

Medical Gloves: A Low-Priority Target for Trade

Case Study on foreign glove market for supply resilience,
hospital affordability, and practical industrial policy

Cost to hospitals

No quick reshoring

NBR is the bottleneck

Prepared by Broydrick & Associates

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Bottom line for U.S. Policymakers

If the goal is more high value, high income jobs in the U.S market, then medical gloves are a poor near-term target for new blanket trade restrictions.

- Malaysia already supplies the U.S. market at meaningful scale; squeezing that source would raise cost before it creates domestic volume
- Medical glove manufacturing is a highly commoditized, low-margin industry that depends on low-wage labor.
- The federal tariff record already points to diversion toward Malaysia away from China.
- Without more domestic NBR, new tariffs or quotas on finished gloves are a blunt and expensive lever.

Four facts that matter most

60%

Malaysia share of 2025 U.S. HS 401519 glove imports, by value.

\$88.5B

Total U.S.–Malaysia goods trade in 2025.

70%

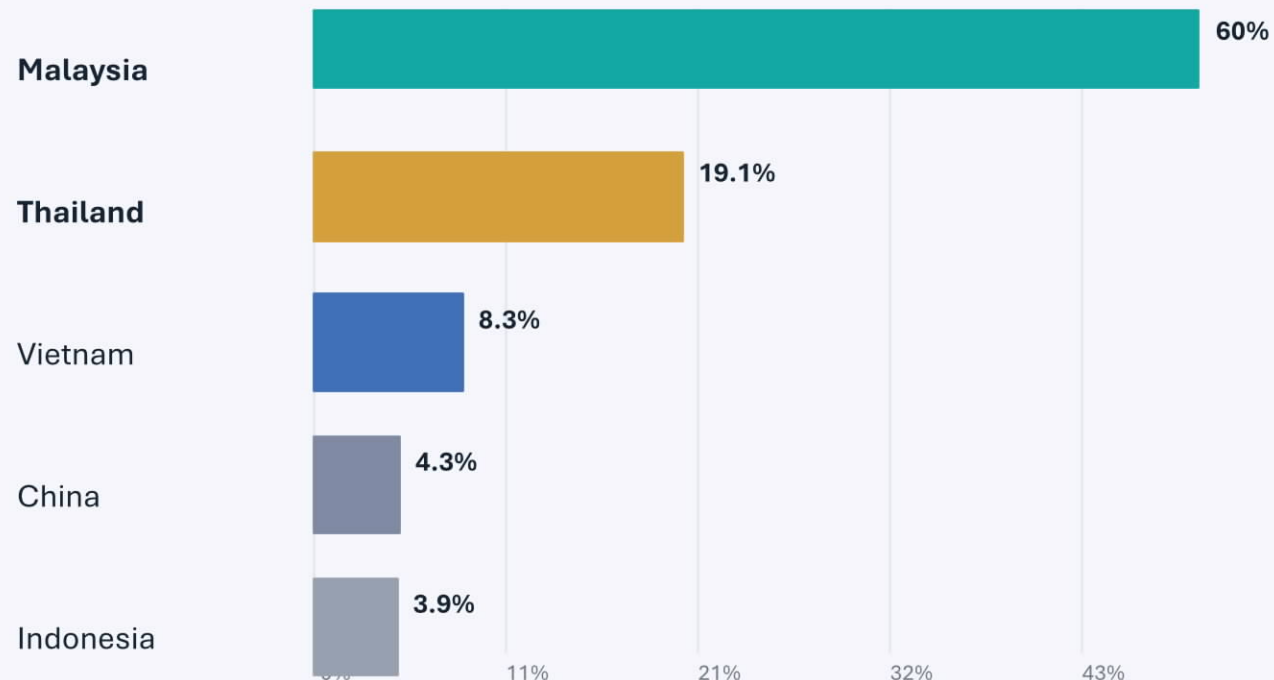
Federal waiver says nitrile gloves are 70% NBR by composition.

50%→100%

China medical-glove duties already scheduled at 50% in 2025 and 100% in 2026.

Malaysia is a Reliable Foreign Supplier in the U.S. Glove Market

2025 U.S. imports of HS 401519 gloves by value share



Source: World Bank WITS / UN Comtrade; shares calculated from 2025 U.S. import values.

Why this matters

- Malaysia alone supplied roughly 60% of the U.S. market by value in 2025.
- Malaysia and Thailand together supplied about three-quarters of U.S. imports.
- China accounted for only about 4% of 2025 U.S. imports in this category.
- If Washington adds new restrictions on Malaysia, there is no equally deep, low-cost substitute ready to absorb the gap at scale.

