

Foodservice Cleaning Products:

U.S. Market Analysis and Opportunities

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Base Year: 2020
Forecasts to 2025

9th edition

Regional Coverage:

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, and the impact of COVID-19 on the market.

- United States

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 nearly 800 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
- › Full analysis of the impact of COVID-19 on the industry and resultant changes in operations, cleaning, spending, and usage
- › Forecasts through 2025

**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

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Introduction

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

Executive Summary

- Situation analysis
- Key trends
- Impact of COVID-19
- 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 listed in Table 1. The following information is provided:

- Introduction
- Key market trends
- Market size and growth
- Impact of COVID-19
- Product usage
- Low- and high-temperature warewash programs
- Distribution channels
- Critical buying factors
- Structure of the industry
- Outlook

Table 1. 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

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Supplier Profiles

The 16 leading suppliers of foodservice cleaning products, shown in Table 2, will be profiled. Profiles include a description of company, sales by end-use segment and product class and category, 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
- Product forms most commonly used
- 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
- Impact of COVID-19
- Spending
- Purchasing
- Product usage
- Key trends
- Size of facilities

Table 2. SUPPLIERS PROFILED

3M	Nobel 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

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Table 3: PRODUCT CLASSES AND CATEGORIES PROFILED

AUTOMATED WAREWASHES	SURFACE CLEANERS
Machine dishwashing detergents	Degreasers
Dish machine sanitizers	Disinfectants and sanitizers (including bleach)
Machine delimers	Floor cleaners
Rinsing and drying aids	General-purpose cleaners
MANUAL WAREWASHES	Glass cleaners
Manual dishwashing detergents	Oven and griddle cleaners
Manual dish sanitizers	SPECIALTY CLEANERS
Presoaks	Drain cleaners
HAND CARE	Lime scale removers (used outside dish machines)
Hand soaps	Scouring cleansers
Hand sanitizers	Stainless steel cleaners
AIR FRESHENERS AND ODOR ELIMINATORS	All other*

* Includes silver polish, furniture polish, brass polish, mildew removers, and other miscellaneous kitchen cleaning products



REPORT BENEFITS

This report 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 nearly 800 structured surveys of end-use decision makers and in-depth interviews with suppliers and distributors

Information on key trends including the impact of COVID-19, changes 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.

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