

Hazmat Suits - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 112 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The hazmat suits market is valued at USD 7.14 billion and is expected to reach USD 10.27 billion by the year 2028, registering a CAGR of 7.55% over the forecast period.

The COVID-19 pandemic had a significant impact on the market's growth. To avoid infections with COVID-19, the demand for personal protective equipment increased during the pandemic. For instance, as per the PubMed article published in December 2021, there was an increase in the use of personal protective equipment (PPE) as a sanitary measure against the new coronavirus (SARS-CoV-2), and most governments had enforced the use of PPE in public areas such as hospitals, clinics, airports, and other public places. Hazmat suits are the type of PPE used in areas with a high chance of contamination. Hence, the increasing use of PPE amid the COVID-19 outbreak boosted the market's growth over the pandemic. Currently, the market has reached its pre-pandemic nature in terms of demand for hazmat suits and is expected to witness strong growth.

Factors such as strict law enforcement on employee safety and increased demand for hazmat suits due to the high prevalence of chronic viral diseases are expected to bolster demand for hazmat suits, thereby driving market growth. There is increasing demand for biotechnology and pharmaceuticals for drug discovery and development owing to increasing chronic viral infectious diseases. As per data updated by the WHO in July 2022, several confirmed and probable cases of Ebola virus diseases were detected in the Democratic Republic of the Congo between April 23 and July 3, 2022, with a 100% fatality ratio. As it is one of the most dangerous and life-threatening infectious diseases and there is a lack of good vaccines, doctors treating epidemic diseases rely on cumbersome PPE for their safety. In addition, an article by Maya Prabhu, published in Gavi.org in August 2021, stated that modern hazmat suits work against Ebola infections. The same source mentioned that modern high-tech hazmat suits are proven to be used in the chemical and nuclear sectors. They also found their earliest adaptation to medical practice during the Ebola virus outbreaks. Therefore, with the increase in such infectious outbreaks, the demand for hazmat suits is increasing and is anticipated

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

to boost the market studied.

Furthermore, several other types of research describe the use of hazmat suits for various purposes and are increasing the demand for the suits. According to the article published in January 2022 by the Occupational Safety and Health Administration, the law related to the regulations of Hazmat suits is found under Appendix B to 1910.120, and the law specifies the bare minimum safeguards that must be in place. Employers must adhere to these regulations but also customize Hazmat PPE for the circumstances and hazardous materials that employees will face. These rules and regulations for the compulsory use of the suits are anticipated to drive the market's growth.

Therefore, owing to the factors above, the market is anticipated to witness growth over the forecast period. However, limitations associated with Hazmat Suits and a lack of training provided to caregivers on their efficient use may impede the market's growth.

Hazmat Suits Market Trends

Pharmaceutical Industry Segment is Expected to Hold the Largest Share of the Market

The pharmaceutical industry segment is expected to grow during the forecast period. There is an increasing number of pharmaceutical companies globally that are solely focused on developing drugs and active pharmaceutical ingredients that use various chemicals, and workers are at risk of exposure to chemicals and hazardous materials that affect their respiratory health. Thus, the use of hazmat suits in the pharmaceutical industry is anticipated to grow, driving the segment's growth.

In addition, novel drug development in the pharmaceutical industry is expected to drive market growth in this segment. As per the data updated by the International Federation of Pharmaceutical Manufacturers and Associations, "Facts & Figures Report 2021", as of February 2021, approximately 382 vaccine candidates were in development, among which 24 were in Phase I, 34 were in Phase II, and 23 were in Phase III trials. In addition, according to the Journal Pharmaceutical Research and development (R&D) - statistics & facts data published in November 2021, there were nearly 5,100 pharmaceutical companies with active R&D pipelines in 2021. Also, there were over 18,600 drugs that were in various stages of development worldwide. These increasing numbers of drugs are predicted to increase the potential hazardous impact on workers in the workplace. Thus, the demand for hazmat suits is expected to increase at the drug production sites, thereby driving the market segment's growth.

Moreover, individuals working in drug and antibiotic factories often encounter issues related to breathing and work-related asthma. A PubMed article published in September 2021 stated that even though pharmaceutical factories are generally clean and well-maintained workspaces, air contamination through chemical hazards or pharmaceutical ingredients has been a significant occupational health and safety (OHS) issue within the pharma industry. This sometimes leads to acute (short-term) or chronic (long-term) respiratory effects among the workers. Hence, with the increase in drug development and manufacturing processes, the risk of acquired occupational respiratory diseases is also expected to rise. Thus, such instances are anticipated to increase the demand for hazmat suits across pharmaceutical industries.