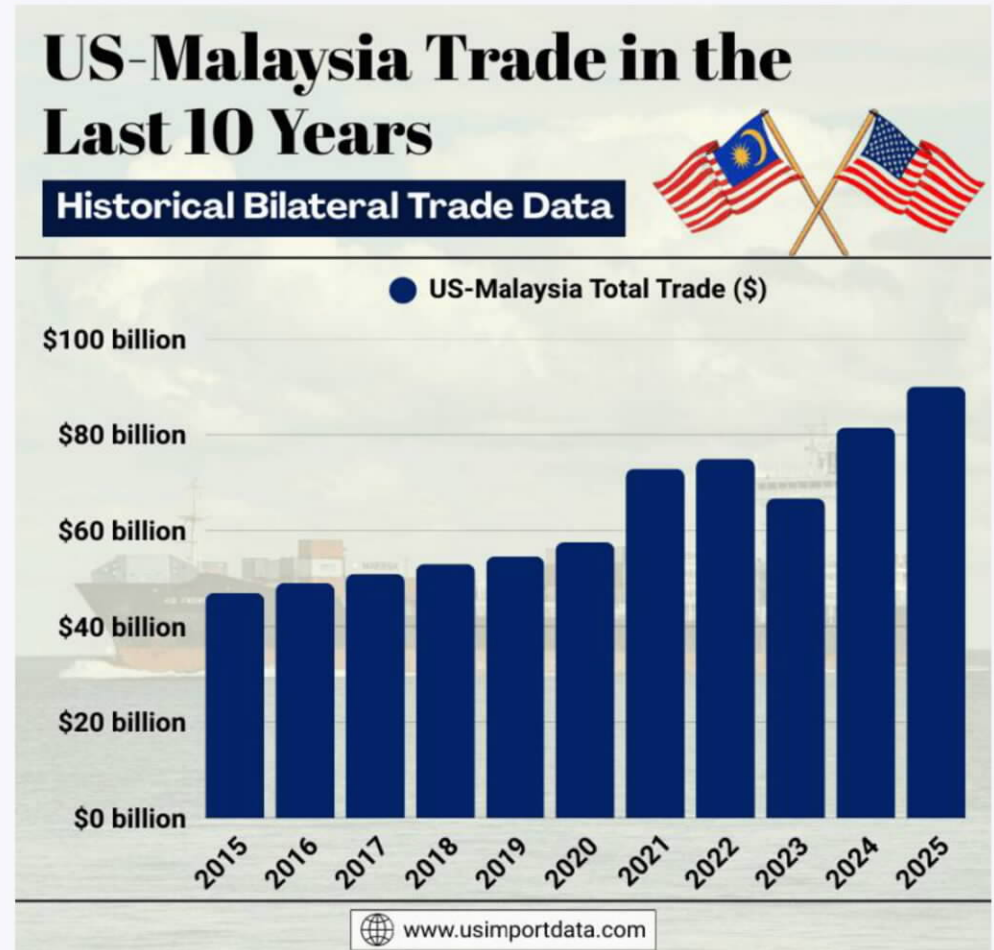
Strong U.S.–Malaysia Trade Relationship

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Trade cooperation, labor commitments, and a commercial legal system recognizable to common-law parties

Positive U.S.–Malaysia relationship

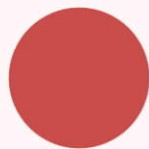
- Malaysia is an important supplier to U.S. industry and healthcare supply chains, while also buying nearly \$28.9 billion in U.S. goods in 2025.
- U.S. goods trade with Malaysia totaled an estimated \$88.5 billion in 2025.
- Malaysia bought more U.S. goods in 2025 than in 2024, with exports rising 4.5 percent year over year.
- The business climate in Malaysia is described by the State Department as generally conducive to U.S. investment.



NBR Supply Is the Foundation of the Global Glove Market



NBR is better suited for higher-value technology products than for low-margin glove manufacturing.



NBR

NIH waiver: gloves are 70% NBR and that component is not currently produced in sufficient quantities in the United States.



Glove manufacturing line

Domestic lines still depend on upstream materials.

U.S. hospitals, clinics, labs:

What providers need is dependable volume, predictable price, and qualified product—not a new squeeze on already-concentrated supply.

Patient care first

Higher Glove Costs = Higher Cost to Taxpayers

Any sustained increase in glove prices flows into Medicare and Medicaid spending.

Cost pass-through is impossible to avoid without compromising elasticity and quality

- **Gloves are a routine, non-discretionary input in hospitals, nursing homes, outpatient clinics, and labs.**
- **Providers cannot meaningfully reduce glove usage when prices rise without compromising infection control.**
- **Medicare and Medicaid ultimately pay for care that includes these supply costs, either directly or through reimbursement formulas.**



Why OMB should care

A tariff on gloves behaves like a tax on federally financed care.

The fiscal hit would arrive immediately, long before any new U.S. capacity could scale.

This is a poor target if the goal is strategic manufacturing resilience rather than higher healthcare spending.

Recommendation: Keep Medical Gloves Low Priority

Gloves score poorly on the tests that matter for a Made in America intervention.

Succinct Analysis

Near-term reshoring feasibility

LOW

Risk of higher healthcare costs

HIGH

Domestic upstream self-sufficiency today

VERY LOW

Trusted non-China alternative available

YES

Conclusion: Gloves are a POOR candidate for additional blanket tariffs or quotas



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