



## FOODSERVICE CLEANING PRODUCTS: U.S. MARKET ANALYSIS AND OPPORTUNITIES

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A comprehensive analysis of the foodservice cleaning products market, this study focuses on key changes, challenges, and business opportunities. It also assesses professional cleaning products used in back-of-house cleaning and includes an assessment of warewash machinery trends, end-user perceptions, attitudes and usage, and dispensing methods.

### Scope



- Complete analysis of the market by product, end use, supplier, and distribution channel
- Outlook for key product segments, including automatic and manual warewashes, surface cleaners, hand care, and other cleaning products used in commercial kitchens
- Structured research with over 700 end users to understand critical buying factors, usage, product form preferences, and anticipated spending changes
- Analysis of major suppliers, multiple distribution channels including direct, distributors, retail, and online, and market dynamics
- Assessment of dilution and dispensing trends
- Forecasts through 2028

### Regional Coverage



United States

### Features and Timing



Base Year: 2024

To be Published: Q4 2024

Forecasts to 2028

10th Edition

**FEATURING AN INTERACTIVE ONLINE  
DATABASE THAT OFFERS...**

...the ability to export sales data for all product classes, categories, product forms, suppliers, and end-use segments

# TABLE OF CONTENTS

## Supplier Profiles

The 16 leading suppliers of foodservice cleaning products, shown in Table 1, will be profiled. Profiles include a description of the company, sales by end-use segment and product class and category, a description of product portfolio, and news of recent developments.

## Product Category Profiles

General information on the major product categories are listed in Table 3. The following information is provided:

- Applications
- Dollar sales
- Sales by end-use segment
- Suppliers
- Most commonly used product forms
- Forecast sales
- Assessment



## End-User Response Data

A summary of survey results for the overall market and each end-use segment includes:

- Survey goals and specifications
- Spending
- Purchasing
- Product usage
- Key trends
- Size of facilities

TABLE 1. SUPPLIERS PROFILED

|                              |                               |
|------------------------------|-------------------------------|
| 3M                           | Noble Chemical                |
| Auto-Chlor                   | Procter & Gamble Professional |
| Clorox Professional Products | Reckitt Professional          |
| Colgate-Palmolive            | SC Johnson                    |
| Diversey                     | Spartan Chemical              |
| Ecolab                       | Spurrier Chemical Company     |
| GOJO                         | Sunburst                      |
| Henkel                       | Zep                           |

# TABLE OF CONTENTS

## Introduction

- Scope
- Geographic regions
- Sources and methods
- Rounding and assumptions
- Limitations

## Executive Summary

- Situation analysis
- Key trends
- Market size and segmentation
- Regulatory developments
- Trends and opportunities
- Competitive landscape
- Distribution channels
- Online buying
- Private label
- Warewash machinery trends
- Critical buying factors
- Outlook and appraisal

## End-Use Segment Profiles

Pertinent information and insightful analysis for each of the 12 major end-use segments are listed in Table 2. The following information is provided:

- Introduction
- Key market trends
- Market size and growth
- Product usage
- Low- and high-temperature warewash programs
- Distribution channels
- Critical buying factors
- Structure of the industry
- Outlook

TABLE 2. END-USE SEGMENTS PROFILED

|                           |  |
|---------------------------|--|
| Colleges and universities | Lodging establishments                       |
| Fast-casual restaurants   | Nursing homes and assisted living facilities |
| Fast food restaurants     | Recreational facilities-b                    |
| Full-service restaurants  | Retail hosts                                 |
| Hospitals                 | Schools                                      |
| Industry-a                | Other end users-c                            |

a- Includes government and industrial facilities and office buildings.  
b- Includes health clubs and fitness facilities, amusement parks, country and golf clubs, bowling alleys, movie theaters, museums, sporting arenas, concert halls, and zoos.  
c- Includes bars, pubs, craft breweries, wineries, airports, and bus and train stations

# TABLE OF CONTENTS

| TABLE 3. PRODUCT CLASSES AND CATEGORIES PROFILED  |  |
|---|--|
| <b>AUTOMATED WAREWASHES</b>   | <b>SURFACE CLEANERS</b>                          |
| Machine dishwashing detergents  | Degreasers                                       |
| Dish machine sanitizers   | Disinfectants and sanitizers (including bleach)  |
| Machine delimers  | Floor cleaners                                   |
| Rinsing and drying aids   | General-purpose cleaners                         |
| <b>MANUAL WAREWASHES</b>  | Glass cleaners                                   |
| Manual dishwashing detergents   | Oven and griddle cleaners                        |
| Manual dish sanitizers  | <b>SPECIALTY CLEANERS</b>                        |
| Presoaks  | Drain cleaners                                   |
| <b>HAND CARE</b>  | Lime scale removers (used outside dish machines) |
| Hand soaps  | Scouring cleansers                               |
| Hand sanitizers   | Stainless steel cleaners                         |
| <b>AIR FRESHENERS AND ODOR ELIMINATORS</b>  | All other*                                       |
| *Includes silver polish, furniture polish, brass polish, mildew removers, and other miscellaneous kitchen cleaning products |  |

# SUBSCRIBER BENEFITS

This study serves as an excellent resource for manufacturers and formulators of foodservice cleaning products. Specifically, it assists subscribers by providing:



A highly reliable, comprehensive assessment of the market based on over 700 structured surveys of end-use decision makers and in-depth interviews with suppliers and distributors



Information on key trends impacting the industry in product usage patterns, product form preferences, and purchase channels



An online, interactive database with dollar sales, forecasts, unit sales, sales by supplier, product class and category, and end-use segments that can be exported to Excel for further analysis

## Methodology



Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

## New and Improved Forecasts



Kline's new enhanced forecasting capabilities combines the power of advanced data science techniques and industry expertise to predict future market metrics. We analyze economic, demographic, social media, and consumer trend indicators to identify the factors driving growth. Our algorithms refine predications, and our automated processes provide the latest data for informed decision-making.

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## KLINE CREDENTIALS

Kline, an advisory consultancy and market research firm, combines industry expertise and technology to provide highly predictive and actionable data, insights, and advice. Known as "The Industry Experts," we deliver top-notch services in lubricants and petroleum specialties, professional beauty, and specialty chemicals. This focus gives us a competitive advantage and global leadership in these areas. While we also serve adjacent industries, our specialization sets us apart as the leading experts in our chosen fields.



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