

The New Hygiene and PPE Buying Model



What influences supplier selection, trust and loyalty
in the professional hygiene industry

Research among 1,320 professionals working across health, hygiene and facilities management

Published and interpreted by Mulberry
SELECTION • TRUST • LOYALTY

EXECUTIVE PERSPECTIVE

The buying decision has changed

Price and performance still matter. But buyers now expect greater proof, greater transparency and a more responsive supplier relationship.

MULBERRY PERSPECTIVE

The new hygiene buying model is not a choice between value, performance and responsibility. Buyers increasingly expect all three—and want credible evidence that suppliers can deliver them consistently.

Professional hygiene purchasing has always been grounded in practical outcomes. Products must work. Equipment must remain available. Services must be dependable. Budgets must be defended. The research confirms that these fundamentals remain decisive—but it also shows that the definition of a credible supplier is expanding.

Buyers are assessing not only what a supplier promises, but whether those promises can be evidenced. Sustainability is increasingly expected, yet it rarely displaces value or reliability. Innovation attracts interest when it solves a recognisable operational problem. Loyalty is built through consistent delivery, then protected through communication, transparency and responsiveness.

A further influence is emerging before the conventional buying process begins. AI platforms are increasingly used to identify, explain and compare suppliers. This means brands must now be visible and credible in machine-generated answers as well as in search results, trade media and sales conversations.

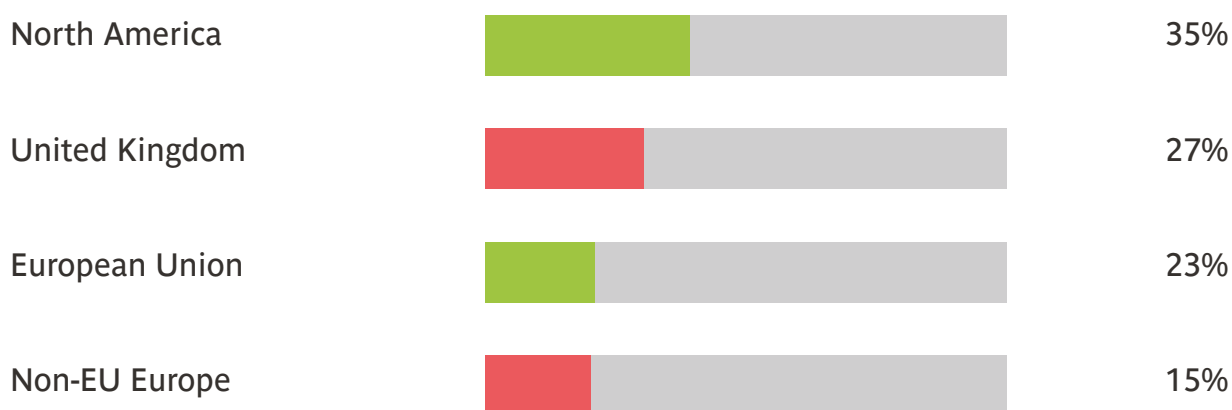
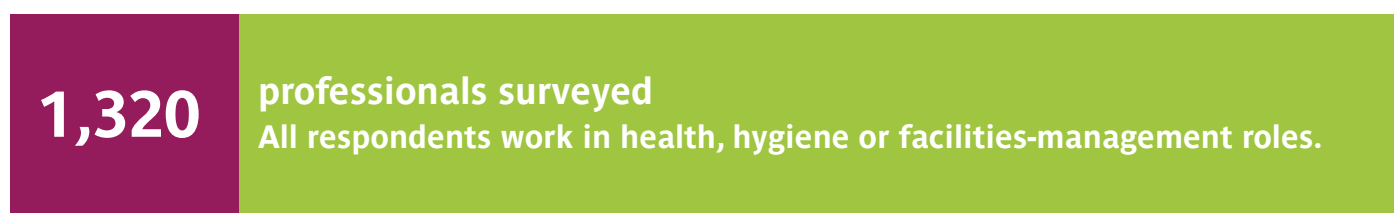
The commercial opportunity is clear: the brands most likely to grow are those that make value easy to understand, claims easy to verify and relationships easy to maintain.

This inaugural report establishes a benchmark. Future editions will track how priorities, expectations and buying behaviours change over time.

