

# Fall Protection Equipment Market - Global Outlook and Forecast 2020-2025

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## Abstracts

The global fall protection market is likely to grow at a CAGR of over 10% during the period 2019–2025.

The fall protection market is likely to witness rapid growth on account of a high number of accidents and incidences in construction, oil & gas, mining, and transportation industries. The increase in construction output and the rise in the aging workforce are likely to be other significant factors boosting the adoption of fall protection equipment. Moreover, the growing investment in renewable energies, such as wind and solar, is expected to increase demand for high-end safety equipment for workers that inspect, install, and maintain extensive infrastructures such as windmills, machines, and panels.

The construction industry accounts for the highest accidents than in other sectors. The rise in the number of infrastructure projects across the globe, especially in the US, the UAE, and China, is expected to generate awareness and demand for fall protection equipment. In the US, fall accidents are growing at an alarming rate, thereby increasing stringency in regulations. The Occupational Safety and Health Administration (OSHA) and the American National Standards Institute (ANSI) work to promote voluntary safety standards at workplaces to ensure employee safety. Government agencies and employee welfare organizations across several countries are making efforts to reduce the number of work-related accidents. Hence, the increase in campaigns and awareness programs will influence employers to install safety equipment, thereby increasing the growth of the fall protection market during the forecast period.

The following factors are likely to contribute to the growth of the fall protection market during the forecast period:

Increasing Workplace Injuries

Stringent Safety Regulations

Growing Professional Cleaning Industry

Increased Government Investments

Growth of Adventure Sports

The study considers the present scenario of the fall protection market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The study offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent companies operating in the market.

#### Fall Protection Market: Segmentation

This research report includes a detailed segmentation by product type, End-user, and geography. Soft goods comprise harnesses, body belts, lanyards, and ropes. The application of harnesses is high in construction, oil & gas, mining, and energy industries. Harnesses are in demand as they offer high safety and security. They are experiencing a high application in the mining industry. Hence, the expansion of the oil and rig industry in North America is expected to drive the demand for harnesses. Lanyards reduce free fall distance and minimize injury risks. These types of soft goods are durable and flexible, which increases their utilization in construction activities. The demand for lanyards is expected to grow due to the increasing construction activities in the APAC and North American regions. Hard goods consist of anchors, karabiner, rope grabs, and retractable blocks. Anchors are highly capable of supporting intended loads and helping in fall arrest. The application of anchors is mandatory in the mining industry as it can maximize versatility and convenience among workers. The global expansion of the mining industry is likely to bolster the demand for anchors. Rope grabs enable level and inertial locking to prevent the fall and are the preferred options for vertical and horizontal lifeline systems applied in the construction and mining industry. The increasing installation of lifeline systems in the construction and mining industry is expected to drive the growth of rope grabs. Rescue kits prevent the employee from fall accidents. Stringency in occupational safety in the US is driving the demand for rescue kits as they are mandatory for all types of work environments. Hence, the increasing application of

rescue kits due to regulatory compliance is expected to increase the revenue of the hard goods segment during the forecast period.

The construction industry is the major end-user of the fall protection system as it witnesses the highest incidences of accidents every year. The global construction industry accounts for more than one-third of workplace fatalities annually. The US, the UAE, Canada, Mexico, and China are the key countries for safety equipment in construction sites due to the high number of upcoming construction projects. As oil & gas industries are potentially more hazardous than any other industries, the exposure of physical, chemical, and biological toxins might increase the chance of falls and explosions that demand fall protection equipment. Retractable lifeline systems are widely preferred in the oil & gas industry due to high-security concerns. The growth in public investments and the probability of increased risks in workplaces are likely to trigger the demand for protective equipment. The demand is expected to be significant in countries such as Saudi Arabia and Kuwait as they are among the leading oil exporters in the world. Volatility in the mining environment is enforcing the adoption of fall safety equipment on a large scale. The demand for harnesses and belts is likely to increase as they are majorly used in the mining industry. The global mining industry is expected to grow at a rate of 3% until 2022. Thus, the demand for rescue kits, lanyards, and belts is likely to surge during the forecast period.

