospital to ASC, this makes sense as volumes of surgical gowns sold into ASCs has increased."

BUSINESS CASE DEVELOPMENT

Conduct analysis to support product development and/or acquisition

"We should begin developing a specific product because there is x% growth in this segment."

PRODUCT LAUNCH SUPPORT

Conduct analyses (geographic, pricing, etc.) to inform elements of a product release or promotion strategy.

"We should consider this price-point in this Class-of-Trade because it beats the competition."

NEW ENTRY MONITORING

Identify & track specific entries by Manufacturer and SKU in a variety of markets, observe trends over time.

"Company X has released a new product, let's track uptake over the next quarter to inform our strategy."

GEOGRAPHIC ANALYSIS

Understand pricing trends by region; measure performance vs. competition at the ZIP/Facility Type level

*"In this geography we have x% share vs. our key competitor."
"Region X appears to have consistently lower pricing for Product Y."*

Appendix

US Medical Supply Distribution

Coverage Overview & Stats



Scope of Coverage



>1.65M SKUs in 9k+ Categories



9.5k+ Manufacturers Tracked



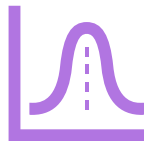
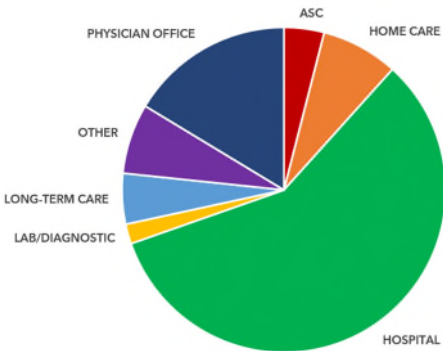
Revenue: \$57.5bn in 2023 (*distributed*)



▲ 1.6% Revenue Growth (FY23 v FY22)

Top Manufacturers \$bn

Medline Industries	10.5
Becton Dickinson	4.8
Cardinal Health	3.5
Medtronic	2.5
Johnson & Johnson	2.2



Sample Capture

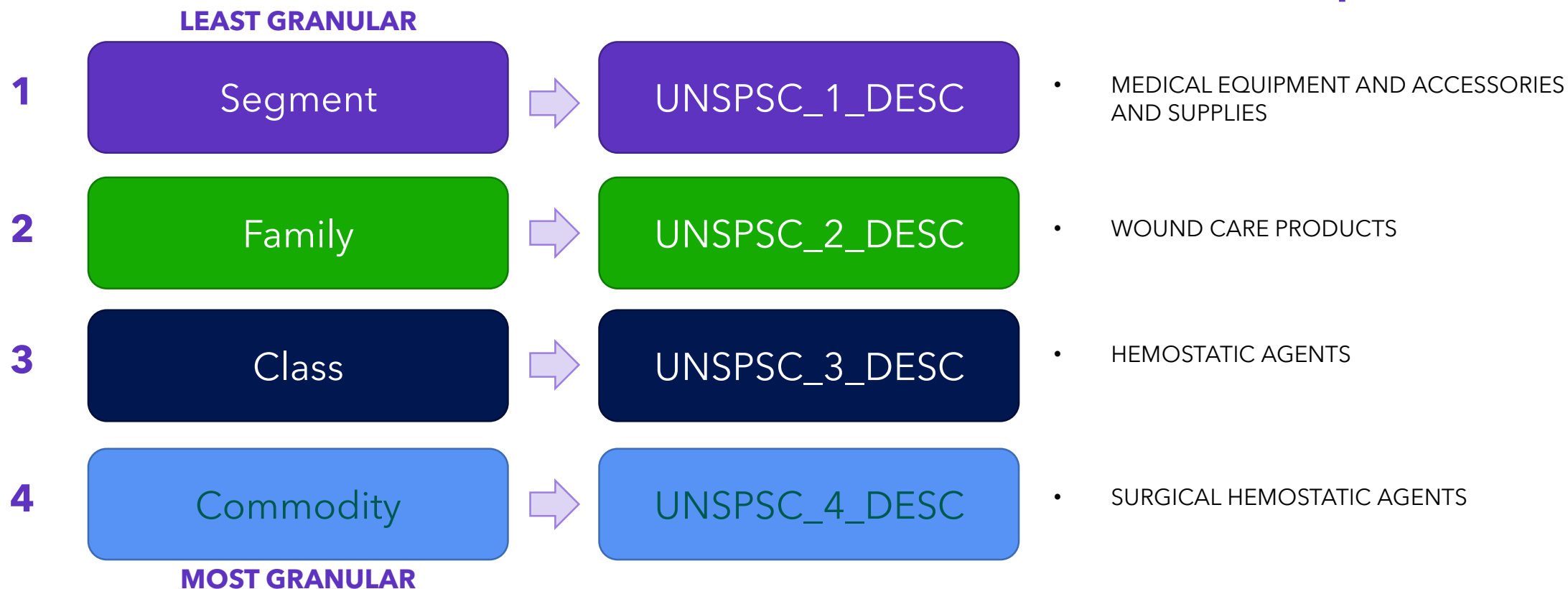
Class of Trade	% Capture*
Hospital/Health System	90%+
ASC	95%+
Lab/Diagnostic	85%+
Physician Office	90%+
Treatment Center	90%+
Long-Term Care	80%+
Home Care	55%+
Retail/Consumer	80%+
Other	85%+

