

Hand Care Products Market Assessment, By Product [Hand Moisturizers, Hand Washes, Hand Sanitizers/Disinfectants, Others], By Category [Organic and Herbal, Synthetic], By Formulation [Gel, Cream, Foam, Others], By Fragrance [Scented, Non-Scented], By Price Range [Mass Segment, Premium Segment, Luxury Segment], By Application [Residential, Commercial], By End-user [Infants and Children, Adults], By Distribution Channel [Offline, Online], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global hand care products market is projected to witness a CAGR of 8.20% during the forecast period 2024-2031, growing from USD 9.26 billion in 2023 to USD 17.40 billion in 2031. Factors such as increasing demand for gentle and hydrating hand care products, expansion of the online retail segment to offer convenience to the consumers, and introduction of organic and chemical-free formulations are fostering the growth of the global hand care products market in the forecast period.

Moreover, the introduction of hybrid and functional products that help maintain hygiene and offer other benefits, such as skin-enhancing, anti-aging, and super-moisturization benefits, appeals to consumers more. Consumers seek hand care products that cater to their specific needs apart from the daily hydration and cleanliness provided by them.

The development of specialized hand care products catering to specific concerns such as eczema, sensitive skin, and aging are driving the growth of the hand care products market. According to National Eczema Association, 31.6 million people i.e., 10.1% people in the United States have some form of eczema.

Advanced formulations which are moisturizing and environmentally friendly are preferred by the consumers as they are mild on

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the skin and gentle on the environment. It is supported by the demand for organic and natural skincare products which continue to gain popularity among consumers. For instance, in March 2022, PURELL, a GOJO Industries, Inc. brand, launched its latest foam hand sanitizers, Advanced Hand Sanitizer Naturals Foam and Advanced Hand Sanitizer 2in1 Moisturizing Foam. Advanced Hand Sanitizer Naturals is made from plant-based ethanol containing 91% biobased content, while Advanced Hand Sanitizer 2 in 1 Moisturizing Foam is formulated with Vitamin B3 and E, essential oils, and antioxidants. Both products are free from harsh chemicals such as dyes, phthalates, parabens, triclosan, and preservatives.

Surging Awareness of Skincare Among Consumers to Augment the Market Growth

An increase in consumers' awareness regarding the benefits of skincare and the importance of incorporating hand care products into their daily skincare regimes is driving the growth of hand care products globally. The increase in consumers' awareness is due to their increasing exposure to skincare information available to them through various beauty blogs, social media, and dermatological recommendations, which advocate the need for a comprehensive skincare routine, including the hands.

Hands are usually exposed to hostile environmental conditions and repetitive sanitizing and washing, which dehydrate and irritate the skin and cause premature aging. As consumers become more aware of the adverse effects and consequences of ignoring hand care, they begin to take a greater interest in products specifically designed to care for hands. Such products usually contain highly moisturizing ingredients for skin repair and protection, such as hyaluronic acid, shea butter, and vitamins, helping keep the skin soft and moisturized.

In May 2024, Aesop launched Eleos Aromatique Hand Balm, which cures parched and weathered hands, making them baby-soft. The product does not leave any oily residue behind, offering a fast-absorbing formula that dries to a velvety matte finish. The product, developed with a skin-softening formula, contains alluring fragrance notes, including Clove Bud, Patchouli, and Cedar Atlas.

Increasing Usage of Hand Care Products Due to Spread of Diseases

Consumers are increasingly using hand care products such as handwashes and hand sanitizers due to the risk of spreading diseases and infections from dirt. The rising risk of infections acquired from hospitals and other chronic infections has led to an increase in consumers' preference to prevent them.

As found by the U.S. Centers for Disease Control and Prevention (CDC) in 2024, approximately 1.8 million children under the age of 5 die each year from diarrheal diseases and pneumonia. Handwashing with soap has the potential of protecting about 1 out of 5 children with respiratory infections such as pneumonia and 1 out of every 3 children from diarrhea, as it helps kill germs.

Healthcare workers, non-profit organizations, and governmental groups spread continuous awareness and consciousness among consumers about the importance of hand care through various educational programs and campaigns, boosting the demand for hand care products.