## Market Segmentation by Product Type

Soft Goods

Hard Goods

Installed Systems

Access Systems

Rescue Kits

Services

Others

## Market Segmentation by End-user

Construction

Mining

Oil & Gas

Energy

Transportation

Telecom & Utility

General Industry

Others

## Insights by Geography

The increasing oil and rig activities in North America is expected to boost the demand for soft goods, access systems, and rescue kits during the forecast period. In the US, strict compliance to stated regulations, including OSHA, is likely to drive the market. Moreover, the increase in commercial construction, which consists of hotels, spas, amusement parks, and recreational facilities, is expected to drive the growth of the market. Increasing infrastructural developments in the Netherlands, Denmark, and Portugal is likely to drive the market in Europe. The construction industry in the European region is expected to generate \$2,750 billion by 2023. With the rise in the number of construction projects, risks and hazards associated with employees are also estimated to rise in the coming years, thereby expecting to drive the demand for soft goods such as lanyards, ropes, harness and access systems, and rescue kits during the forecast period. The APAC region will grow at the fastest CAGR during the forecast period. The construction industry in APAC, excluding India, is estimated to reach over \$5 trillion by 2021. China's construction industry will grow over 4% by 2021 due to the development of several mega infrastructure projects, along with the construction of over 2,900 hotel projects. In the MEA region, the fall protection market is likely to grow due to significant investments in advance technology and infrastructural design. Oman, Qatar, and Kuwait are the major countries in the region, which are likely to invest tremendous growth.

## Market Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Spain

Italy

APAC

China

Japan

South Korea

India

Indonesia

Latin America

Brazil

Mexico

MEA

South Africa

Saudi Arabia

UAE

Turkey

### Insights by Vendors

The fall protection market is fragmented, with a limited number of global players earning significant revenue. The margin of success always lies in the intensity of the differentiation among the products. Factors such as price, warranty, training methods, feasible access to the trainers, and durability of the products are expected to play a vital role in highlighting the major vendors. In price-sensitive countries such as India, there is a threat from the new entrants that offer non-certified equipment at low prices. Hence, global players are facing a significant challenge to establish a diverse market base in the country. Globally, the expansion through mergers and acquisitions is likely to be effective in the fall protection market. The vendors are expected to earn revenue through training, inspection, and services in underpenetrated regions of APAC, MEA, and Latin America.

### Key Vendors

3M

Honeywell

MSA

Petzl

Pure Safety Group

### Other Vendors

SKYLOTEC GmbH

Guardian Fall

Kee Safety

Werner

FallTech

Cofra

FrenchCreek

Safe Approach

Swelock Asia

Heightsafe

Hi-Rise Access

SafetyLink

Malta Dynamics

Buckingham Manufacturing

Elk River

Sellstrom

Rigid Lifelines

## Key Market Insights

The analysis of the fall protection market provides sizing and growth opportunities for the period 2020–2025.

Provides comprehensive insights on the latest industry trends, forecast, and growth drivers in the market.

Includes a detailed analysis of growth drivers, challenges, and investment opportunities.

Delivers a complete overview of segments and the regional outlook of the market.

Offers an exhaustive summary of the vendor landscape, competitive analysis, and key strategies to gain competitive advantage.



## Contents

### **1 RESEARCH METHODOLOGY**

### **2 RESEARCH OBJECTIVES**

### **3 RESEARCH PROCESS**

### **4 SCOPE & COVERAGE**

#### 4.1 Market Definition

##### 4.1.1 Inclusions

##### 4.1.2 Exclusions

#### 4.2 Base Year

#### 4.3 Scope of The Study

#### 4.4 Market Segments

##### 4.4.1 By Product Type

##### 4.4.2 By End-user

##### 4.4.3 Market Segmentation by Geography

### **5 REPORT ASSUMPTIONS & CAVEATS**

#### 5.1 Key Caveats

#### 5.2 Currency Conversion

#### 5.3 Market Derivation

### **6 MARKET AT A GLANCE**

### **7 INTRODUCTION**

#### 7.1 Overview

### **8 MARKET OPPORTUNITIES & TRENDS**

#### 8.1 Increased Government Investments

#### 8.2 Growing Demand for Adventure Sports

### **9 MARKET GROWTH ENABLERS**

- 9.1 Increase in Workplace Injuries
- 9.2 Stringent Safety Regulations
- 9.3 Growth In Professional Cleaning Industry

## **10 MARKET GROWTH RESTRAINTS**

- 10.1 Lack of Skilled Labor
- 10.2 Use of Substandard Products

## **11 MARKET LANDSCAPE**

- 11.1 Market Overview
- 11.2 Market Size & Forecast
- 11.3 Five Forces Analysis
  - 11.3.1 Threat of New Entrants
  - 11.3.2 Bargaining Power of Suppliers
  - 11.3.3 Bargaining Power of Buyers
  - 11.3.4 Threat of Substitutes
  - 11.3.5 Competitive Rivalry

