

Personal Protective Equipment in the U.S.

<https://marketpublishers.com/r/P15F2903589EN.html>

Date: July 2012

Pages: 269

Price: US\$ 4,950.00 (Single User License)

ID: P15F2903589EN

Abstracts

SBI estimates the U.S. market for personal protective equipment (PPE) will top \$13 billion in 2012. As the economy begins to heat up, U.S. PPE sales should exceed \$14.1 billion in 2013, which represents an 8.2 percent increase over the 2012 figure. The strengthening global economy should increase the growth rate in 2015 with PPE sales in the U.S. anticipated to hit \$16.7 billion.

The Personal Protective Equipment sector is comprised of a group of products that are designed to protect users from occupational hazards, injuries and illnesses. Categories covered include:

Body Protection and Protective Clothing

Hand and Foot Protection

Head and Face Protection

Respiratory Protection

The report provides data on shipments, imports and exports for the personal protective equipment market and the four categories within the market. In most cases, historical data are provided for a 10-year period back to 2002. The report also identifies key economic and market trends affecting the industry and profiles key manufacturers, highlighting their strengths, performance, product portfolios and significant recent events. Also included are marketing, distribution and retail overview, outlining aspects of getting the products to market, and an end-user segment analysis.

Report data were gathered from:

Shipment statistics for personal protective equipment —reports published by the U.S. Census Bureau, including the Annual Survey of Manufacturers (ASM) and the U.S. Economic Census

Import and export data —the Commerce Department’s USA Trade Online website

Revenues for manufacturers —company reports and SEC filings

End-User data —sources include The Bureau of Labor Statistics, The Federal Bureau of Investigation, the U.S. Fire Administration and the National Fire Protection Association.

Contents

CHAPTER 1

Executive Summary

Scope

The Regulatory Environment

OSHA

OSHA's Voluntary Protection Programs (VPP)

Figure 1-1: Top 15 Industries in the VPP (Federal) as of January 31, 2012

OSHA Inspections

MSHA

NFPA

ANSI

PPE Standards

Employer Duty to Pay

Methodology

Figure 1-2: U.S. Market for Personal Protective Equipment, 2002 through 2011 (in US \$ million)

Historical sales by product category

Table 1-1: Historical PPE Sales for the period from 2007 through 2011 (US \$ millions)

Table 1-2: Year-to-year sales growth by category 2007 through 2011 (%)

Projected sales growth

Figure 1-3: Projected U.S. PPE sales growth from 2012 through 2017 (US \$ million)

Table 1-3: Projected year-to-year sales growth for the period 2012 through 2017 (%)

Table 1-4: Projected changes in market share by category for the period 2012 through 2017 (%)

Table 1-5: Projected U.S. shipments of body protection/clothing for the period 2012 through 2017 (US \$ million)

Economic Factors

Table 1-6: Change in GDP, 2001 - 2011

Global Economic Factors

Table 1-7: Historical and forecast global real gross domestic product (percentage change over previous period)

Rising Manufacturing Costs

Commodity Price Increases

Figure 1-4: 13-month percentage changes in coarse wool prices

Figure 1-5: 13-month percentage changes in fine wool prices

Figure 1-6: 3-month percentage changes in cotton prices

Figure 1-7: 13-month percentage changes in leather hide prices

Figure 1-8: 13-Month Percentage Changes in Plastic Prices

Figure 1-9: 13-Month Percentage Changes in Rubber Prices

Workplace Injury, Illness and Fatality Trends

Table 1-8: Summary of Private Industry Incident Rates (Source: BLS)

Occupational Injuries & Illnesses

Table 1-9: Number of recordable cases, 2008 – 2010.

Table 1-10: Leading event or exposure for selected occupations, all ownerships, 2010

Preparing for an Aging Workforce

Obesity and PPE

Rising Insurance Costs

Figure 1-10: Average Annual Increase in Family Health Insurance Premiums

Compared to Other Indicators, 2000 – 2011.

Style, Customization & Comfort Factors

PPE Misuse Linked to Lack of Comfort

Manufacturer Distribution Points: Mostly Intermediary

Sales Force Structure

Marketing & Promotion

Internet Will Play Increasingly Greater Role in promoting PPE

Social Media

Mobile Applications

Workplace Safety Blogs

Governmental Agencies Promoting PPE

Trade Shows

Table 1-11: Upcoming Safety Conferences and Expos, 2012-2013

PPE in the Workplace

Understanding Demand for PPE in the Workplace

Table 1-12: Top 10 Most Common Injuries at Work

Overview of the Four Key Sectors That Utilize PPE

Natural Resources & Mining Sector

Growth Potential

Figure 1-11: Number of persons employed in coal mining 1985 through 2010

Construction

Employment Trends in the Construction Sector

Table 1-13: Construction Employment 2002 through 2011 (thousands)

Manufacturing

Manufacturing sector trends

Table 1-14: Number of Private Manufacturing Establishments 2001 through 2011

Summary

CHAPTER 2 MARKET DEFINITION

Scope

Product Definitions

Body Protection Products

Table 2-1: Body Protection Product Types

Table 2-2: Effectiveness of Protective Materials Against Chemical Degradation

Hand Protection Products

Figure 2-1: Cut and Abrasion Resistant Gloves

Table 2-3: Glove Materials Used for Chemical Protection

Foot Protection Products

Figure 2-2: PPE: Steel-toed Shoes

Head Protection Products

Figure 2-3: Head Protection

Eye and Face Protection Products

Figure 2-4: PPE: Eye Goggles

Ear Protection Products

Figure 2-5: Ear Protection: Earmuffs

Respiratory Protection Products

Figure 2-6: PPE: Respirator

The Regulatory Environment

OSHA

OSHA's Voluntary Protection Programs (VPP)

