

# Hand Sanitisers: The Story So Far and Underlying Prospects

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## INTRODUCTION

Scope

Definitions

## HAND SANITISERS EXPLODE AS HYGIENE TAKES CENTRE STAGE

COVID-19 pandemic created hygiene hysteria in its wake

Spending on liquid soap surpasses that of previous pandemics

Supply chain stressed across regions during the peak of the pandemic

Call to action for governments and health organisations worldwide

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“Liquid soap” regions dominated hand sanitisers sales pre-pandemic

Hand sanitiser sales exploded in 2020 across all regions, but...

...were limited by shortages, affordability and free availability

Mass and premium brands have responded alike as demand soared

Wide-scale distribution achieved in record time

Consumers' demands increase as sanitisers become part of daily routines

The boom has faded, what comes next?

## OPPORTUNITIES AND CHALLENGES POST-PANDEMIC

Sales will drop, but consumption will be higher than pre-pandemic

Hygiene concerns expected to remain top of mind among consumers

Convenience is important, but affordability is a must

Consumers' attention shifts to ingredients and additional benefits

Premiumisation, new consumer targets and offerings to support growth

Brands respond to wider encompassing needs

Regulation and substitutes expected to challenge growth post-pandemic

Environmentally-conscious consumers bring more challenges

Key takeaways and business implications

## APPENDIX

Sales of hand sanitisers by country 2019-2020: Asia Pacific and Australasia

Sales of hand sanitisers by country 2019-2020: Eastern Europe

Sales of hand sanitisers by country 2019-2020: Western Europe

Sales of hand sanitisers by country 2019-2020: North and Latin America

Sales of hand sanitisers by country 2019-2020: Middle East and Africa

Projected growth of hand sanitisers by country 2021 (54 core countries)

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