## **12 PRODUCT TYPE**

- 12.1 Market Snapshot & Growth Engine
- 12.2 Market Overview

## **13 SOFT GOODS**

- 13.1 Market Snapshot & Growth Engine
- 13.3 Market Size & Forecast
- 13.4 Soft Goods by Geography
  - 13.4.1 Market Size & Forecast
- 13.5 Soft Goods by Type
  - 13.5.1 Market Size & Forecast
- 13.6 Harnesses
  - 13.6.1 Market Size & Forecast
- 13.7 Body Belts
  - 13.7.1 Market Size & Forecast
- 13.8 Lanyards

- 13.8.1 Market Size & Forecast
- 13.9 Ropes
  - 13.9.1 Market Size & Forecast

## **14 HARD GOODS**

- 14.1 Market Snapshot & Growth Engine
- 14.3 Market Size & Forecast
- 14.4 Hard Goods by Geography
  - 14.4.1 Market Size & Forecast
- 14.5 Hard Goods by Type
  - 14.5.1 Market Size & Forecast
- 14.6 Anchors
  - 14.6.1 Market Size & Forecast
- 14.7 Karabiners
  - 14.7.1 Market Size & Forecast
- 14.8 Rope Grabs
  - 14.8.1 Market Size & Forecast
- 14.9 Retractable Blocks
  - 14.9.1 Market Size & Forecast

## **15 RESCUE KITS**

- 15.1 Market Size & Forecast
- 15.2 Rescue Kits by Geography
  - 15.2.1 Market Size & Forecast (Revenue)

## **16 INSTALLED SYSTEMS**

- 16.1 Market Snapshot & Growth Engine
- 16.2 Market Size & Forecast
- 16.3 Installed Systems by Geography
  - 16.3.1 Market Size & Forecast
- 16.4 Installed Systems by Type
  - 16.4.1 Market Size & Forecast
- 16.5 Horizontal Lifeline Systems
  - 16.5.1 Market Size & Forecast
- 16.6 Vertical Lifeline Systems
  - 16.6.1 Market Size & Forecast

## **17 ACCESS SYSTEMS**

- 17.1 Market Size & Forecast
- 17.2 Access Systems Market by Geography
  - 17.2.1 Market Size & Forecast

## **18 SERVICES**

- 18.1 Market Snapshot & Growth Engine
- 18.2 Market Size & Forecast
- 18.3 Services by Geography
  - 18.3.1 Market Size & Forecast
- 18.4 Services By Type
  - 18.4.1 Market Size & Forecast
  - 18.4.2 Training: Market Size & Forecast
  - 18.4.3 Inspection: Market Size & Forecast

## **19 OTHERS**

- 19.1 Market Snapshot & Growth Engine
- 19.2 Market Size & Forecast
- 19.3 Other Equipment by Geography
  - 19.3.1 Market Size & Forecast
- 19.4 Other Equipment by Type
  - 19.4.1 Market Size & Forecast
  - 19.4.2 Guardrails: Market Size & Forecast
  - 19.4.3 Nettings: Market Size & Forecast

## **20 END-USER**

- 20.1 Market Snapshot & Growth Engine
- 20.2 Market Overview
- 20.3 Construction
  - 20.3.1 Market Size & Forecast
  - 20.3.2 Construction Industry by Geography: Market Size & Forecast
- 20.4 Oil & Gas
  - 20.4.1 Market Size & Forecast
  - 20.4.2 Oil & Gas Industry by Geography: Market Size & Forecast

## 20.5 Mining

20.5.1 Market Size & Forecast

20.5.2 Mining Industry by Geography: Market Size & Forecast

## 20.6 General Industry

20.6.1 Market Size & Forecast

20.6.2 General Industry by Geography: Market Size & Forecast

## 20.7 Energy

20.7.1 Market Size & Forecast

20.7.2 Energy Industry by Geography: Market Size & Forecast

## 20.8 Transportation

20.8.1 Market Size & Forecast

20.8.2 Transportation Industry by Geography: Market Size & Forecast

## 20.9 Telecom & Utility

20.9.1 Market Size & Forecast

20.9.2 Telecom & Utility Industry by Geography: Market Size & Forecast

## 20.10 Other Industries

20.10.1 Market Size & Forecast

20.10.2 Other Industries by Geography: Market Size & Geography

## **21 GEOGRAPHY**

21.1 Geography Snapshot & Growth Engine

21.2 Geography Overview

## **22 NORTH AMERICA**

22.1 Market Size & Forecast

22.2 Segmentation by End-User Type

22.2.1 Market Size & Forecast (Revenue)

22.3 Segmentation by Product Type

22.3.1 Market Size & Forecast (Revenue)

22.4 Key Countries Snapshot

22.4.1 US: Market Size & Forecast

22.4.2 Canada: Market Size & Forecast

## **23 EUROPE**

23.1 Market Size & Forecast

23.2 Segmentation by End-User Type

- 23.2.1 Market Size & Forecast
- 23.3 Segmentation by Product Type
  - 23.3.1 Market Size & Forecast
- 23.4 Key Countries Snapshot
  - 23.4.1 UK: Market Size & Forecast
  - 23.4.2 Germany: Market Size & Forecast
  - 23.4.3 France: Market Size & Forecast
  - 23.4.4 Spain: Market Size & Forecast
  - 23.4.5 Italy: Market Size & Forecast

