

# **India Hand Dryer Market By Type (Jet Air Hand Dryers, Hot Air Hand Dryers), By End User (Shopping Malls, Hospitality, Educational Institutions, Corporate Offices, Healthcare, Others (Airports and Transportation Hubs, Entertainment Venues, etc.)), By Region, By Competition Forecast & Opportunities, 2019-2029F**

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## **Abstracts**

The hand dryer market in India has experienced noteworthy growth and transformation in recent years, driven by a confluence of factors including technological advancements, heightened hygiene awareness, and the pursuit of sustainable solutions. Hand dryers, now commonly observed in public restrooms and commercial establishments, have gradually supplanted traditional paper towels due to their convenience, cost-effectiveness, and environmental advantages. This shift has led to increased adoption of hand dryers across diverse sectors such as hospitality, healthcare, corporate offices, educational institutions, and airports. The market size is poised for further expansion due to the ongoing prioritization of sanitation and hygiene. The future of the Indian hand dryer market appears promising, with several trends poised to influence its trajectory. Advancements in technology are likely to yield more efficient and intelligent hand drying solutions. Furthermore, collaborations between manufacturers and various industries could yield customized solutions tailored to specific requirements.

Moreover, the COVID-19 pandemic has heightened awareness of hygiene practices, prompting businesses and institutions to implement measures that minimize the spread of infections. Hand dryers have gained recognition as a more hygienic alternative to traditional paper towels, as they eliminate the need for physical contact and reduce the potential transfer of germs from wet hands. Manufacturers have responded by

enhancing the sanitation features of their hand dryers, integrating them as an integral component of comprehensive hygiene strategies.

#### Key Market Drivers:

**Technological Advancements:** Technological progress has been a pivotal driver of the Indian hand dryer market. Manufacturers have consistently focused on enhancing the efficiency, speed, and user experience of hand dryers. The introduction of high-speed hand dryers featuring powerful airflow, touchless sensors, and rapid drying times has significantly enhanced user satisfaction. Technological innovations have not only elevated convenience but have also addressed hygiene concerns by reducing the need for physical contact with restroom surfaces.

**Hygiene Awareness and Public Health Concerns:** A primary driver of the Indian hand dryer market is the rising awareness of hygiene across the population. Increased hygiene awareness, particularly in response to global health concerns like the COVID-19 pandemic, has significantly contributed to the growing adoption of hand dryers. Businesses, institutions, and individuals now recognize the critical role of hand hygiene in preventing the spread of infections. Hand dryers, by eliminating the need for paper towels and reducing the risk of cross-contamination, have emerged as a preferred choice for upholding hygiene in public areas.

**Sustainability and Environmental Concerns:** The growing emphasis on sustainability has spurred the transition from conventional paper towels to hand dryers. India's commitment to environmental conservation and waste reduction aligns with the adoption of eco-friendly alternatives. Hand dryers substantially reduce paper waste and contribute to forest preservation. Businesses and institutions increasingly value sustainable practices, and the ecological attributes of hand dryers significantly influence these decisions.

**Changing Consumer Preferences:** Evolving consumer preferences, marked by a penchant for modern amenities and technologies, have catalyzed the adoption of hand dryers. The convenience of hand dryers, combined with touchless operation and swift drying times, resonates with these changing preferences. Businesses attuned to these shifts invest in hand dryers to enhance customer experiences and align with contemporary expectations of convenience and hygiene.

**Government Regulations and Initiatives:** Government regulations and initiatives aimed at hygiene standards and sustainable practices play a pivotal role in driving the hand

dryer market in India. Guidelines mandating specific hygiene standards in public spaces encourage businesses and institutions to adopt more effective and hygienic hand drying solutions. Government-led campaigns promoting energy efficiency and environmental preservation further bolster the adoption of hand dryers across the Indian market.

**Urbanization and Commercial Infrastructure Development:** India's rapid urbanization and the expansion of commercial infrastructure have generated demand for modern amenities and facilities in public spaces. As malls, airports, hotels, and corporate offices grow, the necessity for efficient and effective hand drying solutions becomes evident. Increased foot traffic in these venues prompts businesses to invest in high-quality hand dryers that meet hygiene and convenience expectations.

**Cost-Effectiveness and Long-Term Savings:** While the initial investment in hand dryers might exceed that of traditional paper towels, the long-term cost-effectiveness is a compelling factor. Hand dryers obviate the ongoing expense of purchasing and disposing of paper towels. Businesses recognize the potential for substantial savings over time, rendering hand dryers an attractive and economical choice.

#### Key Market Challenges:

**Perceptions and Cultural Norms:** One challenge confronting the Indian hand dryer market is the entrenched cultural preference for paper towels. Traditional habits and perceptions are resistant to change, with some individuals viewing hand dryers as less effective or convenient compared to paper towels. Overcoming these perceptions necessitates targeted efforts to educate consumers about the advantages of hand dryers in terms of hygiene, environmental sustainability, and convenience.

**Energy Consumption and Sustainability Concerns:** Despite being perceived as more eco-friendly than paper towels, concerns regarding energy consumption persist. Some consumers and businesses worry that hand dryers consume excessive energy, contributing to their carbon footprint. To address this challenge, manufacturers are developing energy-efficient models with improved power management systems. Communicating the energy-saving features of these products can alleviate sustainability concerns.

**Noise Levels:** Hand dryers can produce noise levels that some users find disruptive, especially in quiet settings like upscale restaurants or office spaces. Balancing effective drying performance with acceptable noise levels is crucial. Manufacturers are working to introduce quieter hand dryer models, incorporating noise-reduction technologies to

ensure a more pleasant user experience.

