

PPE – Market Survey 2006

The German Market for Personal Protective Equipment

Basic Survey of GfK Marktforschung AG and
macrom Marketingresearch & Consult

Structure

- Market structure and market systematics
- Market development in the past
- Market environment and general conditions
- Market volume and residual potentials
- Future market development and trends
- Imports
- Distribution
- Target groups
- Main Players



- In 2005 the **IVPS**, the association of the major personal protection equipment manufacturers active in Germany has assigned GfK to carry out a survey which delivers reliable information about the structures of the German market for the first time. Former surveys were judged as not valid by market participants.
- To guarantee the maximum benefit of the project all requirements and definitions were developed by the members of the IVPS and thus by practitioners of the market.
- In the phase of implementation the project was supported not only by the network of IVPS members but also by numerous further market participants disposed to endorse this ambitious research project.
- By presenting the result of the survey all parties concerned were assured completely that a detailed and reliable illustration of the market was now achieved.
- This survey was available only for the financing members. In fact, other interested companies had the opportunity to receive information about the fundamental structures of the market, but only as a strongly shortened version.
- By help of the projected update in 2007 it will be possible for every interested company to acquire the complete survey and to inform themselves about the German market for personal protection equipment and its development in a fact based way.



Covered markets and product groups

- **Head protection:** construction helmets, industrial helmets (thermoplast), industrial helmets (duroplast), protective caps
- **Eye protection:** safety spectacles, cover spectacles, prescription safety spectacles, full vision goggles, laser protection, visors
- **Hearing protection:** single-use and multi-use earplugs, noise blocking and sound management earmuffs, custom made hearing protection
- **Respiratory protection:** disposable masks, filters, half and full face masks, escape equipment, trolleys, breathing apparatus, mobile breathing air supply, air cylinders, long term protection, air line devices
- **Protective gloves:** leather, textile uncoated, coated gloves on stockinette, coated knitted gloves, chemical protection, single use, heat protection, fire brigade gloves, tension protection, cold protection, vibration protection
- **Skin protection:** skin cleaning, skin protection and skin care
- **Protective clothing:** welding protection, flame protection (impregnation and fibre), heat protection (aluminized), single use protection, light, middle and heavy chemical protection, cutting protection, machine protection, weather protection, warning protection, cold protection
- **Fall protection:** vertical climbing protection, harnesses and ropes, horizontal security systems, fall arresters, rescue devices,
- **Protective Footwear:** S1, S3, S2, S1P, SB-basic shoe





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