

Hand Dryer Market Report by Product (Hot Air, Jet Air), Operation Mode (Push Button Hand Dryer, Automatic Hand Dryer), Mounting Technique (Surface Mounted, Wall Mounted), End User (Hotel, Hospitals and Clinics, Food Processing and Service Industry, Commercial Complexes, Office Buildings, and Others), and Region 2024-2032

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Abstracts

The global hand dryer market size reached US\$ 993.5 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 2,272.6 Million by 2032, exhibiting a growth rate (CAGR) of 9.4% during 2024-2032. The increasing demand for high-speed, energy-efficient hand dryers, growing adoption of touchless and hygienic solutions, and a shift towards sustainable and eco-friendly hand drying options are some of the key factors propelling the hand dryer market growth.

Hand Dryer Market Analysis:

Major Market Drivers: The widespread adoption of automatic hand dryers across various industrial verticals, such as healthcare and hospitality, for maintaining hygiene is one of the primary factors driving the hand dryer market growth. In line with this, in the post-pandemic era, automatic hand dryers are widely adopted to offer contactless hand-drying experience, which is acting as another major growth-inducing factor.

Key Market Trends: Various technological advancements in hand dryer technology and the introduction of blade hand dryers for minimizing bacterial spread in washrooms are further catalyzing the market growth.

Geographical Landscape: The largest hand dryer market is in Europe, specifically the UK. This is due to factors such as high levels of hygiene awareness, a strong focus on energy efficiency, and the presence of large commercial and hospitality industries.

Moreover, the presence of prominent market players in the region is also creating a positive outlook for the market.

Competitive Landscape: Some of the leading hand dryer market companies include American Specialties Inc., Bobrick Washroom Equipment Inc., Dyson Limited, Euronics Industries Pvt Ltd, Excel Dryer Inc., Hokwang Industries Co. Ltd, Jaquar Group, Mitsubishi Electric Corporation, Palmer Fixture Company, Panasonic Corporation, Saniflow Hand Dryer Corporation, and World Dryer Corporation (Zurn Water Solutions Corporation) among others.

Challenges and Opportunities: Challenges in the hand dryer market include concerns about energy efficiency and noise levels, as well as the ongoing debate over hygiene compared to paper towels. However, opportunities arise from a growing awareness of sustainability and hygiene, driving the demand for innovative, eco-friendly, and touchless hand-drying solutions. Additionally, advancements in technology, such as improved airflow efficiency and antibacterial coatings, present opportunities for market growth and differentiation.

Hand Dryer Market Trends:

Technological Advancements

Various key market players are significantly investing in research and development activities to introduce hand dryers that are more hygienic, energy-efficient, and user-friendly. For instance, touchless hand dryers use infrared sensors to detect the hand's presence, eliminating the need for users to touch the device and reducing the cross-contamination risk. These hand dryers are becoming increasingly popular in public washrooms and healthcare facilities. High-speed hand dryers use powerful motors and advanced air-flow systems to dry hands in as little as 10-15 seconds. These hand dryers are popular in high-traffic areas where speed and efficiency are important. Additionally, various manufacturers are experimenting with hand dryer shapes to enhance user experience, which is anticipated to propel the hand dryer market revenue in the coming years. For instance, in May 2024, Saniflow, a Mediclinics company and innovative leader in restroom solutions, announced the launch of U-Flow, a groundbreaking hand dryer, setting a new standard in hygiene, efficiency, and environmental sustainability. Unlike conventional dryers, which focus on performance, U-Flow incorporates state-of-the-art technology and commitment to hygiene, considering the user experience as a differentiator.

