

Hand Sanitizer Market in US - Industry Outlook and Forecast 2020-2025

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Abstracts

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

The US hand sanitizer market is expected to grow at a CAGR of over 20% during the period 2019–2025.

The US is the largest market for the hand hygiene wash and sanitization industry in the world. The country has witnessed a variety of public health epidemics since the 2000s - SARs in 2004, H5N1 Avian influenza in 2006, and 2009 outbreaks of swine flu. These outbreaks have driven the demand for hand sanitizers significantly. Several scientific studies have revealed horrendous statistics about these infections, which have further boosted the adoption of anti-bacterial and hand disinfectant solutions. Studies have shown that the spread of diarrhea and gastrointestinal illnesses can be reduced by almost 50% by practicing effective hand hygiene. This has also propelled the demand for hand sanitizers in the country. However, the market has been witnessing a surge in demand for hand sanitizers since the eruption of COVID-19 pandemic. This peak is likely to continue for the next two years and would start to normalize after 2022. The spread of the virus across the country has resulted in heightened sales for hand sanitizers. Commercial product sales have witnessed a sharp increase in revenue as individuals, educational institutes, companies, and industries ramp up their efforts to ensure safety and hygiene.

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

Rise in Health Consciousness among Consumers

Growth in Healthcare-associated Infections

Rise in Demand for Flavored and Organic Hand Sanitizers

The study considers the present scenario of the US hand sanitizer 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 aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

US Hand Sanitizer Market: Segmentation

This research report includes a detailed market segmentation by Product, End-user, Distribution, and Geography. Gel-based hand sanitizers witnessed about 73% spike in sales in March 2020 in the US amidst the outbreak of COVID-19. The ease of use and cost-effectiveness is boosting the sale of these handrubs among customers. The increasing application of hand antiseptics in the healthcare segment, which is one of the major end-users segment, is likely to drive the segment. Construction, manufacturing, painting, and decoration sectors are the major end-users of Liquid hand sanitizers. These handrubs have demonstrated better antimicrobial performance than gel-based counterparts, thereby increasing the adoption in several industries. With rising awareness of contagious infections across factories and construction sites, workers are getting inclined toward maintaining hand hygiene and safety. Foam-based solutions are often considered to be safe, economical, hassle-free. With 70% ethyl alcohol content, these handrubs are predominantly used in K-12 schools, colleges, universities, hospitality, and commercial segments. Owing to its less scattering feature, foam-based hand sanitizers are preferred over liquid-based ones. Spray hand sanitizers are a niche product segment preferred by selective customer segments across the market. These products are often considered ideal for cost-conscious consumers and are mostly used in gyms and other health wellness centers along with several commercial places.

Although the healthcare sector has been one of the key contributors in the US, it is expected to gain significant market shares by 2025 due to the eruption of COVID-19, which has increased the usage of hand sanitizers in hospitals and clinics. The rise in hospital-associated infections is another major factor influencing the market growth. With such rising awareness about contagious infections and the importance of maintaining hand hygiene among individuals, the sale of hand sanitizer products in the

healthcare sector has observed a rise.

Retail stores offer substantial revenue-generating opportunities for vendors in the market. They are the major platform for vendors to capture market shares. Handrubs are bought to maintain hand hygiene of customers, thus, people are particular while making buying decisions. Supermarkets and hypermarkets are some of the store options where vendors can sell their products, however, small retail shops or departmental stores can boost sales through better relations with retailers. Reckitt Benckiser's Dettol and Unilever's Lifebuoy are some of the renowned brands, which occupy large shelf spaces. Digital sales have been a relevant contributor to the overall revenue generation due to the high rate of technology adoption across geographies and easy accessibility to the internet and other online sales media. Several key vendors have set up their online portals/websites to sell their products. Albeit a small contributor to the overall market revenue currently, online sales are growing and are expected to become a significant contributor in the coming years owing to the huge digital transformation across the world.

Market Segmentation by Product

Gel-based

Liquid-based

Foam-based

Hand Wipes

Sprays

Market Segmentation by End-user

Healthcare

Hospitality

Residential

Corporate

Government & Military

Education

Market Segmentation by Distribution

Retail

Supermarkets & Hypermarkets

Department Stores & Discounters

Drug Stores

Other Retail

Online

Insights by Vendors

The US hand sanitizer market is currently highly fragmented with many local and international players in the market. The competition is intense. The rapidly changing technological environment could adversely affect vendors as customers expect continual innovations and upgrades in hand hygiene and sanitization products. 3M, GOJO Industries, P&G, Reckitt Benckiser, Unilever, and Vi-Jon are the key leading vendors in the US hand sanitizer market. The market concentration in the US is high. Vendors are using new business models and focusing on developing the portfolio of their establishments to drive growth. The focus is heavily shifting toward the use of natural ingredients in hand sanitizers.

Key Vendors

The 3M Company

GOJO Industries

Procter & Gamble (P&G)

Reckitt Benckiser Group

The Unilever Group

Vi-Jon

Other Prominent Vendors

Bath & Body Works

Best Sanitizers

BODE Chemie

Chattem

Cleenol Group

Deb Group

EcoHydra

Ecolab

Henkel

Kimberly-Clark

Christeyns Food Hygiene

Kutol Products Company

Linkwell

Lion Corporation

Medline Industries

Safetec of America

The Himalaya Drug Company

Vectair Systems

Whiteley Corporation

Zoono Group

Key Market Insights

The analysis of the US hand sanitizer market provides sizing and growth opportunities for the period 2020–2025.

Offers market sizing and growth prospects of the market for the forecast period 2020–2025.

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

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

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

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

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