*estimated % of total medical supply distribution capture in dataset

UNSPSC Taxonomy

"United Nations Standard Products and Services Code"

Example



Units & Conversion Factors

Units are reported at the “**each**” level – the lowest level of granularity that a distributor can calculate for each product. This is calculated by applying a **distributor-provided conversion factor** to each transaction.

Incoming Transactions (Illustrative)

Manufacturer	SKU	Transacted Units	Unit of Measure	Conversion Factor	Each Units
Glove Maker X	ABC123	10	CS	2,500	25,000
Glove Maker X	ABC123	15	BX	250	3,750

These totals are aggregated & extrapolated for the final delivery

Incoming unit-of-measure & conversion factor values require ongoing review to ensure high data quality; appropriate unit totals and derived ASP values. **Clarivate operates a monthly workstream to review** this data element.

Product-Level Flags

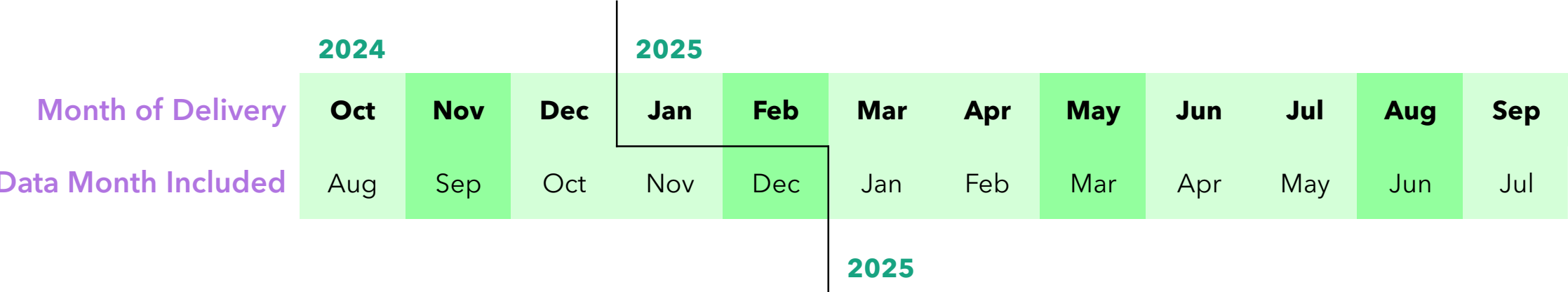
Private Label & Custom

Clarivate provides additional classification dimensions for products in dataset to provide additional detail where possible & obfuscate sensitive information where appropriate; there are two types of flags in the dataset:

1	Private Label	• Private Label is when the Distributor is selling a product under their own name or brand. We do not provide OEM name in this case, but the distributor name with a Y in this column. • Submitted monthly transaction data includes identification of private label products • .csv data files include a 'Private_Label' column (Y/N) to capture this information • Private Label products bypass extrapolation and equal the incoming sample
2	Custom Product	• Products sold by only one distributor to a unique combination of Class of Trade and Zip Code are deemed to be "custom" items • .csv data files include a 'Custom_Flag' column (Y/N) to capture this information • To avoid sharing sensitive facility information, when Custom_Flag = Y, Clarivate removes the Product Description and Unit total

Delivery Schedule

USMSD



- Note that there is an offset between data delivery month and data month reporting - our production teams target **35 business days from the end a given data period**
- Deliveries containing completed quarters are highlighted in the chart above - moving forward, **interim monthly deliveries are to be considered preliminary**, for the purpose of reviewing changes to taxonomy & revenue
- **Quarterly** deliveries will represent **final 'trued up' reporting**