

Commercial Hand Dryer Market - Global Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Commercial Hand Dryer Market Report

The global commercial hand dryer market by revenue is expected to grow at a CAGR of approx. 8% during the period 2020–2026.

The global market for commercial hand dryers is undergoing several transformations. The adoption of innovative commercial hand dryer products has increased among end-users worldwide, fueled by the rising emphasis on sustainable and smart infrastructure development such as infrastructure 4.0, along with IoT. Intensifying competition among key players has led to the introduction of innovative and advanced solutions in the market.

Since the outbreak of the coronavirus pandemic across the world, there has been an increase in handwashing at homes, workplaces, and public spaces. This is because regular handwashing is one of the best weapons against the virus, which causes a flu-like respiratory illness that can prove to be fatal and spread rapidly among people across countries. Although there are hygiene norms at homes, it is critical in the public environment to promote proper hand drying solutions in toilets and washrooms to reduce the potential transmission of bacteria and viruses.

The following factors are likely to contribute to the growth of the commercial hand dryer market during the forecast period:

Focus on Reducing Energy Consumption

Enhanced Focus on Hand Hygiene

Emphasis on Infrastructure Development

A shift toward Eco-friendly Technology

The study considers the present scenario of the commercial hand dryer market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Commercial Hand Dryer Market Segmentation

In terms of revenue, hot air hand dryers dominated the market with a share of over 51% in 2020. The segment is expected to record an incremental revenue of over USD 310 million during 2020-2026. The demand expects to grow rapidly in the APAC region owing to the rising hygiene concerns and the adoption of new technologies. The APAC region projects to grow at a CAGR of over 8% during the forecast period. While the application of hot air hand dryers is universal, increasing concerns over hygiene and bacterial infections are likely to hamper the commercial hand dryer market growth.

With the growing popularity of jet air hand dryers, the segment accounted for over 48% in terms of units. The COVID-19 outbreak created turmoil in the market, which has slowed down the demand for hand dryers. Vendors are increasing awareness of hand dryers through a combination of direct advertising, niche targeting, trade shows, and holistic marketing. However, with the advent and rising popularity of digital and social media marketing, gaining customers has increased drastically.

Commercial hand dryers accounted for a share of approx. 27% in terms of revenue and volume in 2020. The retail hand dryers market expects to grow at a CAGR of approx. 9% in APAC between 2020 and 2026. Expansion of airports, coupled with metro and railway station development, is a significant factor boosting the adoption of hand dryers. The demand for long-distance rail transport has already grown and is anticipated to grow as the rail network develops in Europe and Asia. Therefore, modernization of railways offers high scope for the growth of commercial hand dryers during the forecast period.

The global commercial hands-under dryer segment expects to reach over USD 950 million by 2026. The use of these dryers is safe, which expect to drive their application during the forecast period. Although hands-under dryers are mostly conventional products, increased emphasis on innovations and technological advances influence the market growth. A major factor affecting the growth is the introduction of automatic sensor-based dryers with heat advances. Europe is expected to generate the highest revenue by 2026, followed by APAC and North America. A key strategy adopted by key players is the introduction of differentiated products and solutions for different application segments. Hence, companies strive to offer differentiated channels for distribution and a better product mix, thereby catering to target customers' changing needs and requirements. Key manufacturers are offering and expanding their product line-up to launch innovative techniques, thereby gaining an edge over their market rivals. The hands-in hand dryer segment expects to project an absolute growth of 50% in Europe during 2020?2026 by unit sales. Hands-in dryers are comparatively higher than hands-under dryers; hence their preference is considerably increased in developed regions such as Europe and North America.

The commercial hand dryer market by offline segment expects to witness an incremental revenue of over USD 600 million during 2020?2026. Vendors have promoted sales via retail stores such as specialty stores and electronic stores, although selling these devices online is increasing in recent years. The online segment in Europe is likely to reach over USD 57 million by 2026. Retail sales constituted over 92% of the distribution model in 2020. Vendors in countries such as the US primarily sell their finished products through dealers, distributors or the internet. In 2020, the retail segment was the largest revenue contributor to the global commercial hand dryer market. The online segment faces strong competition from the retail segment because of the established and growing retail network of manufacturers with mass orders, which has increased the visibility of these products on store shelves across the world. However, the online segment is witnessing high traction in the US and other APAC countries, particularly China and India.

Product

Jet Air

Hot Air

Operation

Hands-in Dryer

Hands-under Dryer

Application

Education

Hospitality

Healthcare

Commercial Spaces

Corporate Spaces

Government Spaces

Industrial

Other

Distribution

Offline

Dealers

Mass Market Players

Specialty Stores

Electronic Stores

Online

Insights by Geography

The Europe commercial hand dryer market expects to reach over USD 668 million by 2026. One of the primary reasons for the high adoption of commercial hand dryers among European households is increased per capita disposable income. The improving economy in several European countries has grown the disposable income in the population. Further, higher living standards across societies in the region and the favorable trade environment are expected to drive the Europe commercial hand dryer market share. In addition, end-users in these countries are known to have a high annual savings ratio. European customers, especially Germans and the British, realistically take advantage of retail discounting fueled by retailers' destocking as they are willing to pay more for a lavish lifestyle. This can increase the footfall in the hospitality sector, thereby fueling the demand for hand dryers in the hospitality and corporate sectors during the forecast period.

By Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

Nordic

Benelux

APAC

China

Japan

South Korea

India

Australia

Latin America

Brazil

Mexico

Argentina

Middle East & Africa

Saudi Arabia

South Africa

Turkey

UAE

Insights by Vendors

Excel Dryer, Mitsubishi Electric, Mediclinics, TOTO, and Rexnord are the prominent vendors in the commercial hand dryer market. The market has witnessed the entry of several vendors due to the high demand and the increased scope for innovations. These players compete on various factors such as price, operational efficiency, quality, eco-friendliness, and variety. However, pricing and operational efficiency are set to become a major criterion for competition among players to gain an edge over other

vendors in the market. Further, the growth of vendors depends on GDP growth and urban development. Therefore, to attain sustainability, expansion into other geographies and revival of domestic demand are essential factors for market vendors. Vendors can enhance their revenue and profitability by practicing sound production techniques that minimize product costs and mitigate associated risks. As the market demand is mainly met via dealers and distributor networks, vendors can consider developing strategic channels with prominent commercial infrastructure construction players to gain a stronghold on existing demand in the respective markets.

Prominent Vendors

Excel Dryer

Mitsubishi Electric

Mediclinics

TOTO

Rexnord (World Dryer)

Other Prominent Vendors

Aike

ASI Group

Askon Hygiene Products

Bobrick

Bardley Corporation

Comac Corporation

DIHOUR

Dyson

Electrostar

Hokwang Industries

JVD

Jaguar Group

Jie Da Electrical

Metlam Australia

Palmer Fixture

SPL

Stiebel Eltron

Lovair

Toshi Automatic Systems (TASPL)

Sloan Valve Company

KEY QUESTIONS ANSWERED:

1. How big is the commercial hand dryer market?
2. What is the growth rate of the market?
3. Who are the key players in the commercial hand dryers market?
4. Who are the major end-users of commercial hand dryers?
5. Which region is likely to generate the highest revenue during the forecast period?

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