

F R O S T & S U L L I V A N

**PERSONAL PROTECTIVE EQUIPMENT & SAFETY**

*Identifying Opportunities to Accelerate Growth*

## We Identify Growth Opportunities

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Is the commoditization of private labels putting price pressures on your organization?

Are you aware of niche players bringing in technology and fresh perspectives in the PPE world?

Are you impacted by new cooperative distribution models?

Are you prepared for the entry of smart and wearable products in the industry?

As the Personal Protection Equipment (PPE) industry struggles with pricing pressures and increasing commoditization of products, strategic differentiation of products and services will separate winners from losers. The competitive landscape for the future of the industry will be different, driven by innovation, disruptive business models, and the advent of smart and wearable products transforming the workplace into a connected domain enhancing worker safety and productivity.

Frost & Sullivan's expertise provides manufacturers, distributors and end users valuable insights on various markets, products, companies to action and technology trends to help address challenges and identify opportunities to accelerate growth.

In a global environment driven by continual transformation, it has never been more crucial to understand the dynamics of supply chain forces and stay up to date with market happenings, such as emerging sales channels, trending end-user preferences, the impact of technology, and emergence of smart and connected PPE.

Over the past five decades, Frost & Sullivan has become world-renowned for its role in helping investors, corporate leaders and governments navigate economic changes and identify disruptive technologies, Mega Trends, new business models and companies to action, resulting in a continuous flow of growth opportunities to drive future success. Our team of the world's best and brightest analysts, economists and futurists guides organizations through the information maze by providing a 360-degree view of industry intelligence to help identify new opportunities before their competitors to achieve transformational growth.

"Frost & Sullivan played a vital role in helping us to determine whether or not we should expand one of our businesses worldwide. Having become an extension of our team, they approached the assignment with enthusiasm, dedication, and professionalism. We were fortunate to have a Frost & Sullivan team on the ground in three continents to conduct the research. The fact base Frost & Sullivan helped build ultimately saved us millions in a failed market entry attempt into unattractive markets. I look forward to working with Frost & Sullivan again."

- Greif, a Manufacturer of Industrial Packaging

## From Ideation to Realization

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Frost & Sullivan's Personal Protective Equipment & Safety program helps organizations find the opportunities in this sea of change and implement strategies to support growth. Our experts and consultants continuously engage with manufacturers, distributors, and end users to provide actionable intelligence to organizations across the world.

We provide organizational leaders with the intelligence needed to capitalize on growth opportunities by leveraging a global perspective, technology expertise and in-depth coverage of all industries, paired with world-class support and service.