RESEARCH AT A GLANCE

A substantial international view of hygiene buying

The study brings together perspectives from health, hygiene and facilities-management professionals in four major geographic groupings.



A commercially relevant audience

Nearly three-quarters of respondents either make final supplier decisions or influence them. The sample also spans organisations of different sizes, from smaller businesses to multinational employers.



Method note

Percentages are rounded. Some questions allowed multiple selections, so totals may exceed 100%. Open-text findings use smaller response bases: Q19, n=89; Q20, n=99.

THE FRAMEWORK

The New Hygiene Buying Model

Three stages shape the commercial relationship. Two forces—responsibility and AI-enabled discovery—now influence how buyers move through them.

01 **SELECTION**
Can this supplier deliver the right outcome at the right value?
Value • Reliability • Service • Responsiveness • Useful innovation

02 **TRUST**
Can I believe—and defend—the claims being made?
Certification • Evidence • Reporting • Case studies • Transparency

03 **LOYALTY**
Does the relationship continue to deliver after appointment?
Consistency • Communication • Innovation • Responsiveness • Commercial value

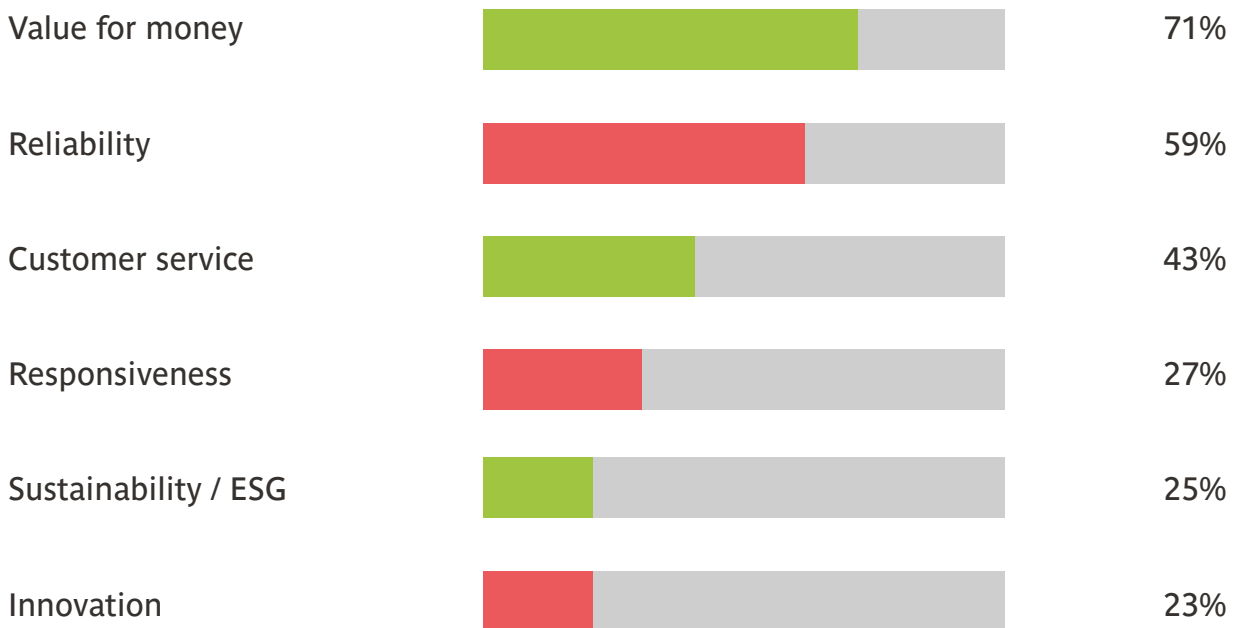
TWO FORCES RESHAPING THE MODEL

Sustainability changes the proof buyers expect. AI changes how potential suppliers are discovered and understood.

STAGE ONE • SELECTION

Commercial fundamentals still dominate

The shortlist is built around practical outcomes. Buyers want value, reliability and service before they reward broader brand claims.



What the ranking really means

The result should not be reduced to “price wins.” Value for money is a broader judgement about what the buyer receives over the life of the relationship. In hygiene, that may include labour productivity, continuity of supply, equipment uptime, training, reduced consumption, simpler compliance and the cost of service failure.

Reliability ranks second because hygiene is operationally unforgiving. A late delivery, unavailable consumable, failed machine or slow response can disrupt cleaning schedules, undermine compliance and create reputational risk.

