

Personal Protective Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 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 Personal Protective Equipment Market size is estimated at USD 27.43 billion in 2024, and is expected to reach USD 51.13 billion by 2029, growing at a CAGR of 13.26% during the forecast period (2024-2029).

The rapid growth in the construction industry and the rising industrial awareness of employee protection at the workplace are the major factors driving the growth of the personal protective equipment market.

Key Highlights

- With the COVID-19 pandemic affecting nearly 183 million people globally (as of July last year), an unprecedented demand for healthcare safety and prevention products, such as gloves, face masks, coveralls, gowns, goggles, and face shields, has been witnessed. As a result, the previously estimated PPE kits market growth increased significantly. The COVID-19 pandemic resulted in limited production of other industrial products, and many industrial product manufacturers shifted toward PPE production, resulting in a sharp rise in some regional ecosystems.
- Occupational Safety and Health Administration (OSHA) requires that different categories of PPE should meet or be equivalent to standards developed by the American National Standards Institute (ANSI). With ANSI preparing safety standards since the 1920s, the protection of the heads and eyes of industrial workers was approved back then. Falling is one of the leading causes of death on construction sites; therefore, using appropriate protective gear like a safety harness or respirators to protect the lungs from hazardous gases, vapors, and particles becomes important.
- Infection Control requires specific PPE with the intention for use across medical space, which must follow FDA's regulations. Also, on the vendor front, adherence to meet voluntary consensus standards for protection is applicable across surgical masks, N95 respirators, medical gloves, and gowns.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Personal Protective Equipment (PPE) Market Trends

Surgical Masks and N95 Respirators to Experience Significant Growth

- Surgical masks are personal protective equipment used to protect the wearer from airborne particles and liquid contaminating the face in a mainstream application. A study conducted by the NIOSH revealed that nearly 78% of respondents reported using surgical masks for one or more hazards, which recorded applications toward 14% for ribavirin and over 90% for surgical smoke.
- Therefore, surgical masks have been used across situations where respiratory protection is recommended, for instance, compounding or administering antineoplastic drugs and working in the vicinity of surgical smoke. While a surgical mask may be effective in blocking splashes and large-particle droplets, blocking tiny particles transmitted by coughs, sneezes, or certain medical procedures, make these masks unfit to be used more than once.
- The N95 Respirators, on the other hand, are similar to European-based FFP2 and FFP3 standard masks, which are recognized as ideal for protecting the nose and mouth area from imparting or inhaling virus-led particles. Wearing face masks became usual and ubiquitous, not only in hospitals but in all public places due to COVID-19, which led to the overconsumption of surgical and N95 masks by the general public. This further led to immense supply shortages of surgical and N95 masks for healthcare workers in the frontline of patient care, as reported across several countries.
- Companies have been growing their market presence through various strategic developments. For instance, in August 2022, Optrel, a respiratory protection manufacturer, introduced the P Air Clear, the NIOSH-approved N95 respirator with a clear window. The P Air Clear is a significant advancement for educators, healthcare workers, geriatrics, and the deaf and hard-of-hearing community. It provides the maximum level of protection with the added benefit of a clear window, removing the communication barrier posed by traditional masks.
- Moreover, in May 2022, Project N95 collaborated with Harvard University's FXB Center for Health and Human Rights to provide 1 million free respirators to local communities. Engaging with 23 community groups in ten states, the partners gave over 500,000 respirators with the support of a significant donation of 500,000 N95s to Project N95 by Lakeland, Florida-based medical device manufacturer Advanced Concept Innovations (ACI).

