

## HOGY MEDICAL at a Glance

# HOGY MEDICAL at a glance



## Features

A Pioneer in Sterilization  
for the Prevention of  
In-Hospital Infections

A Leading Company Supporting  
Operating Room Management

At HOGY MEDICAL, our mission is to prevent infections within medical facilities and to create an environment where a greater number of surgical procedures can be performed safely and efficiently.

## Three Innovations Originated Through Observation and Research of Operating Rooms



1960 onwards

Mekkin Bag  
(Sterilization pouches)



1970 onwards

Non-woven Fabric  
Products



1990 onwards

Surgical Kit

We believe that on-site observation is the source of new product development. Roughly 60 years ago, our founder frequently visited medical facilities and recognized the critical need for sterilization of medical supplies. Observing that paper was commonly used in pharmaceutical packaging at the time, he hypothesized that it could be adapted for use in sterilization, and from this idea, the Mekkin Bag was created from the ground up. As the Mekkin Bag became widely adopted, new challenges emerged, leading to the development of non-woven fabric products, which subsequently evolved into kit products.

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## Ensuring the Highest Level of Safety While Reducing Workload During Surgery

Our mainstay product, the “Premium Surgical Kit,” was developed through observation of the surgical material preparation process. It contributes significantly to reducing the workload of doctors and nurses while pursuing safer and more efficient surgery.

### Before

Preparation of medical supplies based on experience

- ✓ Supplies prepared based on individual experience
- ✓ Temporary suspension of surgery due to missing or insufficient supplies



Supplies are prepared one by one from the shelves in the surgical preparation room

**Variations in preparation time depending on the individual**

### After

Custom packages combining the materials required for each medical institution and each surgery

- ✓ Designed to meet the needs of each customer by selecting from among 20,000 components sourced from approximately 170 major domestic and international manufacturers
- ✓ Supplies can be packaged in accordance with the surgical procedure



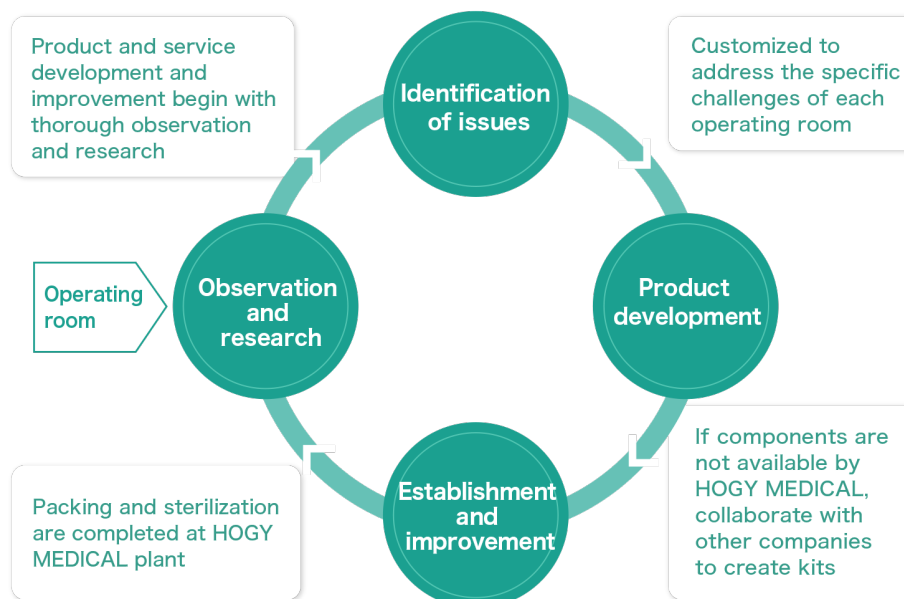
The Premium Surgical Kit packages all materials required before, during, and after surgery in the order of use

**Preparation time for surgical materials has been standardized. Reduced from approximately 69 minutes to roughly 10 minutes\***

\*Based on a case study of joint replacement surgery at Fukushima Medical University Hospital, as published in OPERA TIMES Vol. 8

## Development Process That Begins with Observation and Research

Our product development begins with observation. We observe everything that affects our customers—from the overall medical environment to the smallest challenges faced on-site—and seek to understand what is truly needed. We customize our solutions accordingly and evolve our products in collaboration with partner companies, thereby supporting the medical frontline. By continuously repeating this process, our kit products have steadily evolved.



## HOGY MEDICAL at a Glance

## Future Growth Potential

Becoming an Indispensable Presence in  
Supporting Japan's Healthcare Environment

Responding to the growing need for community-based care, and hospital bed reallocation driven by functional differentiation



Addressing the challenges faced by Japan's severe aging society, which began in 2007



Reforming surgical preparation workflows to improve productivity and support workstyle reforms for healthcare professionals

In Japan, the severe ongoing aging of the population has led to rising demand for surgical care. At the same time, there is a shortage of doctors and nurses to support surgical procedures, a challenge that is particularly acute in rural areas. We aim to support surgical teams by responding to these staffing shortages and by providing products that are finely tuned to the needs of each clinical site. Through these efforts, we are working to create an environment in which even one more patient can undergo surgery early as possible. To that end, we remain committed to the development of better products.

## Expansion of the Kit Market Overseas

Global kit market\*1

**¥1,186.1 billion**  
(2022)

2023-2030  
CAGR\*3  
8 to 9%

Kit market of Japan  
+ ASEAN target countries\*1

**¥237.6 billion**

CAGR\*3  
9 to 10%

Japan kit market\*2

**¥44.6 billion**  
(2022)

CAGR\*3  
2 to 4%

\*1. Global Sterile Surgical Procedure Pack Market 2024 by Manufacturers, Regions, Type and Application, Forecast to 2031 1 USD = 145 yen

\*2. "Medical Hygiene Products Market 2022-2023" by Yano Research Institute

\*3. CAGR figures prepared by HOGY MEDICAL based on the above \*1 and \*2 and their past data

Among ASEAN countries with strong kit market growth, we see significant potential for our products to contribute in medical settings in Thailand and Singapore, where the aging of the population is progressing, as well as in the Philippines and Malaysia, where demand for infection control is expected to expand. By establishing an integrated framework that encompasses development, manufacturing, and sales, we aim to enhance our presence in the Asian market by delivering safe, high-quality products that meet the standards recognized in Japan.

## HOGY MEDICAL at a Glance

## HOGY MEDICAL Data



Supporting  
approximately  
**1.69 million**  
surgeries annually

Number of surgical kit products sold



Over **26,000** types of  
kit products annually

Number of registered surgical kit  
product masters

Number of  
employees

**1,409**



Ratio of new  
graduate hires  
(Female)

**40%**



(Non-consolidated)

Average number of  
acquired paternity  
leave days

**164.3** days



(Non-consolidated)



Market shares of \*  
surgical kits  
**54.2%**



Client medical  
institutions  
Over **8,000**  
facilities

**64th** Anniversary



Established in **1961**



Net sales  
**¥39.1**  
billion



Equity ratio  
**75.9%**

Items not individually specified are prepared based on consolidated information as of the fiscal year ended March 2025

\*Kit product market share: "FY 2022-2023 Actual Situation in the Medical/Hygiene Product Market and Trends in Demand by Product" by Yano Research Institute Ltd.