

PROTECTIVE CLOTHING MARKET

BY APPLICATION (Thermal, Chemical, Mechanical, Biological/Radiation, Visibility), **END-USE INDUSTRY** (Oil & Gas, Construction, Health Care, Mining, Military, Firefighting) **& MATERIAL**

— *Global Trends & Forecast to 2018*



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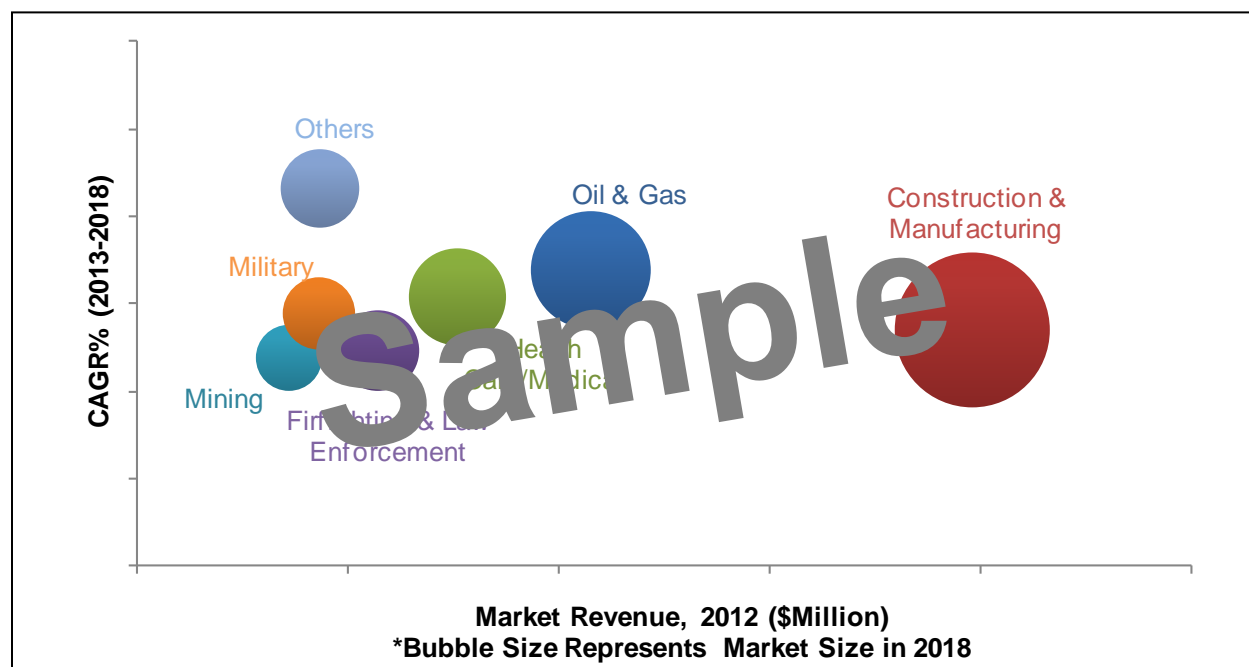
1 PREMIUM INSIGHTS

1.1 CONSTRUCTION & MANUFACTURING – THE LARGEST END-USE INDUSTRY FOR PROTECTIVE CLOTHING

Protective clothing is used in various end-use industries including construction & manufacturing, oil & gas, health care/medical, firefighting & law enforcement, and military among several others. However, the study indicates that the construction & manufacturing industry will lead the protective clothing usage globally.

FIGURE 1

PROTECTIVE CLOTHING: GROWTH MATRIX, BY END USE



Source: International Labor Organization (ILO), CCOHS.Org, ESPC, OSHA, Indexmundi, Materials Journals & Magazines, Factiva, Company Websites & Presentations, Press Releases, Expert Interviews, and MarketsandMarkets Analysis

2 MARKET OVERVIEW

2.1 MARKET SHARE ANALYSIS

In terms of the global market, the industry comprises of few large companies and many small market participants. The industry is highly fragmented in terms of the segments to which the products are offered. Due to the presence of a large number of small players, companies are constantly fighting to capture more market share. The market is highly stratified and hence the market share is company-wise. DuPont (U.S.) is the largest player in terms of volume and is followed by 3M (U.S.) and Teijin Limited (Japan). The market share analysis for the companies in the protective clothing market is detailed in the table below.

TABLE 1

PROTECTIVE CLOTHING MARKET SHARE, 2012

Company	Headquarters	<2%	3%-10%	10%-25%
3M Company	U.S.	-	-	XX
Ansell Limited	Australia	-	XX	-
Asatex AG	Germany	XX	-	-
Australian Defence Apparel	Australia	XX	-	-
Bennett Safetywear Ltd.	U.K.	XX	-	-
Bullwark Protective Apparel	U.S.	XX	-	-
DuPont	U.S.	-	-	XX
Globe Manufacturing Co. LLC	U.S.	XX	-	-
Honeywell International Inc.	U.S.	-	XX	-
Kimberly Clark Corp.	U.S.	-	XX	-

Company	Headquarters	<2%	3%-10%	10%-25%
Lakeland Industries Inc.	U.S.	XX	-	-
Lion Apparel Inc.	U.S.	XX	-	-
PBI Performance Product Inc.	U.S.	-	XX	-
Royal TenCate NV	The Netherlands	-	XX	-
Sioen Industries	Belgium	XX	-	-
Teijin Limited	Japan	-	-	XX
W. L. Gore & Associates	U.S.	XX	-	-
Waxman Fibers Ltd.	U.K.	XX	-	-
Westex Inc.	U.S.	XX	-	-
Workrite Uniform Company	U.S.	XX	-	-