## Actionable Intelligence

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Market Size & Forecasts



Pricing, Unit Shipment & Forecasts



Competitive Landscape & Share



Value Chain & Business Models



Pipeline & Product Analysis



Market Trends - Drivers & Restraints



Emerging Geographic Markets



Key Industry Trends Coverage & Assessment of Trend Impact



Continuous Tracking of your Industry's Technology Trends



Analyst Interaction



Companies to Action



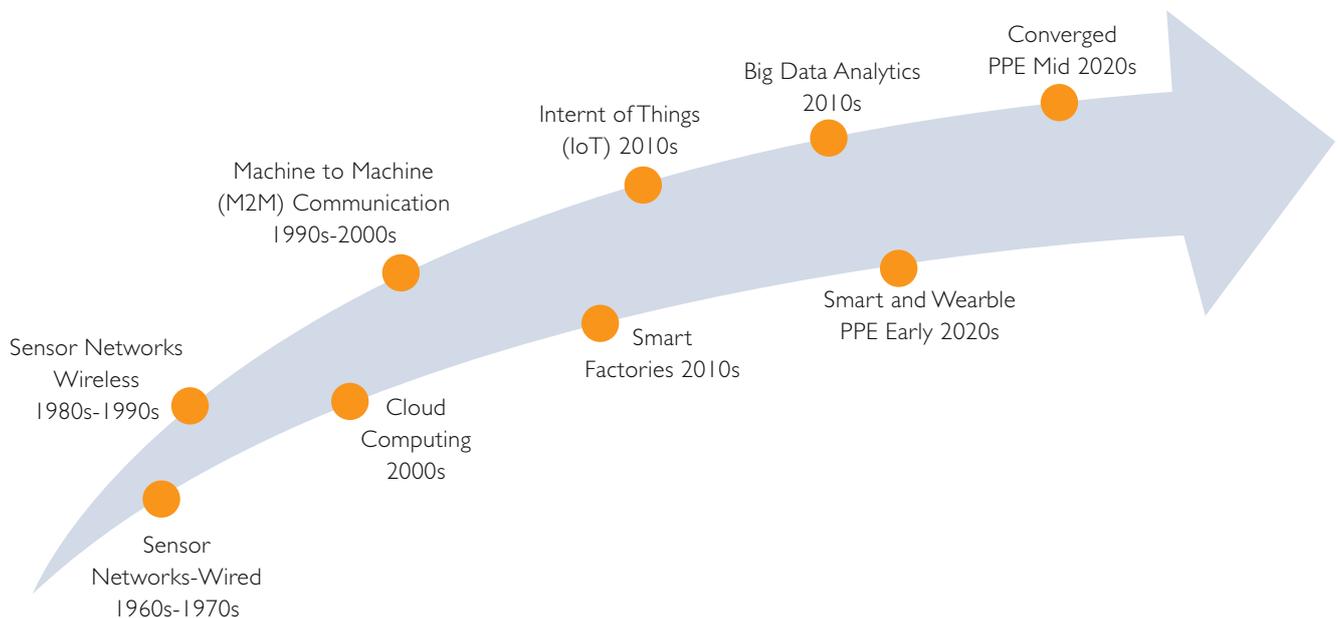
Interaction with Peers and Industry Leaders

## We Cover the Mega Trends Defining the Future

By understanding innovation and new business models, we identify and cover global Mega Trends that define the present and shape the future by their impact on businesses, economies, industries, societies and individual lives.



## Progression of Enabling Technologies & Future Trends



### ABOVE THE NECK PROTECTION



Covering the most basic protection used by workers in most industrial environments, above the neck protection covers head protection, eye and face protection, and hearing protection. As one of the mature markets within PPE, the market evolves through innovation.

### RESPIRATORY PROTECTION



Respirators protect workers from inhaling harmful substances or airborne contaminants in an environment with depleted oxygen levels. Increasing safety awareness across industries continues to drive better adoption of respirators.

### HAND PROTECTION



Hand protection is one of the most common PPE used in many workplaces and covers disposable and reusable gloves for the industrial and medical sectors. As one of the fastest growing markets in PPE, it holds substantial untapped potential in emerging economies due to low end-user compliance.

### PROTECTIVE CLOTHING



Different workplace hazards call for different types of protective clothing—hi-visibility, chemical, heat and flame, antistatic, weather or chainsaw protection to protect workers' bodies from the respective hazards. Multi-functional garments are changing the face of the protective clothing market as a "one-fits-all" solution.

### WORKWEAR



Unlike protective clothing, the purpose of workwear is for easy identification of a company's employees and to build the corporate image of the organization. The popularity of work clothing and uniforms is growing worldwide, and the market is firmly driven by advancements in fabric technologies. Polyester is gaining more penetration in the workwear market because it is the preferred choice in high-performance fabrics.

### FALL PROTECTION



Fall protection is a niche segment of the PPE market that comprises of equipment used by people working at height, either to prevent them from falling or to minimize the impact in the event of a fall. Fall protection is a hotspot for the PPE industry because it is a fast-growing market in emerging economies with increasing importance in developed markets.

### FOOT PROTECTION



Shoes and boots protect workers' feet from impact and puncture hazards. The market is continuously evolving toward better-quality products.

### GAS DETECTION



Safety gas detectors are used in a variety of workplaces, ranging from oil platforms to pharmaceutical laboratories. The market is trending toward service-oriented business models, with manufacturers turning to value-added services such as wireless communication and remote monitoring for a competitive edge.

## NEED ACTIONABLE INTELLIGENCE?

We Can Help.

Frost & Sullivan understands how to prepare companies in the face of an uncertain future. Our global team works with clients worldwide to help them navigate the many complexities facing their industries, allowing them to take advantage of current growth opportunities and positioning them for even more significant growth in the future.

Become a Member: A User Experience Unlike Any Other

Frost & Sullivan's member portal provides actionable intelligence through an intuitive platform to ensure customers gain answers to critical questions faster than ever before.





Schedule a dialogue with our team to discuss your strategic growth development

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