Infrastructural Progress

Continuous infrastructural development, primarily across emerging economies, is further

catalyzing the growth of the market. The rise in the number of restaurants, hotels, malls, and fast-food chains across the globe is resulting in increased adoption of hand dryers. For instance, India has a total mall stock of 92.9 million sq ft spread across 271 operational malls in the top eight markets, including Ahmedabad, Bengaluru, Chennai, Hyderabad, Kolkata, Mumbai, National Capital Region (NCR), and Pune. Similarly, as of the end of March 2023, the number of restaurants in Japan amounted to roughly 935.35 thousand. Besides this, the rising inclination towards building smart infrastructures is positively impacting the hand dryer market outlook. Moreover, the government authorities and a few private players in developing nations are allocating significant funds for infrastructure development. For instance, India's infrastructure sector is poised for unparalleled growth, driven by government initiatives and increased investments. India's infrastructure sector is poised for strong growth, with investments worth US\$ 1.4 Trillion planned by 2025 under the National Infrastructure Pipeline (NIP). Such initiatives for building a smart infrastructure, along with the escalating number of restaurants, hotels, and malls, are projected to propel the hand dryer market demand.

Environmental Consciousness

The rising environmental consciousness amongst consumers and the increasing demand for eco-friendly devices over towels and tissues to save paper is significantly catalyzing the growth of the market. Hand dryers focus on environmental sustainability to reduce waste and conserve resources. Since strict regulations are implemented for energy efficiency and environmental impacts, hand dryers are mainly used rather than paper towels because of their less waste generation. In response to this, various leading manufacturers are increasingly investing in developing sustainable and eco-friendly hand dryers that work on minimal energy. For instance, in September 2023, Initial Malaysia launched the latest addition to its Hand Dryer service range, known as the Luna Dry. Stylish and sustainable, the Luna Dry hand dryer is equipped with a HEPA-13 air filter to ensure clean air to dry hands. Moreover, Luna Dry emits up to 90% less carbon dioxide, which contributes to sustainability goals. Such innovations are anticipated to augment the hand dryer market share in the coming years.

Global Hand Dryer Market Segmentation:

IMARC Group provides an analysis of the key trends in each sub-segment of the global hand dryer market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on product, operation mode, mounting technique, and end user.

Breakup by Product:

Hand Dryer Market Report by Product (Hot Air, Jet Air), Operation Mode (Push Button Hand Dryer, Automatic Hand...

Hot Air
Jet Air

Jet air exhibits a clear dominance in the market

The report has provided a detailed breakup and analysis of the market based on the product. This includes hot air and jet air. According to the hand dryer market report, jet air exhibits a clear dominance in the market.

Jet air hand dryers use high-speed jets of air to quickly dry hands, typically within 10-15 seconds. As a result, they are highly preferred in commercial restrooms where the traffic is significantly high. They operate by pushing air through narrow nozzles at high velocity, removing moisture from hands efficiently. These dryers are often more energy-efficient and hygienic compared to traditional hand-drying methods. They're commonly found in public restrooms as a fast and eco-friendly alternative to paper towels.

Breakup by Operation Mode:

Push Button Hand Dryer
Automatic Hand Dryer

Automatic hand dryer currently represents the largest market share

The report has provided a detailed breakup and analysis of the market based on the operation mode. This includes push button hand dryer and automatic hand dryer. According to the report, automatic hand dryer currently represents the largest market share.

Automatic hand dryers use motion sensors to detect when hands are placed beneath them, activating the airflow for drying. They eliminate the need for paper towels, reducing waste and promoting sustainability. Their touch-free operation enhances hygiene by minimizing surface contact. Moreover, in the post-pandemic era, automatic hand dryers have gained traction to offer a contactless hand-drying experience, which, in turn, aids in inhibiting the spread of the virus significantly. As a result, various key market players are now introducing automatic and touch-free hand dryers. For instance, in April 2022, the British tech giant, Dyson, launched Dyson Airblade 9kJ - a touch-free hand dryer that not only dries the hands but also purifies the washroom air. It comes with HEPA filters that can filter out up to 99.95% of particles from the air in a washroom.

Breakup by Mounting Technique:

Surface Mounted

Wall Mounted

The report has provided a detailed breakup and analysis of the market based on the mounting technique. This includes surface mounted and wall mounted.

Surface-mounted hand dryers are installed directly onto the wall surface, making them easy to install and suitable for various restroom layouts. They offer convenience and accessibility, requiring minimal space and no additional structural modifications. Wall-mounted hand dryers are recessed into the wall, providing a sleek and streamlined appearance that enhances restroom aesthetics. They offer space-saving benefits and reduce the risk of vandalism or damage, as they are less exposed than surface-mounted models.

