

Large-scale normalization after the pandemic years



In the course of the Covid pandemic, The production volumes for respiratory protection products rapidly worldwide increased

The corona pandemic has really shaken up the markets for personal protective equipment. While the eye protection sector initially benefited later, it was primarily respiratory protection products that benefited above average from the exceptional market situation. Other segments experienced restrictions. In the meantime, the market has largely normalised again. The increase compared to the normal year 2018 is largely due to cost increases.

The spread of the Covid-19 pandemic to Germany in 2020 resulted in explosive growth the German market for personal protective equipment as a result. The extreme increase in demand for products designed to prevent the spread of the virus, as well as the significant price increases that against the backdrop of an impending shortage and the associated hoarding, caused the sales volume of the more than double of the PPE market. The actual expenditure on pandemic-relevant hygiene products in Germany were even significantly higher, as the market analysis only included items that comply with the PPE guidelines and that are used in a working environment by employees.

First eye protection, then respiratory protection

Because infection with the Covid virus via the retina was initially assumed to be the main route of transmission, demand for eye protection products rose rapidly in Spring

2020. With the realisation that the disease spreads primarily via the respiratory tract, respiratory protection then came to the fore, so that the available goods on the PPE market were very quickly sold out. Over the course of the year, however, production volumes worldwide and also through the establishment of production in Germany. Demand for cleaning and care products for skin protection as well as disposable protective suits and especially disposable gloves experienced an extreme increase in demand.

Prescription safety spectacles and earmoulds were in particular negatively affected during this which have to be customised through personal contact be made in personal contact.

This phase was particularly negatively affected prescription safety glasses and earmolds which have to be adjusted and made in personal. Here, the contact restrictions had a strong negative impact on marketing conditions.

The reduction in the volume of work during the lockdown phases in 2020 affected products

such as earplugs and hand protection, that have fast replacement cycles. Here, consumption and therefore the sales potential declined

immediately. In contrast, products with longer replacement cycles, e.g. safety shoes or head protection products, on the other hand, showed contact restrictions and lockdown phases did not have any major lasting effects, as procurements were generally made up for.

FFP masks: Expiring warranty periods will ensure that stocks are emptied

In 2022, the sales volumes of hygiene PPE were each below those of the normal year 2018 in each case. The providers in this area are confronted with the fact that the warehouses of retailers and end customers are still very full. This problem will be solved most quickly with FFP-masks because the warranty period expires after just three years, meaning that large quantities will have to be disposed of this year and next. In the case of higher-value products such as safety shoes or reusable clothing, the position of suppliers based in Eastern Europe or, as in the case of foot protection, in Germany will still be significantly stronger in 2022 than before the pandemic. Companies able to deliver were able to gain new customers.

Providers also benefit from the fact that in a labor market shortage of skilled workers, design-oriented and comfortable protective equipment is used as an appreciation and motivation factor. This trend is also driving e.g. earmolds, corrective safety eyewear, welding helmets, helmets with a climbing design and fan-assisted respiratory protection for increasing sales potential. With total sales of EUR 2.5 billion, the German PPE market of EUR 2.5 billion in 2022, around 12% above the level of the of the normal year 2018. However, this growth will not solely driven by the qualitative growth of the market. The consequences of the Russian attack on Ukraine have caused costs for PPE manufacturers to rise sharply. This primarily relates to energy and transportation costs as well as the equally more expensive primary products.

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