

Hand Sanitizer Market - Forecasts from 2020 to 2025

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Abstracts

The global hand sanitizer market is expected to grow at a CAGR of 11.68% over the forecast period to reach a total market size of US\$2,548.984 million by 2025, increasing from US\$1,313.756 million in 2019. Sanitizers are generally used to decrease infectious agents on the hands and with the increasing awareness about health hygiene the market is expected to witness substantial growth. Increasing inclination towards health and wellness coupled with the rising personal healthcare expenditure is expected to drive the growth of the market during the forecast period. Also, the growing demand for convenience products, rapid urbanization and modernization in developing countries like India and China and rising need for germ protection is further triggering the demand for hand sanitizer in the next five years. In addition, expanding the e-retailing business around the globe coupled with the increasing investment also propels the market growth opportunities for hand sanitizer business. However, the dependency of FMCG products such as detergents and personal soaps and high raw material price volatility is expected to hinder the growth of the market in the coming years.

Increasing healthcare spending

It is considered as one of the prime drivers for the growth of the market during the forecast period. According to the Organisation for Economic Co-operation and Development data, the per capita healthcare spending in China and India has increased from 481.6USD and 163.5 USD in 2012 to nearly 750USD and 225 USD respectively by the end of 2018. Favourable government measures are also opening up the ways for new players to enter the market with huge potential. Both and public and private players are investing heavily in the developing countries to cater to the growing the of hand sanitizer on account of growing living standards and disposable income.

Gel segment is holding a significant share in the market

By product, the hand sanitizer market is segmented as gel, foam, spray, and others. Gel segment is expected to a significant share in the market in 2019. The gel form of hand sanitizer is thin and is watery in formulations which are considered as a convenience form to consumers. Due to ease of product availability of gel form of hand sanitizers the market is anticipated to witness substantial growth in the coming years. In addition, due to the increasing influence of social media in form of online advertisements, there is a gradual shift of people towards health hygiene and personal care which is further expected to accelerate the growth of the hand sanitizer market over the next five years.

Pharmacy store is driving the market during the forecast period

Pharmacy store is a critical retail channel of distribution in the hand sanitizer and companies are targeting detailed media strategy and plans with sound reasoning and linking back to pharma model learning such as pharmacy store marketing program, key opinion leader program under which targeted doctors and hospitals. Also, in developing countries, customers prefer scanning the product details before buying which also drives the demand for hand sanitizer through the offline form of distribution channel. Also, a growing numbers of supermarkets and hypermarkets across various regions the market for offline distribution is witnessing significant growth. Furthermore, increasing internet penetration coupled with the increasing investment by e-commerce companies such as Amazon, Alibaba, and Wal-Mart the market for online distribution channels is anticipated to grow at an exponential rate in the coming years. Also, online retailers around the globe are also adding hand sanitizer as a main focus area for the customers.

North America is holding a significant share in the market

By geography, the hand sanitizer market is segmented as North America, South America, Europe, the Middle East and Africa, and the Asia Pacific. The hand sanitizer market in North America is estimated to hold a significant share in 2019 and is anticipated to grow rapidly on account of the early adoption of sanitizers and rising health awareness among people in the region. Simultaneously, the region is the home of the world's largest pharmaceutical companies and with the high hygiene standards among European and American population the market is anticipated to witness substantial growth in North America and Europe region. The Asia Pacific is also expected to provide good growth opportunities on account of rising disposable income and improvement in living standards.

Competitive Insights

Prominent key market players in the Indian hand sanitizer market include Reckitt Benckiser Group plc, Procter & Gamble, The Himalaya Drug Company, Henkel AG & Company, and Unilever among others. At present, these companies hold a significant share in the market and are adopting various growth strategies such as new product launches, M&A, and partnerships to expand their footprint in the country. For instance, in India recently Lifebuoy launched two new variants of its cosmetic hand sanitizer segment. Such product launches are expected to serve as a solid foundation that will further strengthen (Unilever) Lifebuoy's solution development capabilities. Also, in 2017, Himalaya Wellness launched new sanitizers that are available in fruit flavours such as green apple, strawberry, and orange. Major players in the global hand sanitizer market have been covered along with their relative competitive position and strategies. The report also mentions recent deals and investments of different market players over the last year. The company profiles section details the business overview, financial performance (public companies) for the past few years, key products and services being offered along with the recent deals and investments of these important players in the global hand sanitizer market.

Segmentation:

By Product

Gel

Foam

Spray

Others

By Capacity

Less than 100ml

More than 100ml

By Distribution Channel

Online

Offline

Departmental Store

Pharmacy Store

Others

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

UK

Germany

France

Spain

Italy

Others

Middle East and Africa

Asia Pacific

Japan

China

India

Australia

South Korea

Others

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