



 KlinePULSE

INDUSTRIAL & INSTITUTIONAL CLEANING INDUSTRY TRENDS

U.S. Annual Subscription Service

2021

 Kline

➤ PROGRAM HIGHLIGHTS

- Based on Kline's vast database of market size and industry trends
- Updated with rigorous primary and secondary research
- Comprehensive coverage of categories and major end-use segments
 - Including sales estimates, forecasts, and end-user survey response data
 - Updated statistics on number of facilities and occupancy rates
- Full-picture assessment of all distribution channels
- Emerging industry trends
- Exclusive subscriber benefits; fresh content published monthly



► PUBLICATION SCHEDULE

With KlinePULSE, you will receive timely updates on the industry.

1. Four **In-Depth reports** will provide a comprehensive assessment of important business issues.
2. Eight **Hot-Topic briefs** will provide timely, succinct deliverables that are easily digestible and will help inform business decisions throughout the year.

APR	MAY	JUN	JUL	AUG	SEP
Impact of COVID-19 on the Janitorial Cleaning Market	Automation and IoT in the I&I Cleaning Industry	Sustainable Cleaning Trends	Spotlight on Education End-Use Segment	Supply Chain Challenges	Changes in Cleaning and Hygiene Protocols
OCT	NOV	DEC	JAN 22	FEB 22	MAR 22
Spotlight on Healthcare End-Use Segment	Spotlight on Restaurants End-Use Segment Executive Presentation**	Shifts in Distribution Channels	Spotlight on Industrial End-Use Segment	Supplier Sales, Share, and Rankings	Year in Review and Industry Outlook

LEGEND:

In-Depth Report

Hot-Topic Brief

****Exclusive Premium Subscriber Benefit**

► PUBLICATION SCHEDULE: IN-DEPTH REPORTS

JUNE 2021



SUSTAINABLE CLEANING TRENDS

Assessment of professional cleaning products made with renewable, biodegradable ingredients that are not tested on animals, do not contain harmful ingredients, and/or are sold in recyclable packaging. Provides an overview of sustainable cleaning products and processes including review of regulations, product claims, and certifications.

DECEMBER 2021



SHIFTS IN DISTRIBUTION CHANNELS

Comprehensive analysis on shifting distribution channels for professional cleaning products including distributors, retailers, ecommerce, and other channels. Understand which channels are preferred by which end-use segments and how purchasing through these channels are shifting during COVID-19.

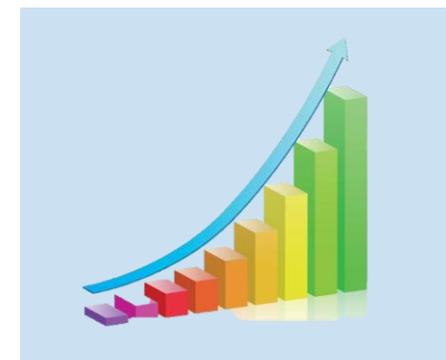
SEPTEMBER 2021



CLEANING AND HYGIENE CHANGES AMONG END USERS

Stay abreast of consumption changes by product class by end-use segment with specific examples of changes made to cleaning and hygiene protocols. Outlines product form preferences, dispenser preferences, and product attribute importance.

MARCH 2022



YEAR IN REVIEW AND OUTLOOK

Outlines major trends that are defining the market in 2021 and a 5-year outlook. Provides 2021 sales by product class, category, end-use segment, and leading suppliers with a forecast through 2026. Analysis of the impact of COVID-19 on the industry and how the virus will shape the market in the future.

► PUBLICATION SCHEDULE: HOT-TOPIC BRIEFS



Impact of COVID-19 on Janitorial Industry

Sales forecasts by product class and end-use segment for the industry through 2025



Automation and IoT in the I&I Cleaning Industry

Outlook on major trends in automation and their expected impact on the janitorial cleaning industry



Spotlight on Education End-Use Segment

Provides updates on key trends impacting education including changes in cleaning protocols, lockdown status and outlook, and sales forecasts



Supply Chain Challenges

Understand the latest developments pertaining to shortages of raw materials, packaging components, fluctuations in labor costs, and logistical challenges. Assessment of current challenges, market trends, and an outlook on expected timelines and what the future holds