Selection begins with a commercial question: will this supplier make the operation work better—not simply make the invoice smaller?

HEADLINE INSIGHT 01

Hygiene buyers are looking beyond price to the cost of performance

71%

place value for money among their top three priorities
But the qualitative findings show that value is judged
alongside delivery, reliability, responsiveness and
transparency.

For suppliers, the challenge is to make the complete value story visible. A lower unit price is easy to compare; avoided downtime, reduced rework, faster training and longer asset life are harder to see unless they are translated into evidence buyers can use.

Reframe value around outcomes

- Move from unit-price arguments to total cost of ownership and operational value.
- Quantify the consequences of reliability: uptime, continuity, labour hours and avoided disruption.
- Show where product, service and support combine to reduce hidden cost.
- Equip sales teams with calculators, benchmarks and sector-specific proof—not generic benefit lists.

“Faster supplies at lower rates and improved reliability.”
— Survey respondent

Mulberry perspective

The strongest proposition will not be “we are cheaper.” It will be “we create more dependable outcomes for every pound spent.”

STAGE TWO • TRUST

Buyers need claims they can defend

A supplier's promise must survive scrutiny from procurement, operations, sustainability teams and senior leadership.

58%

trust their provider's ESG and sustainability claims

A further 31% are neutral—leaving a substantial group that is not fully convinced.

Trust in professional hygiene has several layers. Buyers need confidence that products perform as claimed, that compliance information is current, that environmental statements are meaningful and that service promises will be honoured after appointment.

This is why neutral responses matter. Neutrality is not rejection, but it signals an evidence gap. A brand may be believed at a general level without giving buyers enough confidence to repeat or defend its claims internally.

From assertion to assurance

- State the claim clearly and avoid vague environmental language.
- Show the underlying measure, methodology and relevant boundary.
- Add independent certification, testing or verification where possible.
- Demonstrate the outcome through a customer case or benchmark.
- Make supporting evidence easy to locate, understand and share.

In a complex buying group, trust is created when every stakeholder can find the proof they need.

HEADLINE INSIGHT 02

Sustainability has become an expectation—but value still determines the decision

74%

say supplier sustainability strategy is important

Yet only 25% put sustainability or ESG alignment among their top three selection priorities.

This apparent contradiction is one of the study's most important findings. Sustainability has not become irrelevant; it has become part of the expected standard. But buyers still need suppliers to satisfy the operational and commercial requirements that determine whether a contract succeeds.

The opportunity is integration

Environmental benefits become more persuasive when connected to operating outcomes: lower energy or water use, reduced chemical consumption, less packaging, longer product life, safer processes, fewer deliveries or simpler reporting. Sustainability should not sit in a separate corporate chapter; it should strengthen the value proposition.

“I expect clear ESG commitments: transparency, carbon reduction goals, ethical sourcing, and real action—not just glossy reports.”

