

9th Edition



# Janitorial and Housekeeping Cleaning Products:

## U.S. Market Analysis and Opportunities

Published October 2017

Base Year: 2017

Forecasts to 2022

Regional Coverage: United States

A comprehensive analysis of the janitorial and housekeeping cleaning products market, focusing on key changes, challenges, and business opportunities.

### This Report Helps Address the Following:

- Complete analysis of the market by product, end use, supplier, and distribution channels
- The current and future outlook for key product segments, including the challenges in the floor care sector and emerging opportunities in hand care, odor control, and other segments
- The current and future outlook for building service contactors, including penetration rates, purchases, and other key factors and trends
- An analysis of acquisition activity, including a perspective on ways in which new ownership may change competitive rivalry and market dynamics

Now featuring an *interactive online database* with the ability to export sales data for all product classes, categories, product forms, suppliers, and end-use segments.



## Report Contents

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### EXECUTIVE SUMMARY

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  - Product classes (see Table 2)
  - Product categories (see Table 2)
  - Product form (liquid vs. solid)
- Trends and opportunities
- Relationship to other cleaning segments
- Competitive landscape
- Channels of distribution
- Private-label activity
- Methods of cleaning
- Role of contract cleaners
- Critical buying factors
- Outlook and appraisal

### END-USE SEGMENT PROFILES

Pertinent information and insightful analysis for each of the 16 major end-use segments listed in Table 1. The following information is provided:

- Introduction
- Structure of the industry
- Methods of cleaning
- Overall market in 2016 and 2017 with comparison to 2014
- Products
- Distribution channels
- Suppliers
- Role of contract cleaners
- Outlook and assessment

### SUPPLIER PROFILES

Brief profiles of approximately 80 suppliers of janitorial and housekeeping cleaning products. Profiles include descriptions of companies businesses, location, products, and sales. A representative list is shown in Table 3.

### PRODUCT CATEGORY PROFILES

General information on major janitorial and housekeeping product categories listed in Table 2, supplements detailed information found on each category in the end-use segment profiles. The following information is provided:

- Total consumption
- Total consumption by end use
- Suppliers

**Table 1: End-Use Segments Profiled**

Assisted living facilities
Colleges and universities
Contract cleaners
Fast-casual restaurants
Fast-food restaurants
Full-service restaurants
Government facilities
Hospitals
Industrial facilities
Lodging establishments
Nursing homes
Office buildings
Recreational facilities
Retail outlets
Schools
Miscellaneous end uses-a

a- Includes caterers, religious member organizations, transportation depots, commercial bakeries, and other minor end users.

**Table 2: Product Classes and Categories Profiled**

FLOOR-CARE PRODUCTS	HARD-SURFACE PRODUCTS
Floor waxes and finishes	General purpose cleaners
Floor strippers	Disinfectants and sanitizers
Floor cleaners	Glass cleaners
Floor spray buffs	Toilet bowl cleaners
Wood floor cleaners	Furniture polishes
HAND-CARE PRODUCTS	Bathroom drain cleaners
Liquid hand soaps	Specialty cleaners-a
Foam hand soaps	Ammonia and bleach
Bar soaps	ODOR-CONTROL PRODUCTS
Instant hand sanitizers	CARPET-CARE PRODUCTS
Powdered and waterless hand soaps	AIR AND FABRIC REFRESHERS

a- Includes granite, stainless steel, metal polishes, scouring and cream cleansers.



