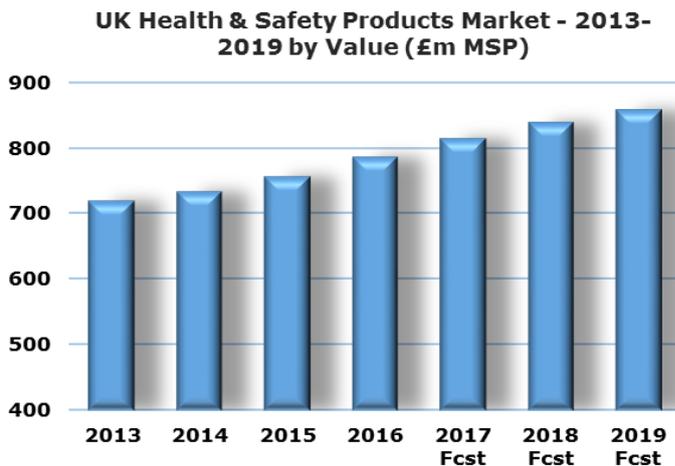




PRESS RELEASE

UK Health & Safety Products Market forecast to grow by 4% in 2017

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The UK health and safety products market, in non-domestic applications, is estimated to have grown by 4% in 2016 in value terms, according to a new report by AMA Research. The market as a whole has experienced positive growth since 2014, driven by significant improvements in construction output - particularly in terms of housebuilding, a stronger manufacturing sector, ongoing changes or updates to legislation and higher levels of awareness and compliance.

Manufacturing is still relatively volatile; however, output rose to a 30-month high in December 2016, in part the result of a weaker pound stimulating exports. Stronger demand for UK products from the local as well as US, European, Chinese and other global markets has also benefitted business activity and employment levels. The maturity of the health and safety products market, and heavy reliance on construction and manufacturing activity and output, also means that it is reliant on public and private sector confidence, levels of spending and investment, and employment growth.

Simplification of health and safety legislation has led to a substantial fall in the number of health and safety inspections carried out in Britain, and also to a decline in the stock of health and safety legislation. At the same time, there has been a progressive rise in the value of fines levied – particularly since the introduction of new sentencing guidelines for health and safety offences, which came into force on 1 February 2016, and this is leading to higher levels of compliance generally. Also boosting compliance levels is the focus on higher levels of comfort and improved wearability in new product development and innovation.

Personal protective equipment (PPE) dominates the health and safety products market, and accounted for an estimated value share of around 42% in 2016. The sector covers a very wide range of products including head, face, eye, hearing and respiratory products, as well as clothing, gloves, safety footwear and fall protection equipment. Hygiene products and first aid products also make up significant segments of the market.

The hygiene product sector covers both skin care and washroom products such as tissues, towels and wipes, while the first aid product sector is dominated by general purpose first aid kits. For consumables, users tend to opt for lower cost products that meet the minimum required standard, and there is also a strong presence of unbranded products in these sectors, something which has constrained market growth to some extent. There has, however, been growth in special purpose kits within the market due to the introduction of a British Standard in 2014 focusing on vehicle kits.

Distribution of health and safety products is influenced by a range of factors that includes the fragmentation of the market in terms of both products and end user groups, the trend for single source procurement, and the growth of the internet as a medium for both sales and price/product comparison. Distribution trends also vary between product groups, with technical, specialist items sourced from specialist suppliers, and consumables often purchased from general/industrial distributors or office suppliers. Competition will remain a factor in the market, a result of the growing number of companies supplying health and safety products, particularly at the commodity end of the market.

"In value terms, growth is likely to remain steady in 2017, at around 4%, underpinned by the relative strength in the construction and manufacturing sectors, as well as higher levels of awareness and compliance with health and safety legislation" said Fiona Watts of AMA Research. "However, given the uncertainties in the wider economy and the potential for a slowing of both economic growth and the labour market, we expect the rate of growth to decline slightly between 2018 and 2021."

The impact of Brexit and, more importantly, the discussions and speculation surrounding are highly likely to impact business sentiment and levels of investment. Consumer spending is also likely to slow as a result of rising inflation. However, short term impacts are always unpredictable and have the potential to impact the market significantly in any given year. These include outbreaks of highly infectious diseases such as influenza, norovirus, meningitis and others; hospital acquired infections and epidemics, and the wider threat of antibiotic resistance.

The **'Health & Safety Products Market Report – UK 2017-2021 Analysis'** report is published by AMA Research, a leading provider of market research and consultancy services with over 25 years' experience within the construction and home improvement markets. The report is available now and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.

Editors Note:

If you would like to receive more information on the report, or would like to speak to the author, then please contact Anna Eriksson on 01242 235724.

Please include our web address and telephone number on any review printed, and it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

AMA Research Ltd
Montpellier House
Montpellier Drive
Cheltenham
Gloucestershire GL50 1TY
Tel: +44 (0)1242 235724
Fax: +44 (0)1242 262948
E-mail: annaeriksson@amaresearch.co.uk
Website: www.amaresearch.co.uk