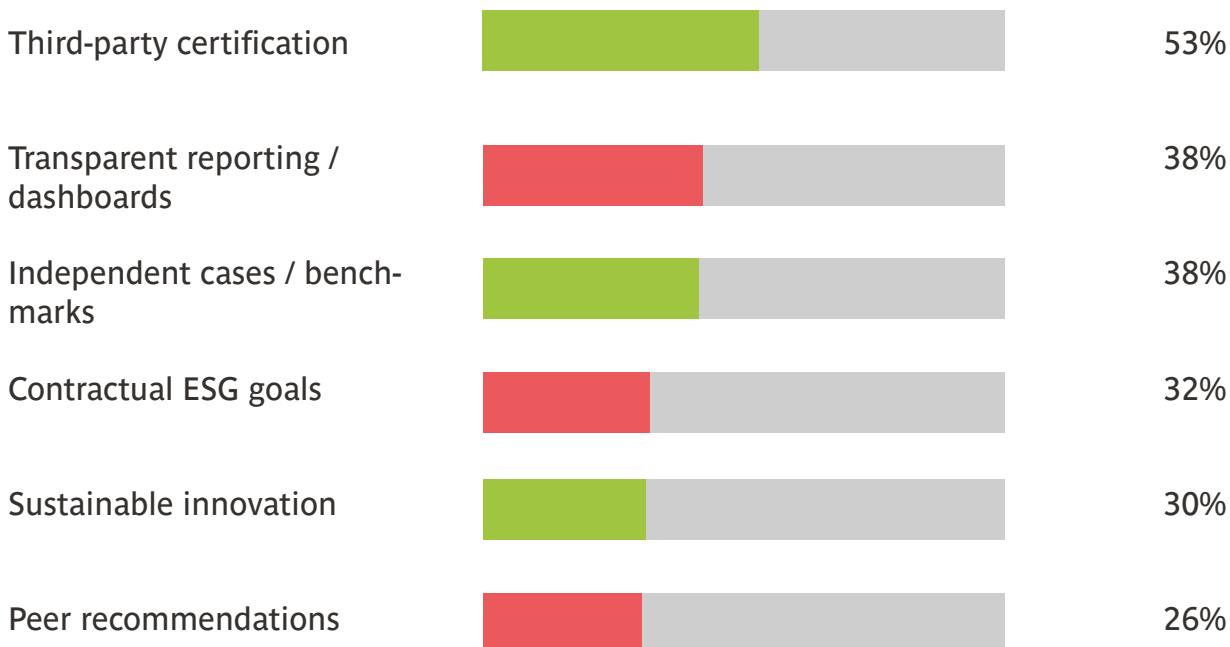
— Survey respondent

Mulberry perspective

Stop treating sustainability as a parallel story. Make it part of the reason the product, service or system performs better commercially.

HEADLINE INSIGHT 03

The age of the unsupported sustainability claim is ending



Buyers are telling suppliers exactly what makes a responsibility claim credible. Certification leads, but no single proof point is sufficient in every situation. Strong brands build a connected evidence system that moves from independent validation to transparent performance and real-world application.

Build a proof architecture

- Credentials: relevant certification, testing, standards and audit results.
- Measurement: clear baselines, metrics, boundaries and progress reporting.
- Application: independent cases showing what changed for a customer.
- Commitment: specific goals embedded in contracts or service agreements.
- Accessibility: evidence structured so buyers, sales teams and AI platforms can retrieve it.

“We expect evidence of progress and tangible, realistic goals.”
— Survey respondent

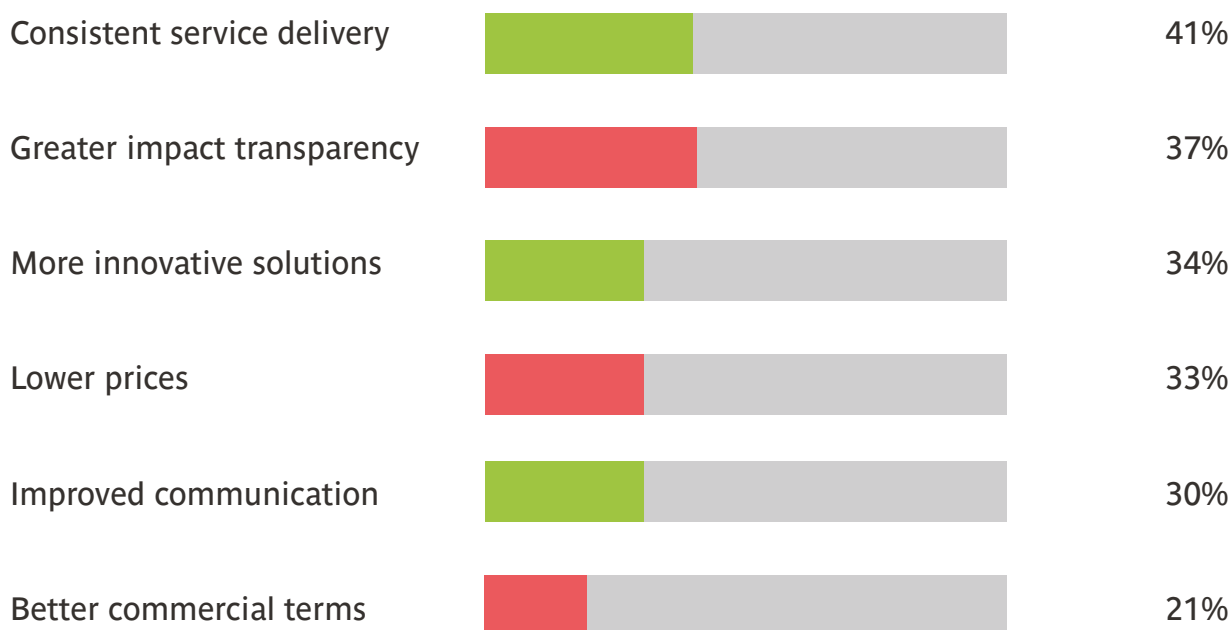
Mulberry perspective

The communications task is no longer to make the claim louder. It is to make the evidence easier to inspect.