## **24 APAC**

- 24.1 Market Size & Forecast
- 24.2 Segmentation by End-User Type
  - 24.2.1 Market Size & Forecast
- 24.3 Segmentation by Product Type
  - 24.3.1 Market Size & Forecast
- 24.4 Key Countries Snapshot
  - 24.4.1 China: Market Size & Forecast
  - 24.4.2 Japan: Market Size & Forecast
  - 24.4.3 South Korea: Market Size & Forecast
  - 24.4.4 India: Market Size & Forecast
  - 24.4.5 Indonesia: Market Size & Forecast

## **25 LATIN AMERICA**

- 25.1 Market Size & Forecast
- 25.2 Segmentation by End-User Type
  - 25.2.1 Market Size & Forecast
- 25.3 Segmentation by Product Type
  - 25.3.1 Market Size & Forecast
- 25.4 Key Countries Snapshot
  - 25.4.1 Brazil: Market Size & Forecast
  - 25.4.2 Mexico: Market Size & Forecast

## **26 MIDDLE EAST & AFRICA**

- 26.1 Market Size & Forecast
- 26.2 Segmentation by End-User Type

- 26.2.1 Market Size & Forecast
- 26.3 Segmentation by Product Type
  - 26.3.1 Market Size & Forecast
- 26.4 Key Countries Snapshot
  - 26.4.1 South Africa: Market Size & Forecast
  - 26.4.2 Saudi Arabia: Market Size & Forecast
  - 26.4.3 UAE: Market Size & Forecast
  - 26.4.4 Turkey: Market Size & Forecast

## **27 COMPETITIVE LANDSCAPE**

- 27.1 Competitive Overview
- 27.2 Strategic Recommendations

## **28 KEY VENDORS**

- 28.1 3M
  - 28.1.1 Overview
  - 28.1.2 Product Offerings
  - 28.1.3 Key Strengths
  - 28.1.4 Key Strategies
  - 28.1.5 Key Opportunities
- 28.2 Honeywell
  - 28.2.1 Overview
  - 28.2.2 Product Offerings
  - 28.2.3 Key Strengths
  - 28.2.4 Key Strategies
  - 28.2.5 Key Opportunities
- 28.3 MSA
  - 28.3.1 Overview
  - 28.3.2 Product Offerings
  - 28.3.3 Key Strengths
  - 28.3.4 Key Strategies
  - 28.3.5 Key Opportunities
- 28.4 PETZL
  - 28.4.1 Overview
  - 28.4.2 Product Offerings
  - 28.4.3 Key Strengths
  - 28.4.4 Key Strategies

- 28.4.5 Key Opportunities
- 28.5 Pure Safety Group
  - 28.5.1 Overview
  - 28.5.2 Product Offerings
  - 28.5.3 Key Strengths
  - 28.5.4 Key Strategies
  - 28.5.5 Key Opportunities

## **29 OTHER PROMINENT VENDORS**

- 29.1 Skylotec Gmbh
  - 29.1.1 Overview
  - 29.1.2 Product Offerings
- 29.2 Guardian Fall
  - 29.2.1 Overview
  - 29.2.2 Product Offerings
- 29.3 Kee Safety
  - 29.3.1 Overview
  - 29.3.2 Product Offerings
- 29.4 Werner
  - 29.4.1 Overview
  - 29.4.2 Product Offerings
- 29.5 Falltech
  - 29.5.1 Overview
  - 29.5.2 Product Offerings
- 29.6 COFRA
  - 29.6.1 Overview
  - 29.6.2 Product Offerings
- 29.7 Frenchcreek
  - 29.7.1 Overview
  - 29.7.2 Product Offerings
- 29.8 Safe Approach
  - 29.8.1 Overview
  - 29.8.2 Product Offerings
- 29.9 Swelock Asia
  - 29.9.1 Overview
  - 29.9.2 Products Offerings
- 29.10 Heightsafe
  - 29.10.1 Overview



