

Janitorial and Housekeeping Cleaning Products USA 2010:

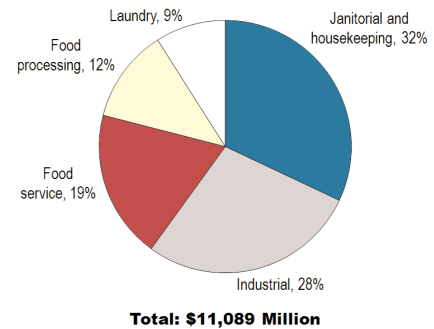
Market Analysis and Opportunities Analysis

Fact Sheet

The Market

The total U.S. market for industrial and institutional cleaning products exceeds \$11 billion in 2010 at the end-user level. Janitorial and housekeeping cleaning products are the leading component of the business, accounting for almost one-third of the industry total. In 2010, consumption of janitorial and housekeeping cleaning products by commercial and institutional facilities reach an estimated \$3,589 million in end-user dollars. This represents average annual growth of 3.3% from \$3,156 million in 2006.

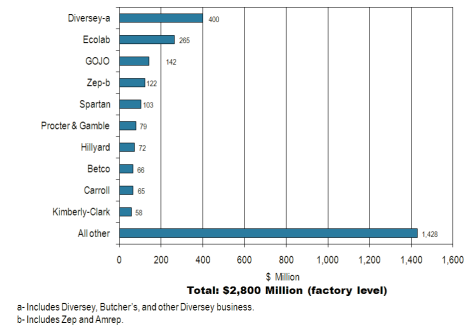
Forecasts for U.S. Janitorial and Housekeeping Cleaning Products Industry, 2010 to 2015



Competitive Landscape

The top 10 suppliers of food service cleaning products and laundry chemicals account for about 80% to 85% at the factory level. Diversey is the market leader with estimated sales of \$286 million and a 10% share at the factory level in 2010. When sales for Butcher's and other businesses of Diversey are included, the consolidated sales of Diversey are an estimated \$400 million, or 14% at the factory level. Ecolab ranks second in the business with an estimated \$265 million in sales and a 9% share, followed by GOJO, Zep, and Spartan.

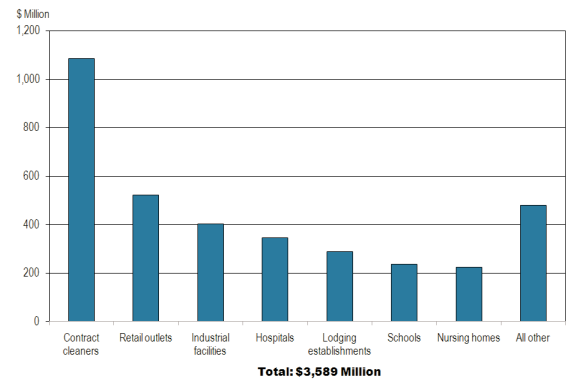
Leading Suppliers of Janitorial and Housekeeping Cleaners, 2010



Consumption by End-use Segment

Contract cleaners lead the janitorial and housekeeping market, accounting for approximately 30% of the total business. Other major segments include retail outlets, industrial facilities, hospitals, lodging, schools and nursing homes. In addition to nursing homes, assisted living and retirement communities have grown rapidly and are emerging as a significant segment.

U.S. Consumption of Janitorial and Housekeeping Cleaning Products by End Use, 2010



Future Outlook

Consumption of janitorial and housekeeping cleaning products is projected to reach an estimated \$4,242 million at the end user's level in 2015. This represents an average annual increase of 3.4% from \$3,589 million in 2010. This slow but steady growth is based in part on expectations of a moderate pricing environment, continuing adjustments in floor care programs, and steady increases in hand care usage after an unprecedented surge in demand following the H1N1 outbreak.

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