STAGE THREE • LOYALTY

The relationship is judged after the sale

Retention depends on whether the supplier continues to deliver, communicate and improve—not simply whether the original contract was competitive.



Consistency is the leading loyalty driver, but the results reveal a cluster rather than a single answer. Buyers want reliable delivery, visibility of performance, relevant innovation and competitive value. The relationship must remain active and demonstrably useful.

Loyalty is cumulative

A supplier may fulfil its contractual obligations and still weaken loyalty through slow responses, missing information or a lack of proactive advice. Conversely, good communication can make operational performance more visible and help customers recognise value that might otherwise go unnoticed.

Winning the contract establishes expectation. Keeping the contract requires the supplier to make delivery, improvement and value visible.

HEADLINE INSIGHT 04

In hygiene procurement, silence can damage loyalty as quickly as service failure

The open responses make communication one of the clearest areas of unmet need. Buyers repeatedly ask suppliers to communicate more clearly, respond more quickly, provide better updates and make certification or sustainability information easier to obtain.

“Provide certification when the item is delivered—not after we have had to chase for it repeatedly.”
— Survey respondent

What buyers want suppliers to improve

COMMUNICATION	Clearer updates, quicker answers and more useful reporting.
DELIVERY	Faster, on-time and dependable supply with fewer damaged products.
TRANSPARENCY	Better visibility of pricing, audit findings, ESG progress and supply chains.
VALUE	Competitive pricing combined with evidence of operational benefit.
SUPPORT	More responsive service and greater understanding of changing customer needs.

Mulberry perspective

Treat communication as part of service delivery—not as an activity that happens around it.

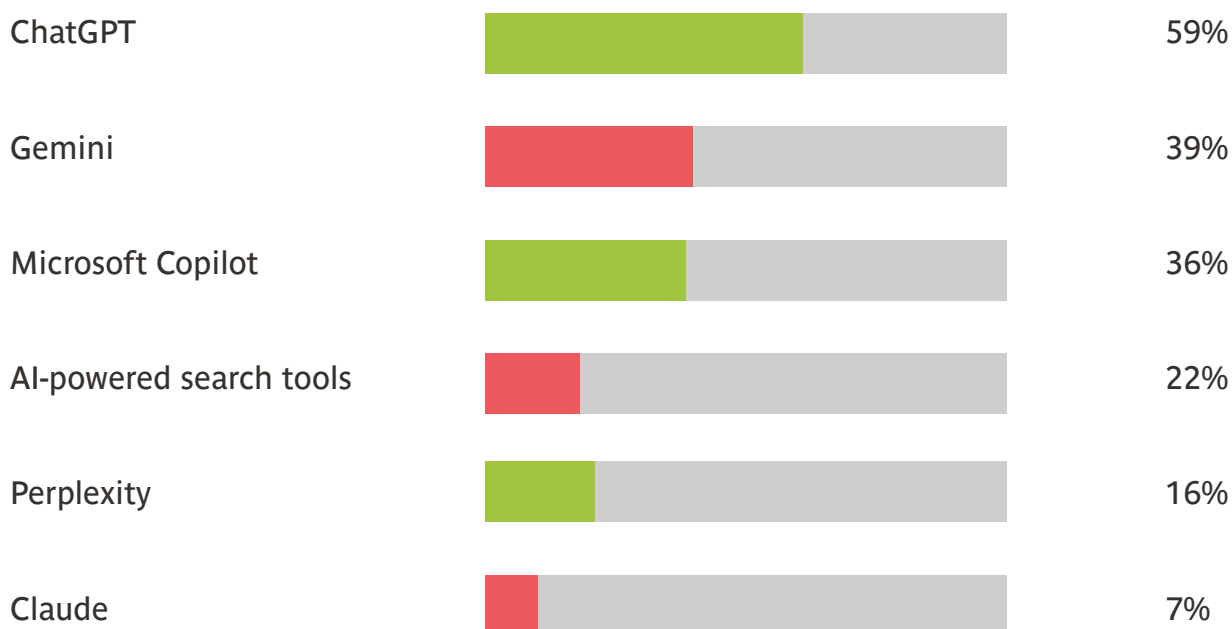
A NEW INFLUENCE

The shortlist is no longer shaped by search engines alone

AI platforms increasingly sit between a buyer's question and a supplier's proposition.

