



2nd Edition

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

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Base year: 2020

Forecasts to: 2025

## Regional Coverage: United States

This report helps assess the impact of COVID-19 on professional hand care sales in 2020 and makes scenario forecasts for future sales. 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, and consumption patterns while forecasting sales of the hand care market. This report examines hand care usage across a broad group of end-use segments in healthcare, hospitality, education, foodservice, and other industrial and institutional sectors. Hand care products used in foodservice and janitorial settings are included, providing a comprehensive market view including both “front-of-house” and “back-of-house” hand care.

## This Report Helps Subscribers to:

- Learn how COVID-19 is impacting consumption patterns and usage
- 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 2025 for hand care products
- Analyze the relative size of hand soaps, hand sanitizers, and hand cleaning wipes
- Recognize trends in antibacterial hand soap usage



# Report Contents

## Introduction

Provides scope, data sources, and methodology

## Executive Summary

This chapter provides the following:

- An overview of institutional and industrial hand care across foodservice, janitorial, and wipes segments
- Market size and segmentation, market share, trends, and opportunities
- Sales by end use and product category
- Competitive landscape
- Outlook and forecasts to 2025

## 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 of hand care products in 2019 and 2020
- Preferred product forms, suppliers, and forecasts to 2025

## Product Categories

For each product category shown in Table 2, general information on hand care product categories, including total sales by end use in 2019 and 2020 with forecast sales to 2025, is provided.

## Suppliers

Brief profiles of major hand care suppliers are shown in Table 3, including a description of each company’s business, location, products, and hand care sales in 2019 and 2020.



**Table 1: End-use Segments Profiled**

Building service contractors or contract cleaners
Hospitals
Industrial facilities, office buildings, and government facilities
Lodging establishments
Nursing homes/assisted living facilities
Restaurants (includes fast food/QSRs, fast casual, and full service)
Retailers
Schools and universities

**Table 2: Product Categories Profiled**

Bar soaps
Foam hand soaps
Hand cleaning wipes
Hand sanitizer wipes
Heavy duty (pumice/grit) hand soaps
Instant hand sanitizers
Liquid hand soaps



**Table 3: Suppliers Profiled**

3M

Betco

Clorox Professional

Colgate-Palmolive

Diversey

Ecolab

Essity/Tork/SCA Hygiene Products

Georgia-Pacific

GOJO

Henkel

Hillyard

Kimberly-Clark

PDI/Sani Professional

Procter & Gamble Professional

Reckitt Benckiser Professional

SC Johnson (Deb USA)

Spartan Chemical

Zep, Inc.





## Scope

This comprehensive report on the industrial and institutional 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 sanitizer wipes, bar soaps, and industrial heavy-duty hand soaps. Paper products are excluded. End users in both foodservice and janitorial settings are included across a wide variety of industrial and institutional end users and building service contractors. Includes assessment of the impact of COVID-19 on professional hand care market now and in the future. Both “front-of-house” and “back-of-house” areas of facilities are included. Sales data is provided for 2019 and 2020 and forecasts are given through 2025.

## 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
- Trends in antibacterial hand soap usage
- 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 insights are accurate, current, and reliable. Building on our 60-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.



During the course of field research, we conduct a two-pronged primary research approach to understand this market. This methodology has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research represents the major component of the overall research methodology for this report.

- First, in order to understand the market from the end user's perspective, Kline conducts hundreds of structured surveys with a wide range of end users to understand how hand care products are used, where they are purchased, and how changing trends impact this market.
- Second, our professional consulting staff conducts in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including suppliers, distributors, regulators, industry associations, and other key trade sources.

### 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 more than 60 years of 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 more than 60 years.

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