Breakup by End User:

Hotel

Hospitals and Clinics

Food Processing and Service Industry

Commercial Complexes

Office Buildings

Others

Hotels accounted for the largest market share

The report has provided a detailed breakup and analysis of the market based on the end user. This includes hotel, hospitals and clinics, food processing and service industry, commercial complexes, office buildings, and others. According to the report, hotel currently account for the majority of the global market share.

This can be attributed to the growth of the hotel industry. The hand dryer market statistics by IMARC indicate that the escalating number of hotels across the world is prompting the adoption of hand dryers. For instance, the hotel market in India is expected to witness a rise in revenue with a projected value of US\$ 9.13 Billion by 2024. Similarly, there were 166,272 hotels & motel businesses in the U.S. as of 2023, an increase of 7.1% from 2022. The U.S. hotel industry was projected to achieve 1.3

billion occupied room nights in 2023. Such a rapid expansion of the hotel industry is anticipated to propel the hand dryer market's recent prices in the coming years.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Europe currently dominates the global market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Europe currently dominates the global market.

The hand dryer market overview by IMARC indicates that the largest hand dryer market is in Europe, specifically the UK. This is due to factors such as high levels of hygiene awareness, a strong focus on energy efficiency, and the presence of large commercial and hospitality industries. Moreover, the presence of prominent market players in the region is also creating a positive outlook for the market. In addition to this, regional manufacturers are increasingly investing in upgrading their hand dryer technology and introducing improved and energy-efficient variants of hand dryers. For instance, in February 2023, Bobrick Washroom Equipment, Inc., known for its innovative products, introduced a new initiative showcasing four accessories designed to help facility managers easily update their restrooms. These include the SureFlo Automatic, Top-Fill Bulk Foam Soap Dispenser, Automatic, Universal Roll Towel Dispenser, Bobrick Falcon Urinal Conversion System, and PureDri Sanitizing Hand Dryer.

Competitive Landscape:

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

American Specialties Inc.
Bobrick Washroom Equipment Inc.
Dyson Limited
Euronics Industries Pvt Ltd
Excel Dryer Inc.
Hokwang Industries Co. Ltd
Jaquar Group
Mitsubishi Electric Corporation
Palmer Fixture Company
Panasonic Corporation
Saniflow Hand Dryer Corporation
World Dryer Corporation (Zurn Water Solutions Corporation)

(Kindly note that this only represents a partial list of companies, and the complete list has been provided in the report.)

Hand Dryer Market Recent Developments:

May 2024: Saniflow, a Mediclinics company, and innovative leader in restroom solutions, announced the launch of U-Flow, a groundbreaking hand dryer, setting a new standard in hygiene, efficiency, and environmental sustainability. Unlike conventional dryers, which focus on performance, U-Flow incorporates state-of-the-art technology

and commitment to hygiene, considering the user experience as a differentiator.

January 2024: Artists For Humanity (AFH), combined its commitment to sustainability with its dedication to art and design. AFH partnered with Excel Dryer, to install first-of-their-kind XLERATOR Hand Dryers customized with artwork designed by local teens in its facility bathrooms.

August 2023: Excel Dryer upgraded to electrostatic HEPA filtration, which is an optional feature for their XLERATOR hand dryer models. It is now available in its newly expanded, surface-mounted, ADA-compliant ThinAir Hand Dryer product line. ThinAir is a high-efficiency model that includes all the standard enhanced features, including adjustable sound, speed and heat controls, while also protruding less than four inches from the wall to adhere to ADA regulations.

Key Questions Answered in This Report

1. What was the size of the global hand dryer market in 2023?
2. What is the expected growth rate of the global hand dryer market during 2024-2032?
3. What are the key factors driving the global hand dryer market?
4. What has been the impact of COVID-19 on the global hand dryer market?
5. What is the breakup of the global hand dryer market based on the product?
6. What is the breakup of the global hand dryer market based on the operation mode?
7. What is the breakup of the global hand dryer market based on the end user?
8. What are the key regions in the global hand dryer market?
9. Who are the key players/companies in the global hand dryer market?

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