

# **Hand Sanitizer Market Size By Functional Ingredients, Product Type, End-Users, Distribution Channels, Supply Chain, Geography, Industry Analysis 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 Global Hand Sanitizer Market Report

The hand sanitizer market is expected to grow at a CAGR of over 17% during the period 2019–2025.

The introduction of fragrance-based hand sanitizers is one of the major factors responsible for the growth of the global hand sanitizer market. Vendors have started investing in developing fragrant variants of hand cleansers. This innovation has offered positive dividends and has boosted the market growth. The market is also witnessing an influx of bio-based or organic ingredients in hygiene products in several countries. People are getting aware of the ill-effects of chemical-based hand rubs. Therefore, they are displaying a keen interest in purchasing organic or chemical-free hand gels.

The rise in hospital-acquired infections (HAIs) and the outbreak of pandemics such as COVID-19 have influenced the growth. The market landscape of hand hygiene products has drastically changed since the outbreak of COVID-19. The average market demand across the globe is likely to witness a phenomenal rise of over 600% during 2020. The increasing demand for sanitizing solutions along with preventive recommendations by WHO is expected to fuel the market growth. However, the YOY analysis suggests that the spike is not likely to exist for more than two years provided the outbreak is controlled in the upcoming months.

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

Increasing Influence of Internet in Shaping End-users' Purchasing Behavior

Growing Demand for Flavored & Organic Hand Sanitizers

Growth in Promotional Activities

Rise in Health Consciousness among Consumers

The study considers the present scenario of the 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.

## INDUSTRY ANALYSIS BY FUNCTIONAL INGREDIENTS

Alcohol-based sanitizers are the major contributors to the global hand sanitizer market. In 2019, this segment constituted almost 86% of the hand sanitizer market share in terms of revenue.. The market demand for such sanitizers is driven by their ability to prevent infections and kill bacteria, fungi, and viruses. The segment is segmented into subsegments – ethyl and isopropyl. The ethyl-based sanitizer segment has witnessed tremendous growth since the impact of the COVID-19 pandemic. The growth opportunities can be attributed to the fact that these sanitizers are 40% more effective against viruses than normal sanitizers. The global ethyl alcohol-based hand sanitizer market is likely to reach 91 million gallons by 2025. The segment is growing at a CAGR of over 16% during the period 2019-2025.

Isopropyl alcohol (2-propanol), also known as isopropanol or IPA, is the most widely applied sanitizing agent in pharma, hospitals, cleanrooms, and devices or surgical equipment. The market analysis indicates that the need for IPA has slowly risen owing to its use in hand sanitizers. Since the coronavirus infections has rapidly increased in the US and Europe, the sanitization products have become mandatory for healthcare practitioners. Moreover, the European IPA market is increasingly heating up, with producers such as INEOS and SEQENS prioritizing the supply of IPA-containing hand gels to hospitals and health centers. Thus, vendors can currently consider relocating

their resources to boost the supply chain and distribution to capitalize on the demand.

## Market Segmentation by Functional Ingredients

### Alcohol based

Ethyl alcohol

Isopropyl alcohol

### Non-alcohol based

Quats-based hand sanitizers

Chlorine/Iodophor-based hand sanitizers

Others

## INDUSTRY ANALYSIS BY SEGMENTS

The healthcare sector has always been one of the key contributors to the global hand sanitizer market. In 2019, the healthcare sector dominated with its 62% shares, followed by the residential sector. The sale of sanitizing products in the healthcare sector has observed tremendous growth. The rising awareness of contagious infections and the importance of maintaining hand hygiene among individuals is boosting segment growth.

The residential segment is another crucial end-user to be looked upon by vendors. Over the last few years, end-users have become more aware of the hazards of germs and infections prevailing in the environment. They are more careful and cautious in selecting products related to health and hand hygiene. Foam-based sanitizers are in demand in the segment, although gel-based sanitizers are also marking their presence.

## 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

## SUPPLY CHAIN ANALYSIS

The supply chain constitutes an essential component of product availability and reachability. Supply chain strategies ensure the effective market reach and the allocation of products to several geographical locations. The supply chain of hand sanitizers consists of suppliers of ethyl alcohol, isopropyl alcohol, hydrogen peroxide, and glycerin. It also includes external stakeholders such as packers and labelers and sub-contract manufacturers. Currently, the global supply chain of personal care and hygiene products is facing disruptions owing to the surge in market demand. With the eruption of COVID-19 in China, the global supply chain for hand sanitizers has been confronted with several disruptions. Since, the manufacturers depend largely on a complex distribution mechanism centered around China. Due to the COVID-19 outbreak, manufacturing facilities have jumped into overdrive. Companies are adding overtime and shifts along with looking for alternative facilities to produce more necessary items.

## ANALYSIS BY MANUFACTURERS

Global vendors dominate the global hand sanitizer market. The key market players are 3M, GOJO Industries, P&G, Reckitt Benckiser Group, Unilever, and Vi-Jon. GOJO Industries' Purell and Reckitt Benckiser's Dettol were the most preferred personal hygiene brands in 2018. Several international players are expected to expand their presence worldwide, especially in the developing countries in APAC and Latin America. The rising awareness of sanitizer benefits across the globe is likely to intensify during the forecast period. The adoption rate of hand purifiers among end-users worldwide has been impressive. The market is witnessing the entry of several new vendors due to the increased demand. Key players are competing on several factors, including price, innovation, quality, product type, and brand. Therefore, attaining sustainability, expanding into other geographies, and reviving domestic demand are essential factors for the vendors. Vendors can boost profits by practicing efficient production techniques that minimize product costs and mitigate associated risks.

### 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 Technologies

Ecolab

Edgewell Personal Care

Henkel

Kimberly-Clark

Christeyns Food Hygiene

Kutol Products Company

Linkwell Deutschland

Lion Corporation

Medline Industries

Nice-Pak Products

Safetec of America

The Himalaya Drug Company

Vectair Systems

Whiteley Corporation

Zoono Group

#### KEY QUESTIONS ANSWERED IN THE REPORT ARE:

How is COVID-19 impacting the demand in alcohol-based hand sanitizer market?

Which keep functional ingredients have a largest growth trajectory?

Will the valuation of gel-based hand sanitizer remain constant during 2020-2025?

What is the global hand sanitizer market share?

Which regions are the largest revenue contributors in the industry?

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