Spotlight on Healthcare End-Use Segment

Provides updates on key trends impacting the healthcare sector including changes in cleaning protocols, lockdown status and outlook, and sales forecasts



Spotlight on Restaurants End-Use Segment

Provides updates on key trends impacting restaurants including changes in cleaning protocols, lockdown status and outlook, and sales forecasts



Spotlight on Industrial End-Use Segment

Provides updates on key trends impacting industrial facilities including changes in cleaning protocols, lockdown status and outlook, and sales forecasts



Supplier Sales, Share, and Rankings

Competitive assessment of sales, share, and rankings of the leading I&I players



PRODUCT CATEGORIES

Hard-Surface Cleaning

- Disinfectants and sanitizers
- General purpose cleaners
- Glass cleaners
- Furniture polish
- Toilet bowl cleaners
- Drain cleaners
- Specialty cleaners
- Surface cleaning wipes

Hand Care

- Gel hand sanitizers
- Foam hand soaps
- Foam hand sanitizers
- Liquid hand soaps
- Hand cleaning wipes
- Bar soaps
- Industrial heavy duty (pumice/grit) hand soaps

Floor Care

- Floor cleaners
- Floor strippers
- Floor waxes
- Floor spray buffs
- Wood floor cleaners

Air and Odor Control

- Air and fabric refreshers
- Deodorizers and odor control products

Carpet Care

- Shampoo and cleaners
- Spot removers
- Deodorizers and anti-static agents

DISTRIBUTION CHANNELS

Direct sales

Distributors

- Jan/san and paper houses
- Foodservice distributors
- Medical/surgical distributors
- General supply distributors

Retailers

- Warehouse clubs
- Mass merchants/food and grocery stores
- Home improvement stores
- Office supply stores
- Cash and carry outlets

Ecommerce

- Distributor websites
- Retailer websites
- Independent online retailers like Amazon

Other

- GPOs
- Company-owned distribution arm or commissary
- Textile rental firms

END-USE SEGMENTS

Building Service Contractors

- Contractors/contract cleaners

Healthcare

- Hospitals
- Assisted living facilities
- Nursing homes
- ED/Urgent care
- Doctors' and dentists' offices

Education

- Daycare Centers
- Preschools
- K-12 schools
- Colleges and universities

Industry

- Industrial facilities
- Office buildings
- Government facilities

Lodging establishments

Restaurants

- Fast-casual restaurants
- Fast-food restaurants
- Full-service restaurants

Retail outlets

Other

- Airports
- Convention centers
- Train stations
- Bus stations/depots
- Recreational facilities
- Fitness facilities
- Spas/salons

DELIVERABLES

MARKET REPORTS

- These reports look at the big picture, delivering key **insights**, growth drivers, market dynamics, product **trends**, and where the industry is headed.

CATEGORY REPORTS

- Kline's data is trusted because it is sourced from extensive primary research with both end users and manufacturers and distributors.
- Objective information to help inform new product developments, confirm industry developments, benchmark the competition, and inform discussions with customers
- Full coverage of all channels of distribution including distributors, retailers, ecommerce, direct sales, and other channels
 - Comprehensive analysis of end-use segments, uncovering opportunities for growth
 - Full analysis of cleaning chemicals and wipes
 - **Market trends** and new product launches
 - Sales and market share for leading brands and suppliers
 - Understanding end-user preferences
 - Outlook

CHANNEL REPORTS

- Building on our vast database of data and insights from our end-user surveys, Kline will conduct in-depth B2B interviews with suppliers, distributors, trade associations, and other industry experts to understand key market shifts, covering:
 - **New market trends** and developments
 - Shifts in cleaning and hand hygiene protocols
 - Supply chain challenges
 - Shifts in distribution channels
 - Outlook including expected timelines

