



 KlinePULSE

INDUSTRIAL & INSTITUTIONAL CLEANING INDUSTRY TRENDS

Annual Service
2022

 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



SCOPE



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

Cleaning Wipes

- Hard surface wet wipes
- Hand cleaning wet wipes
- Floor Care (disposable and reusable microfiber mops)
- Other dry wipers for absorption, dusting, and electronics

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
- Chemical manufacturer websites
- Independent online retailers such as 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
- Ambulatory surgery centers

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



I&I CLEANING PULSE REPORTS

- These reports look at the big picture, delivering key insights, growth drivers, market dynamics, product trends, and the direction in which the industry is headed.
- Kline's data is trusted because it is sourced from extensive primary research with both end users, and manufacturers and distributors
- The studies provide objective information to help inform new product developments, confirm industry trends, benchmark the competition, and inform discussions with key customers.
- The reports provide full coverage of all distribution channels, including distributors, retailers, e-commerce, direct sales, and other channels.

END-USE SPOTLIGHT REPORTS

- 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 and forecasts

MARKET SIZING REPORTS

- Building on our vast database of data and insights from our end-user surveys, Kline conducts in-depth B2B interviews with suppliers, distributors, trade associations, and other industry experts to understand key market shifts, covering:
 - Sales by end-use segment
 - Sales by product type
 - Sales, share, and ranking of major suppliers
 - Year in review and forecasts to 2025

KEY TREND REPORTS

- Our reports take a deep dive into important topics impacting the industry, such as:
 - Changes in cleaning protocols
 - Sustainability
 - New technologies such as extended-release disinfection.
 - Supply chain and labor challenges
 - Shifts in distribution channels

► 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 **key trend briefs** will provide timely, succinct deliverables that are easily digestible and will assist in business decision-making throughout the year

APR 22	MAY 22	JUN 22	JUL 22	AUG 22	SEP 22
Sustainable Cleaning	Spotlight on Recreational End-Use Segment	Spotlight on Hospitality End-Use Segment	Changes in Cleaning and Hygiene Protocols	Spotlight on Retail End-Use Segment	Key Trends in Cleaning Wipes
OCT 22	NOV 22	DEC 22	JAN 23	FEB 23	MAR 23
Supply Chain and Labor Challenges	Shifts in Distribution Channels and E-commerce	Technological Impacts on the Professional Cleaning Market	Spotlight on Restaurant End-Use Segment	Supplier Sales, Share, and Rankings	Year in Review and 5-Year Industry Outlook Executive Presentation*

LEGEND:

In-Depth Report

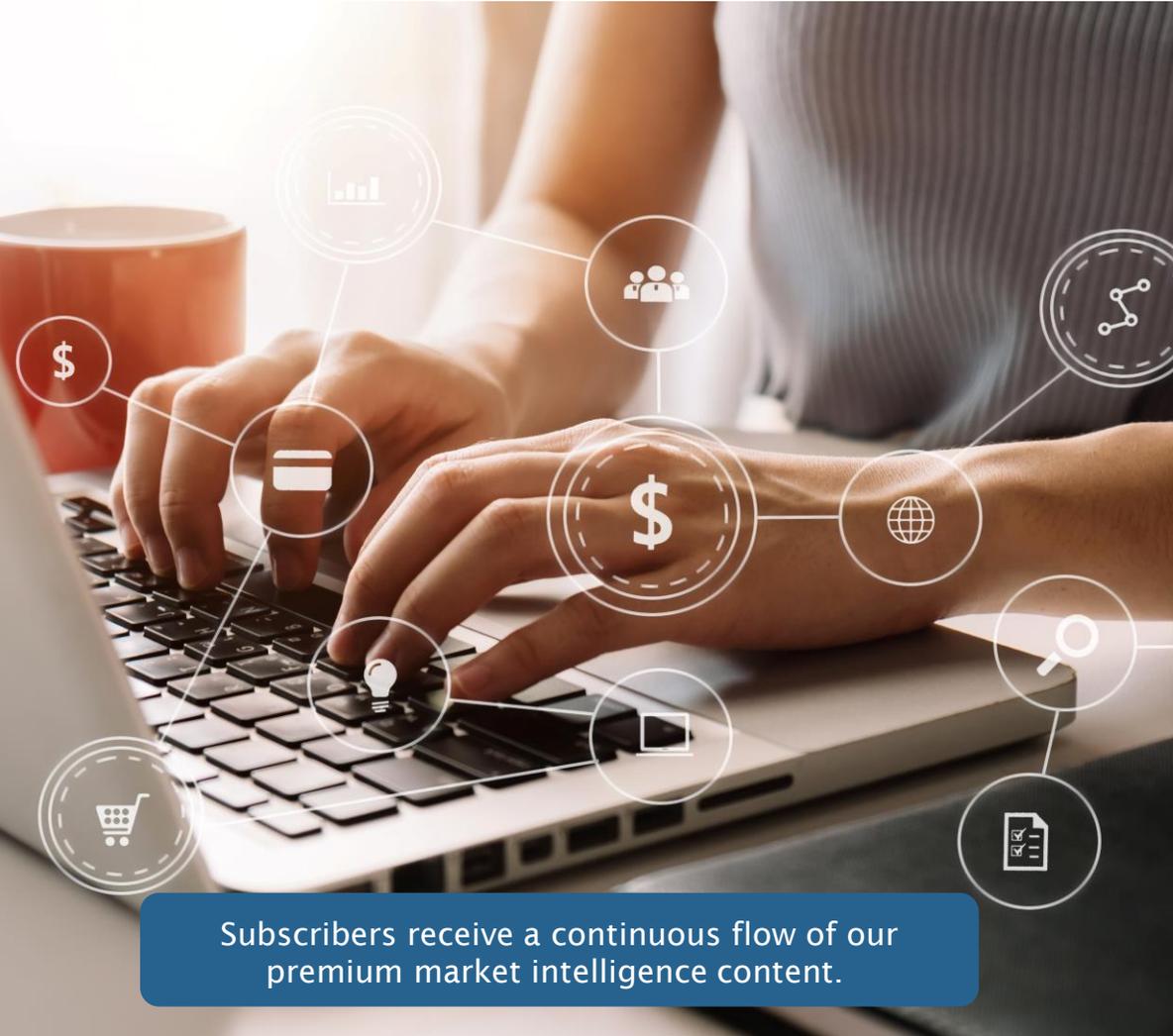
Key Trend Brief

***Exclusive Premium Subscriber Benefit**

Deliverables*:

- In-Depth Reports x4
- Key Trend Briefs x8
- Executive Presentation x1

➤ 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 developments
- Evaluate channel diversification opportunities
- Strategic planning

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



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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.

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