Therefore, the factors above are anticipated to drive the segment's growth over the forecast period.

North America is Anticipated to Witness High Growth Over the Forecast Period

North America is expected to dominate the hazmat suits market over the forecast period. An increasing number of research and development (R&D) activities and investments in the sector, new product launches, and increasing chronic infectious diseases are major factors attributed to the market growth in the region.

Most pharmaceutical companies spent about one-quarter of their revenues on average on R&D expenses, which was nearly twice

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

as large a share of revenues as they spent in the last decade, as per the United States Congressional Budget Office report published in April 2021. These pharmaceutical expenditures in the country are expected to increase the number of workers required for pharmaceutical operations in the industry. This is expected to create a demand for hazmat suits, which are required for employee protection, thus driving the growth of the studied market in the country.

Moreover, the data updated by Statistics Canada in January 2022 mentioned that the pharmaceutical sector's research and development are important to the Canadian economy and the sector contributed more than USD 15 billion in direct value added to the Canadian economy. This high investment in the pharmaceutical sector in the country complements the increasing workforce engaged in pharmaceutical development. Thus, such instances are anticipated to increase the demand for hazmat suits, contributing to the market's growth.

Therefore, the abovementioned factors are expected to drive the market's growth over the forecast period.

Hazmat Suits Industry Overview

The market for hazmat suits is consolidated and consists of a few major players. Most of the companies that are dominating the market are based in the United States. The major players in the hazmat suits market share are actively developing new products and engaging in partnerships to expand their market presence. 3M Company, Drägerwerk AG Co., DuPont Inc., Halyard Health Inc., Kimberly Clark Corporation, and Lakeland Industries Inc. are some of the major market players.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Strict Law Enforcement on Employee Safety

4.2.2 Increasing Demand for Hazmat Suits Due to High Prevalence of Various Chronic Viral Diseases

4.3 Market Restraints

4.3.1 Limitations Associated with Hazmat Suits

4.3.2 Lack of Training Provided to Caregivers on Efficient Use of Equipment

4.4 Porter's Five Forces Analysis

4.4.1 Bargaining Power of Buyers/Consumers

4.4.2 Bargaining Power of Suppliers

4.4.3 Threat of New Entrants

4.4.4 Threat of Substitute Products

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION (Market Size by Value - USD)

5.1 By Type

5.1.1 Level A

5.1.2 Level B

5.1.3 Level C

5.1.4 Level D

5.2 By Application

5.2.1 Chemical Waste

5.2.2 Infection Control

5.2.3 Bio-hazard and Hazardous Material

5.2.4 Fire/High Temperatures

5.3 By End-User

5.3.1 Pharmaceutical Industry

5.3.2 Biotechnology Industry

5.3.3 Other End Users

5.4 By Geography

5.4.1 North America

5.4.1.1 United States

5.4.1.2 Canada

5.4.1.3 Mexico

5.4.2 Europe

5.4.2.1 Germany

5.4.2.2 United Kingdom

5.4.2.3 France

5.4.2.4 Italy

5.4.2.5 Spain

5.4.2.6 Rest of Europe

5.4.3 Asia-Pacific

5.4.3.1 China

5.4.3.2 Japan

5.4.3.3 India

5.4.3.4 Australia

5.4.3.5 South Korea

5.4.3.6 Rest of Asia-Pacific

5.4.4 Middle-East and Africa

5.4.4.1 GCC

5.4.4.2 South Africa

5.4.4.3 Rest of Middle-East and Africa

5.4.5 South America

5.4.5.1 Brazil

5.4.5.2 Argentina

5.4.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE

6.1 Company Profiles

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.1.1 3M
- 6.1.2 ANSELL LTD
- 6.1.3 DGD HAZMAT
- 6.1.4 Dragerwerk AG & Co. KGaA
- 6.1.5 DuPont
- 6.1.6 Halyard Health Inc.
- 6.1.7 Kimberly-Clark Worldwide, Inc.
- 6.1.8 Kappler
- 6.1.9 Lakeland Inc.
- 6.1.10 Lancs Industries
- 6.1.11 MATISEC
- 6.1.12 Respirex

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Hazmat Suits - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 112 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-06
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com