

Food Service Cleaning Products 2008:

U.S. Market Analysis and Opportunities

6th Edition

Published October 2008

Base Year: 2008

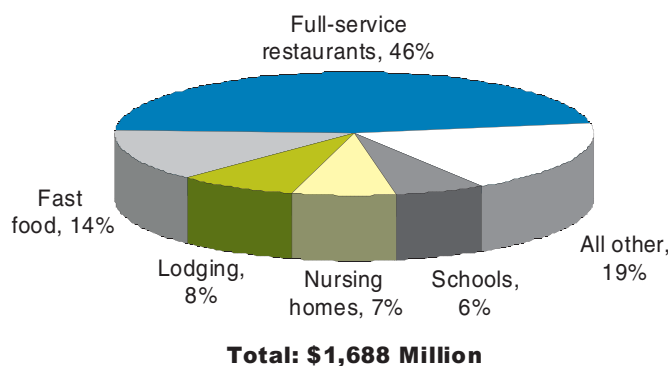
This comprehensive analysis provides a new look at this market and addresses such topics as:

- The impact of consolidation among suppliers, distributors, and end users
- Growth opportunities for important segments such as fast food establishments, lodging, and restaurants and for new and emerging segments such as assisted living centers
- Competition among full-line suppliers, makers of household brands, and distributors promoting house brands
- Consumption and buying patterns among different customer groups and factors that influence the purchasing decision
- Evolving distribution channels, including alternative formats, direct selling, private labeling, and the role of warehouse clubs and other retailers
- The changing shape and image of the contract feeding industry
- The impact of low-temperature warewash leasing programs and other dish machine options

Report Scope

Food Service Cleaning Products 2008: U.S. Market Analysis and Opportunities is a comprehensive qualitative and quantitative analysis of this sector, which is estimated to reach more than \$1.9 billion in 2008. This report examines the broad group of end-use markets for this industry, the largest of which is full-service restaurants.

Figure 1
**Estimated U.S. Consumption of Food Service Cleaning Products
by End-Use Segment, 2008**



Each end-use chapter profiles the consumption and buying patterns of the different customer groups, analyzes the market position of key suppliers, and provides attitudinal scaling of critical buying factors.

This study also provides in-depth analysis of major product categories, distribution channels, warewash machinery, and the critical issues affecting the market, including consolidation, alternative formats, direct selling, and private labeling.

Key Benefits

- Supplier profiles that can be used for competitive benchmarking as well as identifying potential merger and acquisition candidates
- Detailed analysis of the competitive terrain to help subscribers to segment the market and identify sustainable niches in end-use segments and product categories
- A thorough examination of the marketing channel and key and emerging intermediaries to help subscribers to formulate winning channel strategies
- Data-rich analysis of specific end-use segments and product categories to assist both market and strategic planners and brand and category managers
- Insight into emerging trends like green cleaning and opportunities and threats like private labeling to help management to address market change and devise winning strategies

Forecasts in this report were generated with Kline's *FutureView Scenario Forecasting Model*. With the enhanced forecasts, subscribers can see how adjustments in the assumptions behind the forecasts can bring about different outcomes.

Report Contents

1. INTRODUCTION

- Scope
- Sources and methods

2. EXECUTIVE SUMMARY

- Market overview
- Market segmentation
 - Consumption by end use
 - Consumption by product group
 - Consumption by product category
- Suppliers
- Future outlook
- Opportunities

3. INDUSTRY OVERVIEW

- Consumption: 2008
 - By end use
 - By product
 - By form
- Relationship to other cleaning segments
- Relationship to the global warewash cleaning market
- Suppliers
- Channels of distribution
- Channel structure
- Private-label business
- Methods of cleaning
- Low-temperature warewash programs
- Pricing and margins
- Critical buying factors
- Raw materials
- Packaging
- Average unit volume
- Role of contractors

4. OUTLOOK AND APPRAISAL

- Future outlook: 2013
- Business appraisal

5. FULL-SERVICE RESTAURANTS

6. FAST-FOOD RESTAURANTS

7. NURSING HOMES

8. LODGING ESTABLISHMENTS

9. SCHOOLS

10. HOSPITALS

11. INDUSTRIAL FACILITIES AND OFFICE BUILDINGS

12. GOVERNMENT FACILITIES

13. COLLEGES AND UNIVERSITIES

14. RETAIL HOSTS

15. RECREATIONAL FACILITIES

16. MISCELLANEOUS END USES

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

- Introduction
- Structure of the industry
- Overall market: 2008
- Products
- Methods of cleaning
- Low-temperature warewash programs
- Distribution channels
- Critical buying factors
- Suppliers
- Role of contractors
- Future outlook: 2013
- Assessment

17. SUPPLIERS (67 profiles)

18. PRODUCT SUMMARIES

- Dish machine sanitizers
- Floor cleaners
- General-purpose cleaners
- Glass cleaners
- Kitchen drain cleaners
- Lime scale removers
- Liquid and foam hand soaps
- Machine dishwashing detergents
- Manual dishwashing detergents
- Oven and griddle cleaners
- Presoaks
- Rinse and drying aids
- Sanitizers and bleaches
- Scouring cleaners
- Scouring pads
- Stainless steel cleaners
- All other 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 insights is accurate, current, and reliable.

During the course of field research, 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 and marketers of food service cleaning products, makers of machinery and equipment, distributors and other channel intermediaries, end users, and other industry sources. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research comprises the bulk of the overall research methodology for this report. Kline conducted 900 interviews with end users, distributors, suppliers, and other industry sources based on a stratified, random sample that accounts for size of establishment, region, and chain/independent affiliation.

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

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- Food Processing Cleaning Products USA 2006 (4th Edition)
- Food Service Cleaning Products USA 2004 (5th Edition)
- Janitorial and Housekeeping Cleaning Products 2006 (6th Edition)
- Household Cleaning Products USA (published annually)

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