

Hospital Hand Hygiene Solutions Market - Global Outlook & 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 Hospital Hand Hygiene Solution Market Report

The hospital hand hygiene solution market by revenue is expected to grow at a CAGR of over 8% during the period 2019–2025.

The global hospital hand hygiene market size will reach \$7.7 billion by 2025, growing at a CAGR of 8% during 2020-2025. The industry is driven by the high awareness of personal hygiene and the increased focus on healthcare-associated infections in hospitals and healthcare centers. Hand hygiene products, which include hand wash, sanitizers, and scrubs, are witnessing an increased demand from hospitals as these products help to spread or contain infections in operation theaters, ICUs, emergency centers, and wards. China, Japan, and India are experiencing increased demand for hand hygiene solutions due to the growth in commercial healthcare settings and the shift in consumer behavior for personal hygiene. The growth in the respective market is fueled by public healthcare reforms and rapidly expanding the private sector, coupled with medical tourism. The globalization of healthcare has led to the advent of medical tourism in the APAC and MEA regions. Countries such as Singapore, Saudi Arabia, the UAE, India, Jordan, South Korea, Malaysia, and Thailand are the major destinations for medical tourism in the region. The demand for hospital hand hygiene post-COVID-19 has received a boost due to the rise in patient footfall in healthcare facilities. Developed countries have implemented a policy-driven architecture to maintain a healthy lifestyle. This, in turn, creates a healthy market environment for hygiene products owing to their widespread usage to maintain hygiene at hospitals.

The following factors are likely to contribute to the growth of the hospital hand hygiene

market during the forecast period:

Growth in the Geriatric Population

Spike in Demand Post COVID-19

Advancements in Technology and Innovative Solutions

Increasing Patient Base Due to Rise in Various Diseases

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

Global Hospital Hand Hygiene Market Segmentation

The global hospital hand hygiene market research report includes a detailed segmentation by products, distribution, and geography. The global hand wash market witnessed a phenomenal growth in February 2020 following the WHO recommendations for the use of hand washes (soap or liquid wash) as a preventive measure against COVID-19. Another factor driving the growth among healthcare professionals is the increasing practice of washing hands as a means to prevent diseases and their higher efficiency from killing bacteria and other infections than liquid disinfectants and sanitizers in healthcare settings and centers. Hence, the segment is gaining traction as medical practitioners are recommending washing as a practice to remove germs, pesticides, and dirt and reduce the probability of spreading healthcare-associated infections. The hand wash market size in India is growing due to the increase in healthcare awareness and increased spend on hygiene.

Dealer & distribution is one of the key channels, which constitutes close to a 36% share in the distribution of hospital hand hygiene solution products. Direct procurement was another major distribution strategy, which accounted for over 23% in 2019. This strategy is boosting the cost understanding and procedure outcomes, which are affecting hospital pharmacies' procurement activities. Electronic procurement eliminates the expense of planning and processing inventory orders and invoices and allows purchasing processes to be closely connected to manufacturing structures, thus

reducing time-consuming and inefficient mistakes from manual data entry.

Segmentation by Products

Hand Wash

Hand Sanitizer

Hand Wipes

Lotions & Moisturizers

Hand Scrubs

Hand Disinfectant

Segmentation by Distribution Channel

Mass Retail

Mass Market Players

Drug Stores/Pharmacies

Wholesale Distributors/Stockist

Direct Procurement

Dealers & Distribution

INSIGHTS BY GEOGRAPHY

The North America hospital hand hygiene market accounted for the largest share in 2019. Canada is likely to experience healthy growth during the forecast period. The growth in the region is mainly attributed to the increasing incidence of several acute and chronic diseases such as CVDs, cancer, diabetes, and pneumonia, the availability of advanced healthcare infrastructure, and increasing concerns about safety and hygiene

practices. Besides, before the COVID-19 pandemic, the US CDC reported the flu season in 2018 to be the worst in this decade and have asked people to take extra precautions with infectious diseases. Also, the COVID-19 pandemic outbreak has badly hit healthcare settings in the US, which, in turn, has caused the death of close to 600 healthcare professionals in the US by July 2020.

Segmentation by Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

APAC

China

Japan

South Korea

Australia

India

Latin America

Brazil

Mexico

Argentina

Middle East & Africa

South Africa

Saudi Arabia

Iran

INSIGHTS BY VENDORS

The global hospital hand hygiene market is currently highly fragmented, with many local players in the market. 3M and Reckitt Benckiser are the key leading vendors. Although the market is characterized by the presence of diversified global and regional vendors, regional vendors would be finding it increasingly difficult to compete with them. We believe that global players can grow inorganically by acquiring regional or local players in the future. Further, companies with better technical and financial resources can develop innovative products. Therefore, vendors are remaining abreast of upcoming technology to have a competitive advantage over their rivals. The global hospital hand hygiene market is dominated by the influx of domestic players, including small-scale proprietorship firms. Several domestic players are expected to expand their presence worldwide during the forecast period due to the outbreak of the COVID-19 pandemic, especially in APAC and Latin America, which are fast-developing economies in to gain market share.

Prominent Vendors

The 3M Company

GOJO Industries

Johnson & Johnson

Procter & Gamble (P&G)

Reckitt Benckiser Group

The Unilever Group

Vi-Jon

Other Prominent Vendors

B.Braun Melsungen

Becton, Dickinson and Company (BD)

Beitai Daily Chemical

Cardinal Health

Dynarex Corporation

Bath & Body Works

Best Sanitizers

BODE Chemie

Chattem

Christeyns Food Hygiene

Cleenol Group

Deb Group

EcoHydra Technologies

Ecolab

Edgewell Personal Care

Henkel

Kimberly-Clark

Kutol Products Company

Linkwell

Lion Corporation

Medline Industries

Nice-Pak Products

Safetec of America

The Himalaya Drug Company

Vectair Systems

Whiteley Corporation

Zoono Group

KEY QUESTIONS ANSWERED

1. What is the hospital hand hygiene market size and growth rate during the forecast period?
2. What are the factors impacting the growth of the hospital hand hygiene market share?
3. What are the drivers, trends, and restraints in the hospital hand hygiene market?
4. Who are the leading vendors in the hospital hand hygiene market, and what are their market shares?
5. What is the impact of the COVID-19 pandemic on the hospital hand hygiene market

share?

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