

Analysis of the differentiated structures in the Western European PPE Market

macrom Marketingresearch & Consult has been analyzing the German PPE market at regular intervals since 2005. In the past almost two decades, further country analyses have been carried out on a regular basis. Now, for the first time, the entire region of Western Europe has been examined as part of a comprehensive and detailed study in order to provide market participants with a basis for planning with regard to this differentiated economic area. The region represents a main sales area of the PPE world market and includes the countries Norway, Sweden, Finland, Denmark, Great Britain, Ireland, Belgium, the Netherlands, Luxembourg, Germany, Switzerland, Austria, Italy, France, Spain and Portugal.

After the negative effects of the financial crisis had also been overcome in Southern Europe since the mid-2010s, the Western European PPE market showed continuous and dynamic growth. This growth was generated despite the fact that almost all countries in the region experienced significant losses in the number of people employed in the important core target groups of the manufacturing sector. These losses were most severe in Spain, the UK and France. By contrast, the DACH region, meaning Germany, Austria and Switzerland, was comparatively stable, further increasing the already great importance of this economic area for sales of personal protective equipment in Western Europe.

Despite this negative development in the manufacturing sector, the Western European PPE Market was able to grow because the sales potential at the level of the users of the products has increased significantly. This is primarily the result of more consistent enforcement of occupational health and safety regulations in countries such as Spain, Italy, France and the UK. At the same time, potential has been developed in the service sector, where, for example, the use of protective equipment is much more widespread in retail and logistics than it was 10 years ago. This relates particularly to the wearing of safety footwear, weather and warning protection, and hand protection. Products such as bump caps have also brought new customer groups to market participants.

However, the situation in Western Europe is still differentiated by the purchasing behavior of PPE managers. Even though the use of the products is much more consistent today, purchasing in the southern countries and in the UK is predominantly price-oriented. By contrast, above-average sales opportunities for high-quality protective equipment are available in the small Scandinavian economic region. Here, the extreme weather conditions, the high importance of jobs in industries with high physical demands such as the timber industry, fishing and the mining of natural resources, combined with a pronounced welfare attitude, have led to the above-average sales potential for quality products.

In the DACH region, and especially in Germany, the good economic situation since 2010 with increasing near-full employment has led to a strong improvement in the willingness to spend on protective products and triggered an overall up-trading. PPE has been recognized more and more as a factor to motivate employees with appealing and comfortable protective products. In principle, this trend is also decisive for the BeNeLux region, although in this small market area the potential in the manufacturing sector has been reduced to a much greater extent than in Germany, Austria and Switzerland.

With the outbreak of the COVID-19 pandemic in 2020, the Western European PPE market has experienced explosive growth and strong structural change. Yet this growth is based solely on the surge in demand for hygiene PPE such as FFP masks, soaps, and disposable gloves and suits. In the other product groups, however, market development was mainly characterized by the effects of the lockdown phases, which had an impact on consumption volumes. Products that are replaced several times per shift, such as disposable earplugs, were particularly badly affected. Losses incurred here could not be made up. By contrast, less impact was felt in product groups where replacement takes place in longer cycles. In the case of products such as safety footwear or multifunctional suits, most procurements were recovered in the course of 2020 and 2021.

The analysis now available provides fundamental planning data not only for the Western European market, but also for sales potential in the regions and countries of Western Europe. The data is shown for the nine PPE submarkets and for almost 100 product groups in the structures of the normal market up to 2019, as well as in the pandemic phase.

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über die Erfahrung, die sachlogisch und ökonomisch sinnvollen Instrumente und Methoden auszuwählen. Unsere Erfahrung in unterschiedlichsten nationalen und internationalen Märkten kommt Ihnen darüber hinaus auch im Bereich unserer Analysen und Empfehlungen zugute, denn Strukturen und Dynamik verlaufen in Märkten nach analogen Gesetzen.