- 29.10.2 Product Offerings
- 29.11 Hi-Rise Access
  - 29.11.1 Overview
  - 29.11.2 Product Offerings
- 29.12 Safetylink
  - 29.12.1 Overview
  - 29.12.2 Product Offerings
- 29.13 Malta Dynamics
  - 29.13.1 Overview
  - 29.13.2 Product Offerings
- 29.14 Buckingham Manufacturing
  - 29.14.1 Overview
  - 29.14.2 Product Offerings
- 29.15 ELK RIVER
  - 29.15.1 Overview
  - 29.15.2 Product Offerings
- 29.16 Sellstrom
  - 29.16.1 Overview
  - 29.16.2 Product Offerings

## **30 REPORT SUMMARY**

- 30.1 Key Takeaways

## **31 QUANTITATIVE SUMMARY**

- 31.1 Global Market
- 31.2 Product Type
  - 31.2.1 Soft Goods Market by Product
  - 31.2.2 Soft Goods Market by Geography
  - 31.2.3 Hard Goods Market by Product
  - 31.2.4 Hard Goods Market by Geography
  - 31.2.5 Rescue Kits Market by Geography
  - 31.2.6 Installed Systems Market by Type
  - 31.2.7 Installed Systems Market by Geography
  - 31.2.8 Access Systems Market by Geography
  - 31.2.9 Services Market by Type
  - 31.2.10 Services Market by Geography
  - 31.2.11 Other Equipment Market by Types

### 31.2.12 Other Equipment Market by Geography

#### 31.3 End-User

31.3.1 Construction Industry

31.3.2 Oil & Gas Industry

31.3.3 Mining Industry

31.3.4 General Industry

31.3.5 Energy Industry

31.3.6 Transportation Industry

31.3.7 Telecom & Utility Industry

31.3.8 Other Industries

#### 31.4 North America

31.4.1 Product Type

31.4.2 End-User Type

#### 31.5 Europe

31.5.1 Product Type

31.5.2 End-User Type

#### 31.6 APAC

31.6.1 Product Type

31.6.2 End-User Type

#### 31.7 Latin America

31.7.1 Product Type

31.7.2 End-User Type

#### 31.8 Middle East Africa

31.8.1 Product Type

31.8.2 End-User Type

## **32 APPENDIX**

### 32.1 Abbreviations

## List Of Exhibits

### LIST OF EXHIBITS

- Exhibit 1 Segmentation of Global Fall Protection Equipment Market
- Exhibit 2 Market Size Calculation Approach 2019
- Exhibit 3 Common Fall Protection Methods
- Exhibit 4 Lifecycle Placement of Fall Protection Equipment Market 2019
- Exhibit 5 Fall-Related Construction Worker Deaths in US due to Impact of PPE (2019)
- Exhibit 6 Impact of Increased Government Investments
- Exhibit 7 Share of Government/SOE Ownership in Energy Investment by Sector 2012 & 2019 (%)
- Exhibit 8 Global Investment Needs by Sector 2016–2040 (% share)
- Exhibit 9 Impact of Growing Demand for Adventure Sports
- Exhibit 10 Impact of Increase in Workplace Injuries
- Exhibit 11 Fatal Occupational Injuries by Industry in US 2017–2018
- Exhibit 12 Impact of Stringent Safety Regulations
- Exhibit 13 Impact of Growth in Professional Cleaning Industry
- Exhibit 14 Impact of Lack of Skilled Labor
- Exhibit 15 Impact of Use Substandard Products
- Exhibit 16 Global Fall Protection Equipment Market Overview 2019–2025
- Exhibit 17 Global Fall Protection Equipment Market 2019–2025 (\$ million)
- Exhibit 18 Global Fall Protection Equipment Market Overview 2019–2025
- Exhibit 19 End-User Contribution of Fall Protection Equipment Market by Revenue 2019 (\$ billion)
- Exhibit 20 Five Forces Analysis 2019
- Exhibit 21 Incremental Growth by Product Type 2019 & 2025
- Exhibit 22 Global Fall Protection Equipment by Product Type 2019 and 2025 (% share)
- Exhibit 23 Incremental Growth of Fall Protection Equipment Market by Product Type 2019–2025
- Exhibit 24 Incremental Growth by Product Type 2019 & 2025
- Exhibit 25 Global Fall Protection Soft Goods Market 2019–2025 (\$ million)
- Exhibit 26 Global Fall Protection Soft Goods Market by Type 2019–2025 (% share)
- Exhibit 27 Global Fall Protection Soft Goods Market 2019–2025 (\$ million)
- Exhibit 28 Global Harness Market 2019 – 2025 (\$ million)
- Exhibit 29 Global Body Belts Market 2019 – 2025 (\$ million)
- Exhibit 30 Global Lanyards Market 2019 – 2025 (\$ million)
- Exhibit 31 Global Ropes Market 2019 – 2025 (\$ million)
- Exhibit 32 Incremental Growth by Product Type 2019 & 2025