Manufacturers are advertising their products through innovative marketing campaigns that spread awareness of the importance of personal hygiene by using hand washes and hand sanitizers. For instance, in April 2023, Dettol, a brand of Reckitt Benckiser Group PLC, released its latest campaign urging consumers to use liquid handwash over soaps. The advertisement revolves around the theme 'soap sharing leads to germ sharing', hence offering the consumers their latest improved liquid handwash, which dispenses untouched and uncontaminated liquid soap.

Hand Moisturizers to Hold a Significant Market Share

Hand moisturizers hold a significant market share as they nourish the skin and restore its natural texture, keeping it soft and supple. Hand moisturizers are essential to consumers' skincare regime, supporting its global demand.

Additionally, the spread of consumer awareness of the significance of skincare is fostering the demand for hand moisturizers.

Consumers are increasingly incorporating hand moisturizers into their holistic skincare routine. They seek products that nourish them, for instance, offerings formulated with shea butter, hyaluronic acid, aloe vera, and vitamins to address their specific skin concerns.

The manufacturers are introducing different formulations of hand moisturizers, such as hand yogurts, which are relatively thicker than the traditional hand creams and, thus, offer extra moisturization to the consumers. While other formulations, such as hand mousse, are lighter in texture than hand cream. In April 2024, Footlogix, a brand of KvG Group Inc., introduced its hydrating hand mousse. The hand mousse is not a conventional moisturizer but is infused with dermal infusion technology, which carries active ingredients into the layers of the epidermis rather than just sitting on the top of the skin like other traditional moisturizers, helping

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restore healthy skin.

Asia-Pacific to Exhibit a Significant Market Share

Asia-Pacific holds a significant share over other regions in the global hand care products market due to several factors.

Asia-Pacific has a rapidly growing middle-class population with a rapid increase in disposable income, contributing to higher spending on personal care and beauty products and increasing the demand for hand care products in the region.

Moreover, the rapid economic and infrastructural growth in the region, including countries such as China, India, Singapore, and Japan, is allowing exposure to multinational brands, making consumers aware and conscious of their skincare, increasing the willingness to spend on quality skincare products, and propelling the growth of the hand care products market.

Hand care companies are extending their operations in the region more aggressively over other regions, helping them position themselves in a more diverse market. For instance, in May 2024, Bath & Body Works, Inc. partnered with Shinsegae Department Store to expand its product range in South Korea. The partnership symbolizes the exclusive distribution agreement between the two, which will allow Shinsegae to sell 301 Bath and Body Works products, including their hand creams. These hand creams, along with other products of the company, are made available on SSG.com, SI Village, and Chicor.com, with an anticipated launch on Kakao Talk Gifts in June.

Future Market Scenario (2024 - 2031F)

The hand care products market is anticipated to surge in the forecast period due to several key factors and trends driving consumers to demand the latest hand care products. Increasing consumer demand for multi-functional products that offer multiple benefits, such as hydration, anti-aging, and UV protection in a single application, is gaining traction in the market. Advancements in the formulation of hand care products, such as the introduction of effective and clean formulations and innovations such as smart packaging, which helps consumers dispense the adequate amount without the wastage of the product, are expected to flourish in the market growth.

Incorporation of technology such as data analytics and artificial intelligence for product recommendations while online shopping, enabling the consumers to pick products specific to their requirements, enhances the experience of the consumers. Moreover, personalization in the hand care products, such as offering tailored hand care products depending on the skin type and skin concerns of the buyers, further appeals to the consumers, projecting a higher growth in the foreseeable future.

Key Players Landscape and Outlook

Key players in the market are helping the growth by focusing on continuous product innovation, retail expansions, and strategic marketing. The manufacturers are actively expanding their product portfolio, increasing the base of the customers, and catering to their evolving needs.

The key players are incorporating sustainable packaging in their product offering, with an aim to reduce wastage and increase the recyclability of the product. For instance, in September 2023, L'Occitane International S.A. partnered with Albea Group to revamp the packaging of its iconic 30ml hand cream collection, started with its shea butter version, which was launched in January 2024 in the market. The company replaced its Aluminum Barrier Laminate (ABL) tube with a Greenleaf tube, which incorporates the OctoTop opening system, enabling recyclability. The move helped in reducing 23% of the overall weight of the tube.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

14. □ Strategic Recommendations

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