Source: Expert Interviews, Company Annual Reports, and MarketsandMarkets Analysis

In 2012, DuPont dominated the market with more than XX% share of the overall protective clothing market. Its products such as Kevlar and Nomex are unparalleled. 3M (U.S.) and Teijin Aramid (a subsidiary of Teijin Limited (Japan)) were the next companies with their range of fabrics and protective clothing products. Rest of the companies occupied only a marginal market share with companies such as Ansell Limited (Australia), Honeywell International (U.S.), Kimberly Clark (U.S.), PBI Performance Products (U.S.), and Royal TenCate (The Netherlands) occupying around XX% of the global market share.

3 PROTECTIVE CLOTHING MARKET, BY APPLICATION

3.1 MARKET ANALYSIS

3.1.1 THERMAL PROTECTIVE CLOTHING TO DRIVE THE MARKET

The table below provides estimates for the application-wise revenue of protective clothing from 2011 to 2018.

TABLE 2

PROTECTIVE CLOTHING MARKET: BY APPLICATION, 2011-2018 (\$MILLION)

Application	2011	2012	2013	2018	CAGR% (2013-2018)
Thermal	XX	XX	XX	XX	XX
Chemical	XX	XX	XX	XX	XX
Mechanical	XX	XX	XX	XX	XX
Biological/Radiation	XX	XX	XX	XX	XX
Visibility	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: International Labor Organization (ILO), CCOHS.Org, ESPC, OSHA, Indexmundi, Materials Journals & Magazines, Factiva, Company Websites & Presentations, Press Releases, Expert Interviews, and MarketsandMarkets Analysis

The protective clothing market is projected to grow from \$XX million in 2013 to \$XX million by 2018 at CAGR XX% during the forecasted period. The protective clothing market in thermal application is estimated to increase from \$XX million in 2013 at a CAGR of XX% from 2013 to

2018 with the increase in the oil exploration activities globally. In 2012, the mechanical protective clothing market was valued at \$XX million and is projected to grow at a CAGR of XX% from 2013 to 2018 with an increase in the manufacturing industry globally. The biological/radiation protective clothing market is expected to grow at a faster CAGR of XX%.

4 PROTECTIVE CLOTHING MARKET, BY END-USE INDUSTRY

4.1 MARKET ANALYSIS

4.1.1 CONSTRUCTION & MANUFACTURING END-USER INDUSTRY TO DRIVE THE MARKET

The table below provides estimates for the end-user industry-wise revenue of protective clothing from 2011 to 2018.

TABLE 3

PROTECTIVE CLOTHING MARKET: BY END-USE INDUSTRY, 2011-2018 (\$MILLION)

End-Use Industry	2011	2012	2013	2018	CAGR% (2013-2018)
Oil & Gas	XX	XX	XX	XX	XX
Construction & Manufacturing	XX	XX	XX	XX	XX
Health care/Medical	XX	XX	XX	XX	XX
Firefighting & Law Enforcement	XX	XX	XX	XX	XX
Mining	XX	XX	XX	XX	XX
Military	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: International Labor Organization (ILO), CCOHS.Org, ESPC, OSHA, Indexmundi, Materials Journals & Magazines, Factiva, Company Websites & Presentations, Press Releases, Expert Interviews, and MarketsandMarkets Analysis

The construction and manufacturing industry is the leading industry in the use of protective clothing. This industry is expected to grow at a CAGR of XX% from 2013 to 2018 to reach \$XX million by 2018, up from \$XX million in 2013. Protective clothing used in the oil and gas industry will have the highest CAGR of XX% from 2013 to 2018, due to stringent regulations and increasing oil exploration activities globally. The protective clothing used in the health care industry is estimated to have an above-the-average growth rate. The construction and manufacturing, mining, military, and firefighting and law enforcement industries will have a comparatively sluggish growth rate during the next five years, as growth in the demand for protective clothing is stagnant in these segments.

5 PROTECTIVE CLOTHING MARKET, BY GEOGRAPHY

5.1 MARKET ANALYSIS

5.1.1 EUROPE

TABLE 4

**EUROPEAN PROTECTIVE CLOTHING MARKET: BY COUNTRY,
2011-2018 (\$MILLION)**

Country	2011	2012	2013	2018	CAGR% (2013-2018)
Germany	XX	XX	XX	XX	XX
France	XX	XX	XX	XX	XX
Italy	XX	XX	XX	XX	XX
U.K.	XX	XX	XX	XX	XX
Others	XX	XX	XX	XX	XX
Total	XX	XX	XX	XX	XX

Source: International Labor Organization (ILO), CCOHS.Org, ESPC, OSHA, Indexmundi, Materials Journals & Magazines, Factiva, Company Websites & Presentations, Press Releases, Expert Interviews, and MarketsandMarkets Analysis

The European market for protective clothing was \$XX million in 2012. The European market is much mature like the North American market, and is therefore experiencing slow growth. The market is expected to reach \$XX million by 2018 from \$XX from 2013, growing at a rate of XX% every year during the forecast period. Germany is the largest market in the region accounting for nearly one-fourth of the market. The German protective clothing market is expected to reach \$XX million by 2018 at a CAGR of XX% from 2013 to 2018. France, Italy, and U.K. are the other major countries in the European protective clothing market.

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