- Exhibit 33 Global Fall Protection Hard Goods Market 2019–2025 (\$ million)
- Exhibit 34 Global Fall Equipment Hard Goods Market Overview 2019 (\$ million)
- Exhibit 35 Global Anchors Market 2019 – 2025 (\$ million)
- Exhibit 36 Global Karabiners Market 2019 – 2025 (\$ million)
- Exhibit 37 Global Rope Grabs Market 2019 – 2025 (\$ million)
- Exhibit 38 Global Retractable Blocks Market 2019 – 2025 (\$ million)
- Exhibit 39 Global Fall Protection Rescue Kits Market 2019–2025 (\$ million)
- Exhibit 40 Incremental Growth by Product Type 2019 & 2025
- Exhibit 41 Global Fall Protection Installed Systems Market 2019–2025 (\$ million)
- Exhibit 42 Global Fall Protection Installed Systems Market by Type 2019 (\$ million)
- Exhibit 43 Global Horizontal Lifeline Systems Market 2019 – 2025 (\$ million)
- Exhibit 44 Global Vertical Lifeline Systems Market 2019 – 2025 (\$ million)
- Exhibit 45 Global Fall Protection Access Systems Market 2019–2025 (\$ million)
- Exhibit 46 Incremental Growth by Product Type 2019 & 2025
- Exhibit 47 Global Fall Protection Services Market 2019–2025 (\$ million)
- Exhibit 48 Services Market by Type 2019 (% share)
- Exhibit 49 Global Training Market 2019 – 2025 (\$ million)
- Exhibit 50 Global Inspection Market 2019 – 2025 (\$ million)
- Exhibit 51 Incremental Growth by Product Type 2019 & 2025
- Exhibit 52 Global Fall Protection Other Equipment Market 2019–2025 (\$ million)
- Exhibit 53 Other Equipment Market by Type 2019 (\$ revenue)
- Exhibit 54 Global Guardrails Market 2019 – 2025 (\$ million)
- Exhibit 55 Global Nettings Market 2019 – 2025 (\$ million)
- Exhibit 56 Incremental Growth by End-user 2019 & 2025
- Exhibit 57 Global Fall Protection Equipment Market by End-User 2019 and 2025 (% share)
- Exhibit 58 Incremental Growth of Fall Protection Equipment by End-User Type 2019–2025
- Exhibit 59 Global Fall Protection Construction Equipment Market 2019–2025 (\$ million)
- Exhibit 60 Global Fall Protection Oil & Gas Equipment Market 2019–2025 (\$ million)
- Exhibit 61 Global Fall Protection Mining Equipment Market 2019–2025 (\$ million)
- Exhibit 62 Global Fall Protection General Equipment Market 2019–2025 (\$ million)
- Exhibit 63 Global Fall Protection Energy Equipment Market 2019–2025 (\$ million)
- Exhibit 64 Global Fall Protection Transportation Equipment Market 2019–2025 (\$ million)
- Exhibit 65 Global Fall Protection Telecom & Utility Equipment Market 2019–2025 (\$ million)
- Exhibit 66 Global Fall Equipment Other Equipment Market 2019–2025 (\$ million)
- Exhibit 67 Incremental Growth by Geography 2019 & 2025 (Revenue)

