

U.S. Hand Sanitizer Market - Industry 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 U.S. Hand Sanitizer Market Report

The US hand sanitizer market size is expected to grow at a CAGR of around 14% during 2019–2026.

The COVID-19 pandemic has increased the importance of washing hands as a simple and cost-effective solution to reduce disease spread. Did you know that in Q4 2020, the U.S. hand sanitizer market share was valued at over USD 653 million due to the awareness toward personal hygiene and increased cases of virus outbreaks? The region has been witnessing a surge in demand for hand sanitizers owing to the COVID-19 pandemic, and this peak is likely to continue for the next two years and would start to normalize after 2022. The U.S. hand sanitizer market was valued at around 16 million gallons by volume in 2019.

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

The rise in Demand for & Organic Hand Sanitizers

Increase in Healthcare-Associated Infections

Growth in Promotional Strategies

The rise in Health Consciousness Among Consumers

The report considers the present scenario of the US hand sanitizer market and its market dynamics for 2019-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes leading companies and several other prominent companies operating in the market.

U.S. Hand Sanitizer Market Segmentation

The U.S. Hand Sanitizer market research report includes a detailed segmentation by product type, end-users, functional ingredient, distribution channels, region. The gel-based segment is expected to witness an absolute growth of 164% and 157% in terms of revenue and volume, respectively, between 2019 and 2026. The gel-based segment in the US market is projected to grow at a CAGR of around 15% during the forecast period. Vendors providing gel-based sanitizers for the healthcare sector should focus on building the brand image and ensuring that their products deliver the promised result. The healthcare segment is a crucial segment to cater to, thus requiring vendors to be very cautious in selling up their products. Another advantage for vendors catering to the healthcare segment is that a lot of end-customers. Such as patients/relatives of patients who visit the hospital, nursing homes, or the physician's office often come across such products in the office/clinic/hospital and make an automatic selection of their next hand sanitizer product.

In 2019, the healthcare segment accounted for around 60% and 64% share of the U.S. hand sanitizer market in terms of revenue and volume, respectively. The healthcare end-user segment is expected to witness an absolute growth of around 152% and 138% in revenue and volume, respectively, between 2019 and 2026. The healthcare sector has always been one of the key contributors to the U.S. hand sanitizer market share. The consciousness generated amongst patients or visitors or even the health personnel/worker drives the sale of disinfectants in the market. A lot of vendors have created and promoted their products specialized specifically for usage across the healthcare sector. One of the key players, Gojo Industries (owner of Purell brand), has complete hand hygiene solutions developed for various hospitals in the US.

In 2019, the alcohol hand sanitizer segment accounted for over 87% of the US market share. The ethyl alcoholic market is expected to witness an absolute growth of around 150% and 141% in terms of revenue and volume, respectively, by the end of 2026. Ethyl alcohol dominates the global market as most OTC sanitizers contain ethyl alcohol as their main functional ingredients. According to the US FDA, ethyl alcohol is the most popular among US consumers and are present in most OTC product. Vendors

innovating and introducing products in the alcohol-based segment will leverage growth opportunities to widen their customer reach in the US region.

The sale of hand sanitizers through online websites is expected to grow at a high CAGR of over 16% in the forecast period. Discounters are a key segment of the retail distribution channel and sell products at prices usually lower than the typical market price. Vendors can utilize this segment to sell their products owing to its larger customer outreach. Discounters, too, are a good option for vendors to capitalize upon by optimizing the pricing strategy and promoting hand sanitizers as a cost-effective option for customers.

Market Segmentation by Product Type

Gel-Based

Liquid-Based

Foam-Based

Spray

Hand Wipes

Market Segmentation by End-Users

Healthcare

Hospitality

Residential

Corporate

Government & Military

Education

Market Segmentation by Functional Ingredient

Alcohol-Based

Ethyl Alcohol

Isopropyl Alcohol

Non-Alcohol

Quats

Chlorine/Iodophor

Others

Market Segmentation by Distribution Channels

Retail

Supermarkets & Hypermarkets

Departmental Stores & Discounters

Drug Stores

Other Retail

Online

INSIGHTS BY GEOGRAPHY

South U.S. hand sanitizer market is expected to grow with absolute growth of 196%. The hand sanitizer market in the South is expected to reach over 15 million gallons by volume in 2026. Retail sales in the region witnessed a jump in 2020, but the COVID-19 lockdown reduced the pace of rising retail sales. Retail sales were moderate in the South till March 2020, but in April and May in 2020, the market witnessed negative

growth compared to 2019. Central South Carolina has been flourishing with the hospitality facilities and reopening of corporates and institutions. Thus, the market for alcohol-based in the South will grow at a CAGR of around 17% during 2019-2026.

Market Segmentation by Region

South

West

Midwest

Northeast

U.S. HAND SANITIZER MARKET COMPETITOR LANDSCAPE

The hand sanitizer market in the US is fragmented in nature due to the presence of local and international players. Vendors are developing new business models and focusing on enhancing the portfolio of their establishments to drive growth. The focus is quickly shifting towards the use of natural ingredients and materials in disinfectants. Did you know GOJO Industries is utilizing its capabilities to support the large-scale rollout of PURELL Hand Sanitizer to vaccination centers? Reckitt Benckiser has established its leadership position in the global hand sanitizer market via its well-trusted brand Dettol. Continuous expansion of the e-commerce portfolio provides Reckitt Benckiser with an opportunity to exploit eHealth programs.

Key Vendors

The 3M Company

GOJO Industries

Procter & Gamble (P&G)

Reckitt Benckiser Group

The Unilever Group

Vi-Jon

Other Prominent Vendors

Elyptol

Bath & Body Works

Best Sanitizers

Chattem

Ecolab

Kimberly-Clark

Kutol Products Company

Medline Industries

Nice-Pak Products

Safetec of America

Vectair Systems

Zoono Group

The Clorox Company

EO Products

Edgewell Personal Care

SC Johnson

Vectair Systems

Bo International

KEY QUESTIONS ANSWERED

1. How much is the hand sanitizer industry worth?
2. How big is the U.S. hand sanitizer market in terms of volume?
3. Does the report offer a quarterly analysis of the hand sanitizer market?
4. What is the market share of the gel-based hand sanitizer market?
5. Who are the various end-users for hand sanitizer sprays?
6. What are the major hand sanitizer industry drivers?

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