



2nd Edition

# Laundry Chemical Products USA: Market Analysis and Opportunities

Published September 2018

Base Year: 2017

Forecasts to 2022

Regional Coverage: ■ United States

A comprehensive analysis of the laundry chemicals market, focusing on key changes, challenges, and business opportunities.

## This Report Helps Subscribers Address the Following:

- Complete analysis of this \$1 billion market by end-use segment, product category, supplier and channels of distribution
- The current and future outlook for key sectors, including commercial laundries and major and minor on-premises laundries (OPLs)
- The penetration of textile rental and its future outlook in key market sectors, as well as consolidation into shared and central facilities in the hospital sector and other segments
- The impact of environmental sustainability and the role of green cleaning products and alternative processes
- The role of machinery, including washer/extractors and continuous batch washers (CBWs) or tunnels, as well as dispensing equipment
- Understanding end users perspectives on emerging trends such as Internet of Things (IoT), shifts in channels of distribution where laundry chemicals are purchased, and fabric/linen trends

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

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- Competitive landscape
- Channels of distribution
- Private-label activity
- Methods of cleaning
- Critical buying factors
- Emerging trends (IoT, sustainability, green cleaning)
- Laundry benchmarks by end-use segment such as spending by product category, cost per pound of laundry, types of laundry done, etc.)
- Outlook and appraisal

### End-use Segment Profiles

Pertinent information and insightful analysis for each of the 8 major end-use segments listed in Table 1. The following information is provided:

- Introduction
- Structure of the industry
- Methods of cleaning
- Critical buying factors
- Overall market in 2016 and 2017 with comparison to 2011
- Products
- Distribution channels
- Suppliers
- Outlook and assessment

### Product Category Profiles

General information on 7 major laundry chemical 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

### Supplier Profiles

Brief profiles of over 40 suppliers of laundry chemical products shown in Table 3. Profiles include overview of business, location, products, and sales.



**Table 1: End-use Segments**

Commercial laundries
Hospitals
Lodging establishments
Extended care (includes nursing homes, assisted living facilities, and independent living facilities)
Prisons and jails
Shirt laundries
Major on-premise laundries
Small on-premise laundries

**Table 2: Product Categories**

Bleach
Breakers
De-stainer
Detergent
Scent enhancers
Softeners
Sour

**Table 3: Suppliers**

A.L.C.O. Soap and Supply Company	Ecolab
Alco Chemical	Energy Mizer
American Paper & Twine Company	Gurtler
Amfree, Inc.	Henkel
Anderson Chemical	Hillyard
Arrow Paper Corporation	Intercon Chemical
Athea Laboratories	Melaleuca
Avmor	Myers Supply
Auto-Chlor	Noble Chemical
Betco Corporation	Norchem
Bob Barker Company	Procter & Gamble Professional
Butler Chemicals	Pariser Industries
Christeyns	PDQ Manufacturing
Church & Dwight	Perkins (Gordon Food Service)
Clean Innovations	PortionPac Chemical Corporation
CP Industries	Rayco, Inc.
Diamond Chemical	Spartan Chemical
Diversey	Sunburst Chemicals
Diversified Chemical Products	UNX Incorporated
E.J. Thomas Company	Washing Systems, Inc. (WSI)
EBP Supply Solutions	Zep





## Scope

This is Kline's 2nd edition of the U.S. away-from-home laundry cleaning chemicals market. This comprehensive report provides a complete quantitative and qualitative analysis of this \$1 billion market. Based on over 500 structured surveys of end users of laundry chemicals, the study provides a complete analysis and insights on 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 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 can be utilized extensively by product and market managers, strategic planners, and executives in a range of companies. The suppliers section profiles approximately 50 competitors in this diverse and variegated business. Profiles for larger suppliers also provide estimates of sales, in total and by end use. These profiles also help the reader to conduct segmentation analysis and are useful for strategic planning and acquisition analysis. Specifically, the report addresses the following:

- An analysis of the nuances that differentiate the three core sectors of the business—commercial laundry, major and minor OPL
- Analysis of products and systems, including detergents, sour, softener, destainer, and other categories
- 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 detailed quantitative analysis and a qualitative appraisal of traditional and emerging intermediaries and also the role of private label
- An examination of key benchmarks for end users including amount of laundry done, types of laundry done, cost per pound of laundry, types of machines used, and textile rental trends
- Understand costs for end users including chemicals, labor, linen replacement, utilities, and water
- An examination of critical success factors and key buying factors and shifts in distribution channel preferences among end users
- Market assessment within the broader context of the global market for I&I cleaning and maintenance products



## 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.

During the course of field research, we conducted over 500 structured surveys with decision makers across eight end-use segments. In addition, Kline’s professional staff of industry experts conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including manufacturers of chemicals and machinery, distributors, end users, and other key trade sources.

### Primary Research

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



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Distributors
- End users
- Suppliers
- Trade organizations

### 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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