- Exhibit 68 Global Fall Protection Equipment Market by Revenue 2019 (% share)
- Exhibit 69 Regional Contribution of Fall Protection Equipment Market by Revenue 2019 (\$ billion)
- Exhibit 70 Fall Protection Equipment Market in North America 2019?2025 (\$ million)
- Exhibit 71 Estimated Worth of Construction Activities in US 2019?2023 (\$)
- Exhibit 72 Incremental Growth by Countries 2019 & 2025 (Revenue)
- Exhibit 73 Fall Protection Equipment Market in US 2019?2025 (\$ million)
- Exhibit 74 Fall Protection Equipment Market in Canada 2019?2025 (\$ million)
- Exhibit 75 Fall Protection Equipment Market in Europe 2019?2025 (\$ million)
- Exhibit 76 Major Causes for Workplace Accidents in UK 2018?2019
- Exhibit 77 Growth Rate of Construction Industry in Western Europe 2019
- Exhibit 78 Incremental Growth in Countries 2019 & 2025 (Revenue)
- Exhibit 79 Fall Protection Equipment Market in UK 2019?2025 (\$ million)
- Exhibit 80 Fall Protection Equipment Market in Germany 2019?2025 (\$ million)
- Exhibit 81 Fall Protection Equipment Market in France 2019?2025 (\$ million)
- Exhibit 82 Government Spending on Transportation Infrastructure 2019?2022 (\$ billion)
- Exhibit 83 Fall Protection Equipment Market in Spain 2019?2025 (\$ million)
- Exhibit 84 Fall Protection Equipment Market in Italy 2019?2025 (\$ million)
- Exhibit 85 Fall Protection Equipment Market in APAC 2019?2025 (\$ million)
- Exhibit 86 Renewable Energy Forecast in APAC Countries for 2025 (megawatts)
- Exhibit 87 Incremental Growth in Countries 2019 & 2025 (Revenue)
- Exhibit 88 Fall Protection Equipment Market in China 2019?2025 (\$ million)
- Exhibit 89 Work Accidents in China by Industry (Jan?Oct 2019)
- Exhibit 90 Fall Protection Equipment Market in Japan 2019?2025 (\$ million)
- Exhibit 91 Fall Protection Equipment Market in South Korea 2019?2025 (\$ million)
- Exhibit 92 Fall Protection Equipment Market in India 2019?2025 (\$ million)
- Exhibit 93 Fall Protection Equipment Market in Indonesia 2019?2025 (\$ million)
- Exhibit 94 Fall Protection Equipment Market in Latin America 2019?2025 (\$ million)
- Exhibit 95 Construction Industry Value in Latin America 2019?2023 (\$ billion)
- Exhibit 96 Incremental Growth in Countries 2019 & 2025 (Revenue)
- Exhibit 97 Fall Protection Equipment Market in Brazil 2019?2025 (\$ million)
- Exhibit 98 Fall Protection Equipment Market in Mexico 2019?2025 (\$ million)
- Exhibit 99 Fall Protection Equipment Market in MEA 2019?2025 (\$ million)
- Exhibit 100 Incremental Growth in Countries 2019 & 2025 (Revenue)
- Exhibit 101 Fall Protection Equipment Market in South Africa 2019?2025 (\$ million)
- Exhibit 102 Fall Protection Equipment Market in Saudi Arabia 2019-2025 (\$ million)
- Exhibit 103 Fall Protection Equipment Market in UAE 2019?2025 (\$ million)
- Exhibit 104 Fall Protection Equipment Market in Turkey 2019?2025 (\$ million)
- Exhibit 105 Global Fall Protection Equipment by Product Type 2019?2025 (\$ million)



## List Of Tables

### LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2014-2019

Table 3 Workplace Deaths in US 2017

Table 4 Global Fall Protection Market by Product Type 2019-2025 (\$ million)

Table 5 Global Fall Protection Soft Goods Market by Geography 2019-2025 (\$ million)

Table 6 Global Fall Protection Hard Goods Market by Geography 2019-2025 (\$ million)

Table 7 Global Fall Protection Hard Goods Market by Type 2019-2025 (\$ million)

Table 8 Global Fall Protection Rescue Kits Market by Geography 2019-2025 (\$ million)

Table 9 Global Fall Protection Installed Systems Market by Geography 2019-2025 (\$ million)

Table 10 Global Fall Protection Installed Systems Market by Type 2019-2025 (\$ million)

Table 11 Types of Access Systems with End-user Industries

Table 12 Global Fall Protection Access Systems Market by Geography 2019-2025 (\$ million)

Table 13 Global Fall Protection Services Market by Geography 2019-2025 (\$ million)

Table 14 Global Fall Protection Services Market by Type 2019-2025 (\$ million)

Table 15 Global Fall Protection Other Equipment Market by Geography 2019-2025 (\$ million)

Table 16 Global Fall Protection Other Equipment Market by Type 2019-2025 (\$ million)

Table 17 Global Fall Protection Equipment Market by End-users 2019-2025 (\$ million)

Table 18 Market in Construction Industry by Geography 2019-2025 (\$ million)

Table 19 Market in Oil & Gas Industry by Geography 2019-2025 (\$ million)

Table 20 Upcoming Mines with Countries

Table 21 Market in Mining Industry by Geography 2019-2025 (\$ million)

Table 22 Market in General Industry by Geography 2019-2025 (\$ million)

Table 23 Market in Energy Industry by Geography 2019-2025 (\$ million)

Table 24 Market in Transportation Industry by Geography 2019-2025 (\$ million)

Table 25 Market in Telecom & Utility Industry by Geography 2019-2025 (\$ million)

Table 26 Market in Other Industries by Geography 2019-2025 (\$ million)

