



1st Edition

Industrial and Institutional Hand Care: U.S. Market Analysis and Opportunities

Published December 2015

Base year: 2015

Forecasts to: 2020

Regional Coverage: United States

This comprehensive assessment of the U.S. away-from-home hand care market is based on structured research with hundreds of end users to understand market trends and opportunities, product preferences, consumption patterns, and forecast sales of the hand care market. This report examines hand care usage across a broad group of end-use segments in the healthcare, hospitality, and other industrial and institutional sectors. Hand care products used in food service and janitorial tasks are included, providing a comprehensive market view including both “front-of-house” and “back-of-house.”

This Report Helps Subscribers to:

- Understand the market size of hand care products across multiple end uses and product categories
- Gain insights on the competitive landscape in hand care
- Learn which end-use segments and product categories are growing and why
- Discover end users’ preferences for product form
- Evaluate objective sales forecasts through 2020 for hand care products



Report Contents

Introduction

Provides scope, data sources, and methodology

Executive Summary

This chapter provides the following:

- An overview of I&I hand care across the food service, janitorial, and wipes segments
- Market size and segmentation, market size, trends and opportunities
- Sales by end use and product category
- Competitive landscape
- Outlook and forecasts to 2020

End-use Segments

For each end-use segment shown in Table 1, the following information is provided:

- Overview and structure of the end-use segment
- Hand care market trends
- Sales from 2013-2015
- Preferred product forms, suppliers, and forecasts to 2020

Product Categories

For each product category shown in Table 2, the following information is provided:

- General information on hand care product categories including total sales and sales by end use from 2013-2015 and forecast sales to 2020

Suppliers

Brief profiles of major hand care suppliers including description of each company’s business, location, products, and hand care sales. A representative list is shown in Table 3.

Table 1: End-use Segments Profiled

Building service contractors
Government facilities
Hospitals
Industrial facilities and office buildings
Lodging establishments
Nursing homes/assisted living facilities
Recreational facilities
Restaurants
Retailers
Schools/universities

Table 2: Product Categories Profiled

Bar soaps
Hand cleaning wipes
Hand sanitizer wipes
Instant hand sanitizers
Liquid and foam hand soaps
Powdered and waterless hand soaps



Table 3: Suppliers Profiled

Colgate-Palmolive

Deb USA (SC Johnson)

Ecolab

GOJO

Henkel

Hillyard

Kimberly-Clark

PDI/Sani Professional

P&G Professional

Reckitt Benckiser

SCA Hygiene Products

Sealed Air

Spartan Chemical

STERIS

Zep





Scope

This comprehensive report on the I&I hand care market covers away-from-home purchases of hand care products including liquid and foam hand soaps, instant hand sanitizers, hand cleaning wipes, hand sanitizing wipes, bar soaps, and powdered and waterless hand soaps. Paper products are excluded. End users in both food service and janitorial settings are included across a wide variety of industrial and institutional end users and building service contractors. Hand cleaning and hand sanitizing wipes are included. Sales data is provided from 2013-2015 and forecasts are given through 2020.

Key Benefits

Subscribers to this report are able to use its data and insights to understand:

- The role of contract cleaners and their impact on the hand care market
- Buying and consumption patterns among various customer groups and factors that influence purchasing decisions
- End users' preferences for hand soap product form
- Evolving distribution channels including distributors, direct sales, retail, and online sales
- Outlook for future growth and opportunities



Methodology

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

Primary Research

We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline's analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- End users
- Trade organizations

Secondary Research

We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline's internal database, consisting of over half a century's syndicated research.

Comprehensive Market Intelligence

We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline's proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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