78%

use at least one listed AI-powered tool when researching suppliers or partners
Only 22% selected "none."



This does not mean AI has replaced conventional search, referrals, distributors, trade media or sales teams. It means another influential layer has been added to supplier discovery. A buyer may now ask an AI platform to explain a category, identify credible suppliers, compare propositions or summarise sustainability evidence before visiting a brand's website.

If an AI platform cannot understand a brand's expertise, evidence and differentiation, the brand risks being absent before the formal shortlist begins.

HEADLINE INSIGHT 05

AI visibility will depend on authority—not content volume

39%

believe AI-generated content risks diminishing brand authenticity
A further 35% are undecided, showing that the issue remains unresolved.

The answer is not to flood the market with generic AI-produced copy. As content becomes easier to create, original expertise becomes more valuable. Brands need material that demonstrates first-hand knowledge, contains proprietary evidence, answers genuine buyer questions and is structured clearly enough for both people and machines to interpret.

Five foundations for AI-era authority

- A sharply defined proposition that distinguishes the brand from competitors.
- Substantive answers to the commercial and technical questions buyers actually ask.
- Structured product, certification, application and sustainability information.
- Independent evidence, named expertise, credible case studies and original research.
- Consistency across websites, distributor materials, trade coverage and external sources.

The research itself can become part of this authority. Used well, The New Hygiene Buying Model gives its publisher proprietary language, original evidence and a relevant point of view that other sources—and AI platforms—can reference.

Mulberry perspective

Optimise for usefulness and credibility first. AI visibility should be the consequence of authority, not a substitute for it.

MULBERRY RECOMMENDATIONS

Six priorities for hygiene brands

The findings point to practical changes across proposition, content, evidence, sales enablement and customer experience.

01 **Redefine value**
Connect price to productivity, uptime, consumption, risk and lifetime cost.

02 **Make reliability visible**
Quantify delivery performance, service response, availability and continuity.

03 **Integrate sustainability**
Link environmental progress directly to customer and operational outcomes.

04 **Build the evidence system**
Combine certification, measurement, reporting, benchmarks and customer proof.

05 **Design communication into service**
Provide proactive updates, accessible documentation and clear performance reporting.

06 **Strengthen AI discoverability**
Create authoritative, structured content around real buyer questions and category expertise.

The strongest brands will make three things easy for buyers: understanding the value, verifying the promise and experiencing the difference.

CONCLUSION

The supplier relationship is becoming more demanding — and more valuable

The new model rewards brands that combine operational performance with credible proof and an active customer relationship.

Value and reliability remain the foundations of hygiene purchasing. But foundations are no longer the whole building. Buyers increasingly expect responsible practices, meaningful innovation, accessible evidence and consistent communication. They are also beginning to use AI platforms to shape their understanding before conventional supplier engagement starts.

This creates a significant opportunity. Hygiene brands that translate technical strengths into commercial outcomes, support claims with independent evidence and remain visible throughout the relationship can compete on more than price. They can become easier to select, safer to trust and harder to replace.

TRACKING THE MARKET

This is the first report in a continuing Mulberry research series. By repeating and developing the study, we will track how the factors shaping selection, trust and loyalty evolve—and identify the emerging implications for hygiene brands.

Selection is won through relevant value. Trust is earned through evidence. Loyalty is sustained through consistent delivery and communication.

About the research

The New Hygiene Buying Model is based on research conducted among 1,320 professionals working in health, hygiene and facilities-management roles. Respondents represented organisations across the UK, European Union, non-EU Europe and North America and included business owners, senior leaders, procurement professionals, sales and marketing leaders, and sustainability specialists.

Participants were offered the opportunity to enter a prize draw to win a £200 Amazon voucher. Percentages have been rounded. Questions permitting multiple selections may total more than 100%. Open-text findings are used directionally and have smaller bases: Q19, n=89; Q20, n=99. Quotations have been lightly edited for spelling and readability without changing their meaning.

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