

**Market Research
Report
On
Sanitizer
Manufacturing Industry
in
India in 2024**



Rao's Business Marketing

1. INDUSTRY OVERVIEW

The sanitizers and disinfectants manufacturing industry in India has become a key segment in the broader hygiene and personal care market, with substantial growth witnessed in the post-pandemic era. While the surge in demand for these products was initially triggered by the COVID-19 pandemic, the hygiene practices adopted during this time have persisted, leading to sustained demand across various sectors. The need for **infection control**, **cleanliness**, and **health safety** continues to be a priority, with sanitizers and disinfectants becoming essential in both personal and commercial spaces.

By 2024, the sanitizers and disinfectants market in India has grown into a multi-billion-dollar industry, largely driven by government regulations, increased consumer awareness, and the institutional adoption of sanitation practices. The industry includes a wide variety of products, ranging from **hand sanitizers**, **surface disinfectants**, and **wipes** to **air sanitizers** and **industrial disinfectants**.

2. Market Size and Growth

- **Market Value in 2024:** The market for sanitizers and disinfectants is expected to be valued between **₹15,000 crore to ₹18,000 crore** in 2024, reflecting the continuing demand for these hygiene products across multiple sectors. This marks a growth rate of approximately **12-15% CAGR** (Compound Annual Growth Rate) from 2023 to 2024.
- **Growth Drivers:**
 - **Pandemic Legacy:** The pandemic-induced shift in hygiene practices has laid a long-term foundation for growth. Even after the pandemic, consumers continue to prioritize hygiene and cleanliness, contributing to a sustained demand for sanitizers and disinfectants.
 - **Government Policies:** The Indian government has introduced several **sanitation guidelines**, particularly for **healthcare facilities**, **public spaces**,

and **food-related businesses**, which mandate the use of disinfectants and sanitizers.

- **Rising Hygiene Awareness:** As awareness of **germ transmission** and **infection control** continues to grow, consumers and businesses are increasingly incorporating sanitizing products into their daily routines.
- **Technological Advancements:** Innovations in product formulations, such as **alcohol-free sanitizers**, **natural disinfectants**, and **antibacterial wipes**, are driving market expansion.

3. Industry Trends

1. Alcohol-Based Sanitizers:

- **Dominant Segment:** Alcohol-based hand sanitizers remain the most popular and effective sanitizing solution, particularly for on-the-go use. These products, which typically contain **60-70% alcohol**, are favored due to their high efficacy in killing germs.
- **Challenges with Alcohol-Based Products:** While alcohol-based sanitizers are effective, they can cause dryness and irritation on the skin. This has led to an increased demand for alcohol-free alternatives that are gentler on the skin.

2. Natural and Eco-Friendly Products:

- **Green Chemistry:** There is a growing demand for **eco-friendly** and **organic sanitizers and disinfectants**. Consumers are becoming more environmentally conscious and are seeking products that are **biodegradable**, **non-toxic**, and **chemical-free**. Natural ingredients such as **tea tree oil**, **aloevera**, and **lavender** are being incorporated into sanitizers to enhance their appeal to environmentally-conscious buyers.
- **Eco-Friendly Packaging:** Manufacturers are focusing on reducing plastic usage and are opting for **recyclable packaging** or **refillable containers** to cater to the growing eco-conscious consumer base.

3. Increased Use of Surface Disinfectants:

- **Surface Cleaning Demand:** Surface disinfectants, such as sprays and wipes, have become ubiquitous in commercial spaces, homes, and healthcare

facilities. These products are designed to sanitize frequently touched surfaces such as door handles, tables, and phones.

- **Convenience Products:** Disinfectant wipes and sprays are particularly popular for their convenience and ease of use. Multi-surface disinfectants that can be used across different areas are in demand for their versatility.

4. **Touchless and Automated Sanitization:**

- **Technological Integration:** The demand for **touchless sanitization** products, such as automatic hand sanitizer dispensers and automated surface disinfectant systems, has grown significantly, particularly in high-traffic areas such as airports, hospitals, offices, and schools.
- **Smart Hygiene Solutions:** The use of smart dispensers that release the right amount of product, ensuring minimal waste, is becoming a standard in public spaces and commercial establishments.

4. Market Segments

1. **By Product Type:**

- **Hand Sanitizers:** The largest segment, accounting for a significant share of the market. Hand sanitizers are available in **gel, liquid, and foam** forms. With rising awareness about the need for hand hygiene, especially in schools, hospitals, offices, and public spaces, the demand for hand sanitizers continues to increase.
- **Surface Disinfectants:** These include sprays, wipes, and concentrated cleaners that are used to disinfect surfaces. With more focus on cleaning **high-touch areas**, surface disinfectants are in high demand across industries such as **healthcare, hospitality, food services, and retail**.
- **Wipes:** Disinfectant wipes are growing in popularity for their ease of use and portability. They are ideal for cleaning small surfaces or carrying on the go.
- **Air Disinfectants:** Products like air purifiers, disinfectant sprays, and diffusers are becoming popular for maintaining hygiene in enclosed spaces, particularly in **hospitals, schools, and offices**.

