

Janitorial and Housekeeping Cleaning Products USA 2010:

Market Analysis and Opportunities

7th Edition

Published October 2010

Base Year: 2010

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

- Complete analysis of the market, by product, by end use, by supplier, and by marketing 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 impact of environmental sustainability and the role of green cleaning products in the business
- 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 perspective on ways in which new ownership may change competitive rivalry and market dynamics

Report 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 complete quantitative and qualitative analysis of this \$3.6 billion market. Based on more than 1,000 interviews, combined with the data and insight gleaned from six previous editions issued during the past 25 years, the study provides 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 2010, and the study also presents forecasts from 2010 to 2015.

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 103 competitors in this diverse and variegated business. Profiles for larger suppliers will 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
- 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 critical success factors and key buying dimensions in the market channel for janitorial and housekeeping cleaning products
- Market assessment within the broader context of the global market for I&I cleaning and maintenance products

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2. EXECUTIVE SUMMARY

3. INDUSTRY OVERVIEW

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5. CONTRACT CLEANERS

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8. HOSPITALS

9. LODGING ESTABLISHMENTS

10. SCHOOLS

11. NURSING HOMES

12. RECREATIONAL FACILITIES

13. GOVERNMENT FACILITIES

14. FAST-FOOD RESTAURANTS

15. FULL-SERVICE RESTAURANTS

16. COLLEGES

17. OFFICE BUILDINGS

18. ALL OTHER END USES

The report provides the following information for each end-use segment:

- Introduction
- Structure of the industry
- Methods of cleaning
- Overall market for 2010
- Products
- Packaging
- Critical buying factors
- Distribution channels
- Suppliers
- Role of contract cleaners
- Future outlook
- Assessment

19. SUPPLIERS (pproximately 100 Profiles)

20. PRODUCT SUMMARIES

(Technical data from previous editions is omitted; market data only)

- Floor-care products
 - Floor waxes and finishes
 - Floor strippers
 - Floor cleaners
 - Floor spray buffs
- Hard-surface products
 - General-purpose cleaners
 - Disinfectants and sanitizers
 - Glass cleaners
 - Toilet bowl cleaners
 - Furniture polishes
 - Bathroom drain cleaners
 - Scouring cleaners
 - Ammonia and bleach
- Hand soaps
 - Liquid hand soaps
 - Bar soaps
 - Instant hand sanitizers
 - Waterless hand soaps
 - Foam soaps
 - Powdered hand soaps
- Carpet-care products
- Odor-control products

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, we conducted approximately 1,007 structured interviews with end users of janitorial and housekeeping cleaning products. In addition, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including manufacturers, distributors, end users, and other key trade sources.

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.

In addition, this analysis was supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

Kline Credentials

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 chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

Recently published or in-progress research for the Industrial/Institutional Cleaners industry includes:

- Food Service Cleaning Products 2008
- Janitorial & Housekeeping Cleaning Products
- Green Cleaning Products 2008
- Food Processing Cleaning Products 2005

Kline's research and consulting services extend across the entire cleaning and maintenance products industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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