Figure 2-7: Growth of Federal and State VPP Sites, 1999-2012

Figure 2-8: Top 15 Industries in the VPP (Federal) as of January 31, 2012

OSHA Inspections

MSHA

NFPA

ANSI

PPE Standards

Hand Protection

Foot Protection

Head Protection

Eye and Face Protection

Ear Protection

Table 2-4: Permissible Noise Levels and Exposure Limits

Body Protection

Respiratory Protection

Employer Duty to Pay
Employer duty to provide PPE and training
Summary

CHAPTER 3 CATEGORY PERFORMANCE

Market Size and Growth

Methodology

U.S. PPE market exceeded \$12 billion in 2011

Table 3-1: U.S. PPE Market Size, 2008 - 2009 (US \$ million)

Figure 3-1: U.S. Market for Personal Protective Equipment, 2002 through 2011 (in million \$)

Table 3-2: U.S. Market for Personal Protective Equipment, year-to-year change 2002 through 2011

Table 3-3: Historical PPE Sales for the period from 2007 through 2011 (US \$ millions)

Table 3-4: Year-to-year sales growth by category 2007 through 2011 (%)

Table 3-5: Market share for each PPE category from 2007 through 2011

Table 3-6: U.S. Shipments body protection/clothing for the period 2007 through 2011 (US \$ million)

Table 3-7: Percent change in U.S. shipments of body protection/clothing year-to-year for the period 2007 through 2011 (US \$ million)

Table 3-8: U.S. Shipments hand & foot protection for the period 2007 through 2011 (US \$ million)

Table 3-9: Percent change in U.S. shipments of hand & foot protection year-to-year for the period 2007 through 2011 (US \$ million)

Table 3-10: U.S. Shipments head & face protection for the period 2007 through 2011 (US \$ million)

Table 3-11: Percent change in U.S. shipments of head & face protection year-to-year for the period 2007 through 2011 (US \$ million)

Table 3-12: U.S. Shipments respiratory protection for the period 2007 through 2011 (US \$ million)

Table 3-13: Percent change in U.S. shipments of respiratory protection year-to-year for the period 2007 through 2011

Figure 3-2: Projected U.S. PPE sales growth from 2012 through 2022 (US \$ million)

Table 3-14: Projected year-to-year sales growth for the period 2012 through 2022 (%)

Table 3-15: Projected sales growth in dollar volume by category for the period 2012 through 2022 (US \$ million)

Table 3-16: Projected year-to-year sales growth by category for the period 2012 through 2022 (%)

Table 3-17: Projected changes in market share by category for the period 2012 through 2022 (%)

Table 3-18: Projected U.S. shipments of body protection/clothing for the period 2012 through 2022 (US \$ million)

Table 3-19: Projected U.S. shipments of hand & foot protection for the period 2012 through 2022

Table 3-20: Project U.S. shipments of head & face protection for the period 2012 through 2022 (US \$ million)

Table 3-21: Projected U.S shipments of respiratory protection for the period 2012 through 2022 (US \$ million)

CHAPTER 4 TRENDS

Economic Factors

Table 4-1: Change in GDP, 2001 - 2011

Global Economic Factors

Table 4-2: Historical and forecast global real gross domestic product (percentage change over previous period)

Rising Manufacturing Costs

Commodity Price Increases

Figure 4-1: 13-month percentage changes in coarse wool prices

Figure 4-2: 13-month percentage changes in fine wool prices

Figure 4-3: 13-month percentage changes in cotton prices

Figure 4-4: 13-month percentage changes in leather hide prices

Figure 4-5: 13-Month Percentage Changes in Plastic Prices

Figure 4-6: 13-Month Percentage Changes in Rubber Prices

Producer Price Index

Table 4-3: 2002 through 2011 Historical Produce Price Index – Commodities (1-month percent change)

Labor Costs

Employment Trends in Key PPE Markets

Table 4-4: Total Employment by Selected Occupation Sectors 2010 and Projected Employment in 2020 (in thousands)

Workplace Injury, Illness and Fatality Trends

Table 4-5: Summary of Private Industry Incident Rates (Source: BLS)

Occupational Injuries & Illnesses

Table 4-6: Number of recordable cases, 2008 – 2010

Table 4-7: Leading event or exposure for selected occupations, all ownerships, 2010

Table 4-8: Selected part of body median days away from work

Table 4-9: 2010 Percent of total MSDs

OSHA Accuracy in Question

Reduced Injury Rates Can Lead to Greater Opportunities

An aging workforce

Preparing for an Aging Workforce

Accommodations for Aging Workforce

Health & Obesity Concerns

The Cost of Being Overweight

Obesity and PPE

Rising Insurance Costs

Figure 4-7: Average Annual Increase in Family Health Insurance Premiums Compared to Other Indicators, 2000 – 2011.

Figure 4-8: Cumulative Increases in Health Insurance Premiums, Workers' Contributions to Premiums, Inflation, and Workers' Earnings, 1999–2011.

Table 4-10: Employee Compensation Costs Breakdown, Key Industry Sectors (2011)

Threat of Terrorism

Protecting Against CBRN

Style, Customization & Comfort Factors

PPE Misuse Linked to Lack of Comfort

Comfort Matters, but Quality Is Essential

Additional Strategies for Increasing PPE Usage

Ergonomics

Nanotechnology

I would like to order

Product name: Personal Protective Equipment in the U.S.

Product link: <https://marketpublishers.com/r/P15F2903589EN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/P15F2903589EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970