HOT-TOPIC REPORTS

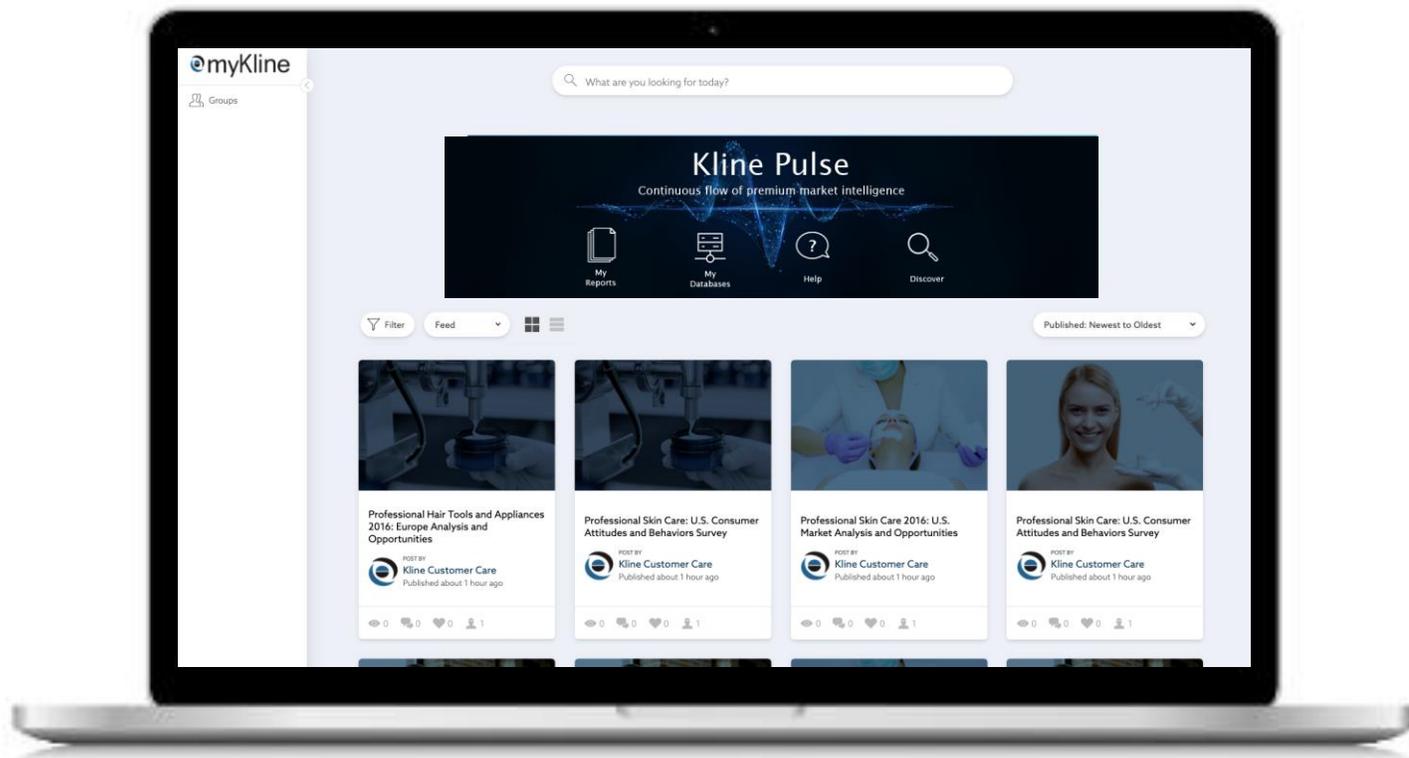
- Our reports take a deep dive into important topics impacting the industry, such as dilution/dispensing trends, sustainability, and automation/AI.

EXCLUSIVE SUBSCRIBER BENEFITS

- Our seasoned team of industry experts is at your disposal to deliver a customized presentation, help you dive deeper into our content, and prep for the coming year. One day of dedicated service time is included per year.

NEW! KlinePULSE

Our new, easy-to-use online report delivery system lets you access our incisive research in a flexible and time-saving manner.



Time-saving functionalities of KlinePULSE

Full portfolio search ability
Powerful, AI-based search functionality that makes it quick and easy to find your content

Multiple filters
Deep filtering options by industry, type, content, and publication

Easy access to reports
View reports and attachments in-app or download them

Personalized feed
Like, follow, bookmark, share, and flag for review

➤ SUBSCRIPTION BENEFITS

Subscribers receive a continuous flow of our premium market intelligence content.



- Validate internal data and assumptions
- Trusted third-party source
- Stay abreast of market developments and trends
- Assess the market and competition
- Identify opportunities and threats
- Inform new product development
- Evaluate channel diversification opportunities
- Strategic planning



Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the agrochemicals, chemicals, materials, energy, life sciences, and consumer products industries for more than 60 years.

For more information, visit www.KlineGroup.com.

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