**Maintenance and Hygiene:** Upholding hygiene standards in public restrooms poses a notable challenge. Hand dryers can accumulate dust, dirt, and germs if not cleaned and maintained regularly. Ensuring that hand dryers remain clean and sanitized is essential to preserve their hygiene benefits. Businesses and facilities must establish proper cleaning protocols and maintenance schedules to mitigate this challenge.

**Infrastructure Limitations:** In certain locations, particularly older buildings and rural areas, the electrical infrastructure may not support the installation of high-power hand dryers. This limitation can impede the adoption of advanced hand drying technology in these regions. To address this challenge, manufacturers should develop hand dryer models suitable for a range of electrical setups, ensuring accessibility across diverse locations.

**Maintenance and Technical Support:** In remote areas or regions with limited access to maintenance and technical support services, businesses may hesitate to invest in hand dryers. Manufacturers should establish a robust network of service centers and trained technicians to provide prompt maintenance and support, regardless of location.

**Competitive Pricing and Market Fragmentation:** The Indian hand dryer market features both domestic and international manufacturers, resulting in a variety of product offerings with different price points and features. Intense competition can make it challenging for businesses to identify the optimal solution for their specific requirements. Manufacturers should focus on communicating their products' unique value propositions to aid customers in making informed decisions.

**Key Market Trends:**

**Touchless Technology and Hygiene Assurance:** The ongoing COVID-19 pandemic has accelerated the adoption of touchless technology, extending to hand dryers as well. Touchless hand dryers equipped with advanced sensors for automatic activation are gaining popularity. These not only minimize physical contact but also enhance hygiene by reducing the risk of cross-contamination. As hygiene concerns persist, touchless technology is likely to remain a dominant trend in the Indian hand dryer market.

**High-Speed and Efficient Drying:** Consumers' expectations for efficiency and convenience have propelled the demand for high-speed hand dryers. These dryers offer rapid drying times, addressing user concerns about time efficiency. The trend toward

high-speed hand dryers is expected to continue as businesses and facilities seek to deliver swift and efficient hand drying experiences for their patrons.

### Energy Efficiency and Sustainability

The focus on sustainability and environmental responsibility is influencing product development in the hand dryer market. Manufacturers are increasingly investing in energy-efficient hand dryers that minimize power consumption while maintaining optimal drying performance. This trend aligns with India's commitment to sustainability and presents an opportunity for manufacturers to showcase their dedication to reducing carbon footprints.

**Improved Noise Management:** Noise levels generated by hand dryers have concerned some users, particularly in quiet environments. Manufacturers are addressing this challenge by introducing quieter hand dryer models that provide efficient drying performance without causing discomfort. The trend toward quieter hand dryers enhances user satisfaction, especially in settings where noise levels are critical.

**Internet of Things (IoT) Integration:** The integration of IoT technology is gradually entering the hand dryer market. IoT-enabled hand dryers can offer real-time data on usage patterns, maintenance requirements, and energy consumption. This data-driven approach empowers businesses to optimize their operations, improve user experiences, and streamline maintenance processes.

**Eco-Friendly Materials and Packaging:** In addition to energy efficiency, sustainability extends to the materials used in hand dryer manufacturing and their packaging. Businesses are seeking products aligned with their eco-friendly values, encouraging manufacturers to explore sustainable materials and packaging solutions.

### Segmental Insights:

**Product Type Insights:** In 2023, the jet hand dryer segment held the largest market share and is predicted to continue expanding in the years ahead. The prevalence of jet air hand dryers is influenced by factors such as consumer preferences, location types, installation costs, and perceived effectiveness. Jet air hand dryers are often associated with faster drying times and enhanced hygiene, making them appealing to businesses prioritizing efficiency and cleanliness. However, they might also entail higher initial costs and energy consumption compared to hot air hand dryers.

**End User Insights:** In 2023, the hospitality segment accounted for the largest share of overall revenue, and this share is expected to increase throughout the forecast period. This can be attributed to the rapid growth of the hospitality industry driven by a surge in restaurants, pubs, hotels, and increased tourism activities in the country. The hospitality sector, encompassing hotels, restaurants, and cafes, places a strong emphasis on customer experience. Hand dryers are widely adopted in these establishments to provide guests with convenient and efficient hand drying options. High-speed hand dryers are particularly favored as they align with the expectations of rapid service and hygiene standards.

**Regional Insights:** In 2023, the southern region established itself as a dominant player with significant revenue share. This dominance is expected due to major urban centers in southern India such as Bengaluru, Chennai, Hyderabad, and Kochi, known for economic growth and technological advancements. These cities host diverse commercial spaces including IT parks, malls, and business districts where modern amenities like hand dryers are in demand. Additionally, the southern region is known for its tech-savvy population with a higher propensity for adopting digital solutions. This tech-awareness could extend to other aspects of modern living, including hygiene and convenience, driving the demand for touchless and efficient hand dryers.

#### Key Market Players

Dolphy India Pvt Ltd.

Avro India

ORCHIDS INTERNATIONAL

Dyson Technology India Pvt Ltd

Mitsubishi Electric Corporation Panasonic Corporation

Euronics Industries Pvt Ltd

Saniflow Hand Dryer Corporation

Toshi Automatic Systems Pvt. Ltd.

Taishan Jieda Electrical Co. Ltd

CERA Sanitaryware Limited

Report Scope:

In this report, the India Hand Dryer Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Hand Dryer Market, By Product Type:

Jet Air Hand Dryers

Hot Air Hand Dryers

India Hand Dryer Market, By End User:

Shopping Mall

Hospitality

Educational Institution

Corporate Office

Healthcare

Others

India Hand Dryer Market, By Region:

North

South

East

West

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Hand Dryer Market.

## Available Customizations:

India Hand Dryer Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).



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