**Table 3: Suppliers Profiled**

- |   |  |  |
|---|--|--|
| ■ 3M  | ■ Envirochem                                 | ■ PLZ Aeroscience (Apollo Technologies/<br>Claire Manufacturing) |
| ■ ABC Compounding                                       | ■ EnvirOx                                    | ■ PortionPac Chemical  |
| ■ Aire-Master of America                                | ■ Essential Industries                       | ■ Prochem  |
| ■ Amano Pioneer Eclipse                                 | ■ Fresh Products                             | ■ Products Chemical  |
| ■ American Wax Company<br>(American Cleaning Solutions) | ■ Fuller Brush Commercial                    | ■ Quest Chemical   |
| ■ Athea Laboratories                                    | ■ Georgia-Pacific                            | ■ Reckitt Benckiser Professional                                 |
| ■ Betco   | ■ GOJO Industries                            | ■ Rochester Midland  |
| ■ Bradford Soap Works                                   | ■ Guest Supply                               | ■ SC Johnson   |
| ■ Brulin & Company                                      | ■ Henkel                                     | ■ Sealed Air   |
| ■ Buckeye International                                 | ■ Hillyard                                   | ■ Simoniz USA  |
| ■ Bullen Companies                                      | ■ Intercon Chemical                          | ■ Spartan Chemical   |
| ■ Canberra  | ■ ITW Professional Brands                    | ■ State Industrial Products                                      |
| ■ Carroll   | ■ Janisan                                    | ■ Stearns Packaging  |
| ■ Chase Products  | ■ Kelsan                                     | ■ STERIS   |
| ■ Chemical Packaging Corporation                        | ■ Kimberly-Clark                             | ■ Sunburst Chemicals   |
| ■ Chemical Specialties                                  | ■ Kleenco Products                           | ■ Sunshine Makers  |
| ■ Chemspec  | ■ Kutol Products                             | ■ Supreme Industrial Products                                    |
| ■ Church & Dwight                                       | ■ LMC Enterprises (Chemco and Flo-Kem)       | ■ Surco Products   |
| ■ Cintas Corporation                                    | ■ Marietta Hospitality (KIK Custom Products) | ■ Theochem Laboratories  |
| ■ Clorox Professional Products                          | ■ Minuteman Multi-Clean                      | ■ Twi-Laq Industries   |
| ■ Colgate-Palmolive                                     | ■ Misco Products                             | ■ United Laboratories  |
| ■ Core Products   | ■ National Chemical Laboratories             | ■ Valley Products  |
| ■ Damon Industries                                      | ■ NCH  | ■ Warsaw Chemical  |
| ■ Diamond Chemical                                      | ■ Nilodor                                    | ■ West Industries  |
| ■ Diversey  | ■ NYCO Products                              | ■ Wexford Labs   |
| ■ Dreumex   | ■ P&G Professional                           | ■ Zep, Inc.  |
| ■ Earth Friendly Products                               |  |  |
| ■ Ecolab  |  |  |





## Scope

This is Kline's benchmark study of the U.S. away-from-home business, including floor and carpet care, hard surface cleaning and sanitizing, hand care and odor control products. This comprehensive report provides a complete quantitative and qualitative analysis of this \$4.0 billion market. Based on over 1,000 interviews, combined with the data and insight gleaned from eight previous editions issued during the past 25 years, this study provides a complete analysis and perspective of this important market. The scope of the study is the United States only, based on a statistically-significant platform of structured interviews with commercial, industrial, and institutional end users. The base year for the data in the study is 2017, and the study also presents forecasts from 2017 to 2022.

## Key Benefits

The report provides comprehensive data and analysis to help subscribers to understand market dynamics, identify opportunities and threats and ultimately improve long-term competitive position. Written for a diverse audience, the report is utilized extensively by product managers, strategists, and executives in a range of companies at each level of the value chain. The supplier section profiles approximately 100 competitors in this diverse and variegated business. Profiles for larger suppliers also provide estimates of sales by product and end use. These profiles also help the reader to conduct segmentation analysis and are useful for strategic planning and acquisition analysis. Specifically, the report also addresses the following:

- An examination of dilution and dispensing systems, including penetration rates, supplier shares, and key factors and trends
- Analysis of floor and carpet care equipment and dispensing systems for hand care and odor control products
- An examination of critical success factors and key buying dimensions in the market channel for janitorial and housekeeping cleaning products
- A detailed analysis and market segmentation of key supplier types, including full-line branded suppliers, professional businesses of household suppliers, private labelers, and local and regional competitors
- A detailed analysis of marketing channels, including a detailed quantitative analysis and a qualitative appraisal of traditional and emerging intermediaries and also the role of private labels



## 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 50-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.

### Primary Research

**We Know Who to Talk to. We Know How to Listen.**



During the course of field research, we conducted a two-pronged primary research approach to understanding this market. This methodology has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research represents the major component of the overall research methodology for this report.

- First, in order to understand the market from the end-user's perspective, Kline conducted hundreds of structured surveys with a wide range of end users to understand how foodservice cleaning chemicals are used, where they are purchased, and changing trends impacting this market.
- Second, our professional consulting staff conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including suppliers, distributors, regulators, industry associations, and other key trade sources.

### Secondary Research

**We Know Where to Look – Mining the Details.**



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline's internal database, consisting of over half a century's syndicated research.

### Comprehensive Market Intelligence

**We Know How to Verify.**



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline's proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

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