Table 27 Global Fall Protection Equipment Market by Geography 2019-2025 (\$ million)

Table 28 North America Market by End User Type 2019-2025 (\$ million)

Table 29 North America Market by Product Type 2019-2025 (\$ million)

Table 30 Europe Market by End-User Type 2019-2025 (\$ million)

Table 31 Europe Market by Product Type 2019-2025 (\$ million)

Table 32 Upcoming Infrastructural Projects in India

- Table 33 APAC Market by End User Type 2019–2025 (\$ million)
- Table 34 APAC Market by Product Type 2019–2025 (\$ million)
- Table 35 Latin America Market by End-User Type 2019–2025 (\$ million)
- Table 36 Latin America Market by Product Type 2019–2025 (\$ million)
- Table 37 MEA Market by End-User Type 2019–2025 (\$ million)
- Table 38 MEA Market by Product Type 2019–2025 (\$ million)
- Table 39 3M: Key Product Offerings
- Table 40 Honeywell: Key Product Offerings
- Table 41 MSA: Key Product Offerings
- Table 42 Petzl: Key Product Offerings
- Table 43 Pure Safety Group: Key Product Offerings
- Table 44 SKYLOTEC: Key Product Offerings
- Table 45 Guardian Fall: Key Product Offerings
- Table 46 Kee Safety: Key Product Offerings
- Table 47 Werner: Key Product Offerings
- Table 48 FallTech: Key Product Offerings
- Table 49 Cofra: Key Product Offerings
- Table 50 FrenchCreek: Key Product Offerings
- Table 51 Safe Approach: Key Product Offerings
- Table 52 Swelock Asia: Key Product Offerings
- Table 53 Heightsafe: Key Product Offerings
- Table 54 Hi-Rise Access: Key Product Offerings
- Table 55 SafetyLink: Key Product Offerings
- Table 56 Malta Dynamics: Key Product Offerings
- Table 57 Buckingham Manufacturing: Key Product Offerings
- Table 58 Elk River: Key Product Offerings
- Table 59 Sellstrom: Key Product Offerings
- Table 60 Global Fall Protection Equipment Market by Geography 2019–2025 (\$ million)
- Table 61 Soft Goods Market by Product 2019–2025 (\$ million)
- Table 62 Soft Goods Market by Geography 2019–2025 (\$ million)
- Table 63 Hard Goods Market by Product 2019 – 2025 (\$ million)
- Table 64 Hard Goods Market by Geography 2019–2025 (\$ million)
- Table 65 Rescue Kits Market by Geography 2019–2025 (\$ million)
- Table 66 Installed Systems Market by Type 2019 – 2025 (\$ million)
- Table 67 Installed Systems Market by Geography 2019–2025 (\$ million)
- Table 68 Access Systems Market by Geography 2019–2025 (\$ million)
- Table 69 Services Market by Type 2019 – 2025 (\$ million)
- Table 70 Services Market by Geography 2019–2025 (\$ million)
- Table 71 Other Equipment Market by Types 2019 – 2025 (\$ million)



- Table 72 Other Equipment Market by Geography 2019–2025 (\$ million)
- Table 73 Global Fall Protection Equipment Market by End-User 2019–2025 (\$ million)
- Table 74 Market in Construction Industry by Geography 2019–2025 (\$ million)
- Table 75 Market in Oil & Gas Industry by Geography 2019–2025 (\$ million)
- Table 76 Market in Mining Industry by Geography 2019–2025 (\$ million)
- Table 77 Market in General Industry by Geography 2019–2025 (\$ million)
- Table 78 Market in Energy Industry by Geography 2019–2025 (\$ million)
- Table 79 Market in Transportation Industry by Geography 2019–2025 (\$ million)
- Table 80 Market in Telecom & Utility Industry by Geography 2019–2025 (\$ million)
- Table 81 Market in Other Industries by Geography 2019–2025 (\$ million)
- Table 82 North America Market by Product Type 2019–2025 (\$ million)
- Table 83 North America Market by End-User Type 2019–2025 (\$ million)
- Table 84 Europe Market by Product Type 2019–2025 (\$ million)
- Table 85 Europe Market by End-User Type 2019–2025 (\$ million)
- Table 86 APAC Market by Product Type 2019–2025 (\$ million)
- Table 87 APAC Market by End-User Type 2019–2025 (\$ million)
- Table 88 Latin America Market by Product Type 2019–2025 (\$ million)
- Table 89 Latin America Market by End-User Type 2019–2025 (\$ million)
- Table 90 MEA Market by Product Type 2019–2025 (\$ million)
- Table 91 MEA Market by End-User Type 2019–2025 (\$ million)

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