North America is Expected to Hold Significant Market Share

- Stringent government regulations regarding worker safety have forced companies to inculcate personal protective equipment and prevent fatalities at work. Regional product demand for the healthcare sector and rising awareness of preventing the spread of COVID-19 also fostered sales in the personal protective equipment market in the region.
- According to a report published by Statistics Canada in 2021, two-thirds (66.1%) of businesses in Canada said they needed or anticipated needing personal protective equipment (PPE) to operate per COVID-19 public health guidelines. Businesses in the services-producing sector were most likely to need PPE, led by those in educational services (92.1%), healthcare and social assistance (84.3%), retail trade (84.0%), and accommodation and food services (79.5%).
- Manufacturers in the region have been investing in product R&D activities and capacity expansions to cater to the increasing PPE demand and have an affirmative impact. For instance, in May 2022, Honeywell International Inc. introduced two new NIOSH-certified respiratory products, the DC365 and RU8500X series masks, to assist healthcare personnel. These additional products expand Honeywell's portfolio of personal protective equipment (PPE).
- Moreover, the United States has a presence of principal market players that are engaged in the manufacturing of PPE. The likes of 3M Co., MSA Safety Inc., Ansell Limited, Honeywell International Inc., El DuPont de Nemours and Co., Kimberly-Clark Corporation, Lakeland Industries, Inc., and Radians, Inc., among others, are also promoting the growth of the market in the region.
- Further, the growing number of occupational accidents, along with the requirement for highly durable mechanical wear

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

resistance and protective gear in oil and gas, automotive, refining, and metal manufacturing businesses, should drive the personal protective equipment market trends. Increasing workplace hazards along with poignant regulatory framework by Occupational Safety and Health Administration to assure employee safety is anticipated to drive the market growth in North America.

Personal Protective Equipment (PPE) Industry Overview

The Personal Protective Equipment Market is concentrated and is dominated by a few major players like 3M Company, Honeywell International, Inc., Alpha Pro Tech, Ansell Ltd., and Avon Protective Systems. These major players, with a prominent share of the market, are focusing on expanding their customer base across foreign countries. These companies are leveraging strategic collaborative initiatives to increase their market share and increase their profitability. However, with technological advancements and product innovations, mid-size to smaller companies are growing their market presence by securing new contracts and by tapping new markets.

In February 2022, Trivitron Healthcare developed a technology for space-grade radiation protection aprons. The SpaceD Radioprotection Apron was created particularly for healthcare professionals who spend extensive hours in surgery and imaging laboratories.

In January 2022, Airxom, a French medical technology company, introduced an active mask that filters micro and nanoparticles and offers protection against viruses (like SARS-COV 2), germs, and volatile organic compounds (nitrogen monoxide, NOX, benzene, toluene, etc.).

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 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.2.1 Bargaining Power of Suppliers
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Threat of Substitute Products
 - 4.2.5 Intensity of Competitive Rivalry
- 4.3 Assessment of the Impact of COVID-19 on the Market
 - 4.3.1 Production Dynamics (New Production Capacities, Pure Play PPE Vendors vs Other Production Facilities)
 - 4.3.2 Import and Export Regulations Due to COVID-19

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

4.3.3 Top 10 PPE Importing and Exporting Countries (in USD Thousands) 2015 to 2019, 2020 (January To May)

4.4 Market Drivers

4.4.1 Increasing Incidence of Pandemics and Epidemics

4.4.2 Rising Adoption of Cost-effective and Innovative Surgical Procedure

4.4.2.1 Growing Incidence of Pandemics and Epidemics

4.5 Market Challenges

4.5.1 Issues regarding Disposal and Awareness

4.5.2 Supply Shortages

5 MARKET SEGMENTATION

5.1 Product

5.1.1 Surgical Masks

5.1.2 Respirator Masks (US-based Filter Class (Covers Analysis of Filter Class, such as N-Series, P-Series, and RSeries) and European Filter Class (Covers Analysis of Filter Class, such as FFP1, FFP2, and FFP3))

5.1.3 Gloves

5.1.4 Suits or Coveralls

5.1.5 Aprons

5.1.6 Other Products (Protective eye wear, goggles, etc.)

5.2 Geography

5.2.1 North America

5.2.2 Europe

5.2.3 Asia-Pacific

5.2.4 Rest of the World

6 COMPETITIVE INTELLIGENCE

6.1 Company Profiles*

6.1.1 3M Company

6.1.2 Ansell Limited

6.1.3 Cardinal Health Inc.

6.1.4 DuPont de Nemours Inc.

6.1.5 Dynarex Corporation

6.1.6 Honeywell International Inc.

6.1.7 Kimberly-Clark Corporation

6.1.8 Top Glove Corporation Bhd

6.1.9 Microgen Hygiene Pvt. Ltd

6.1.10 Prestige Ameritech

7 INVESTMENT ANALYSIS and MARKET OUTLOOK

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Personal Protective Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 120 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-26"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