2. By End-User Industry:

- **Healthcare:** Hospitals, clinics, and nursing homes are the largest consumers of sanitizers and disinfectants, with high volumes required to ensure cleanliness and prevent cross-contamination. Products in this sector include **hospital-grade disinfectants** and **sterilizing solutions**.
- **Residential Use:** The increasing use of sanitizers and disinfectants in homes, especially in high-risk areas like kitchens and bathrooms, is a growing trend. Consumers are becoming more cautious about hygiene, particularly with the continued awareness of viral infections.
- **Commercial and Institutional Use:** The **hospitality** industry (hotels, restaurants), **education** sector (schools, colleges), and **offices** have become regular buyers of disinfectants and sanitizers. Institutional demand is high for large-scale sanitization solutions, including **bulk disinfectants** and **disinfectant dispensers**.
- **Food & Beverage:** The food industry uses disinfectants to sanitize food preparation surfaces, utensils, and equipment to maintain food safety and hygiene standards.

3. By Distribution Channel:

- **Retail (Offline):** Supermarkets, grocery stores, and pharmacies are the primary offline distribution channels for sanitizers and disinfectants. The growing retail infrastructure in India ensures easy access to hygiene products for consumers.
- **E-commerce:** Online platforms such as Amazon, Flipkart, and local e-commerce websites are witnessing significant growth in sanitizer and disinfectant sales. E-commerce provides the convenience of home delivery and often offers discounts, further driving demand.
- **B2B (Business-to-Business):** Bulk supply of disinfectants to commercial, institutional, and industrial clients is a key distribution channel. B2B suppliers offer products like industrial disinfectants, cleaning agents, and sanitizing machines.

5. Competitive Landscape

- **Key Players:**

- **Hindustan Unilever (Lifebuoy, Domex):** A market leader with a wide portfolio of sanitizers, disinfectants, and cleaning products. Lifebuoy and Domex are trusted brands across both personal hygiene and surface cleaning segments.
- **ITC Limited (Savlon):** A strong player in the hand sanitizer market with its Savlon brand, offering both alcohol-based and alcohol-free products.
- **Godrej Consumer Products (Protekt):** Known for its wide range of sanitizing products for both personal and surface hygiene, including **hand sanitizers** and **surface cleaners**.
- **Dabur India (Dabur Sanitize):** Dabur is making inroads into the sanitization market with its range of **alcohol-based sanitizers** and **disinfectant sprays**, leveraging its strong presence in personal care.
- **Reckitt Benckiser (Dettol):** One of the most recognized brands in India, Dettol offers a variety of sanitizers, disinfectants, and antiseptic solutions for homes, healthcare, and commercial spaces.

- **Market Dynamics:**

- **Domestic Manufacturers:** The rise of local brands offering affordable and quality sanitizers has made the market highly competitive. Indian manufacturers are innovating in formulations and packaging to cater to the growing demand.
- **Global Players:** International companies continue to dominate the high-end segment of the market, especially with their premium products and strong brand recognition.

6. Opportunities

1. Sustained Hygiene Demand:

- Hygiene awareness will remain a key growth driver. The demand for sanitizers and disinfectants in both commercial and residential sectors will continue as businesses, schools, and public spaces continue to emphasize cleanliness.

2. Rural Market Expansion:

- Rural markets present a significant growth opportunity. As rural populations become more aware of hygiene and infection control, manufacturers can expand their product lines to cater to this demographic with affordable and effective sanitizers and disinfectants.

3. Innovation in Eco-Friendly Products:

- There is growing demand for natural and biodegradable sanitizers. Manufacturers that offer eco-friendly solutions can tap into this expanding segment by creating products that cater to the environmentally conscious consumer.

4. Institutional Demand:

- With the ongoing focus on **workplace hygiene, schools, hotels, and restaurants**, businesses will continue to seek large-scale sanitation solutions, which presents an opportunity for manufacturers to offer bulk products and **institutional-sized packaging**.

7. Challenges

1. Regulatory Compliance:

- Companies must adhere to stringent **regulatory standards** set by the **Bureau of Indian Standards (BIS)** and the **Central Drugs Standard Control Organization (CDSCO)**. This adds complexity to product development and manufacturing processes.

2. Supply Chain and Raw Material Dependency:

- Raw materials like **ethanol**, **isopropyl alcohol**, and **essential oils** are essential for production, and their supply chain is often subject to disruptions. Any price fluctuation or shortage can impact production costs.

3. Intense Competition:

- The rise of **local players** offering budget-friendly options and the presence of established global brands makes the market highly competitive. Manufacturers must differentiate themselves through quality, branding, and innovation.

8. Future Outlook

The **sanitizers and disinfectants manufacturing industry** in India will continue to thrive in 2024 and beyond, driven by increased hygiene awareness, government initiatives, and the institutionalization of sanitation practices. With the evolving demand for eco-friendly, natural, and technologically advanced products, companies in this sector will need to stay agile and innovative to maintain a competitive edge.

The industry's long-term growth potential remains robust, as hygiene becomes an integral part of daily life for individuals and businesses alike.

This detailed report offers insights into the opportunities, trends, challenges, and market dynamics of the **sanitizers and disinfectants manufacturing industry** in India. If you need further details or specific insights, feel free to ask!

