



1st Edition

Floor Care Pads and Tools: U.S. Market Analysis and Opportunities

Published June 2019

Base Year: 2018

Forecasts to 2023

Regional Coverage: United States

A comprehensive analysis of the market for floor care pads, mop pads, cleaning carts, and other tools used in industrial and institutional settings, including end users' usage patterns, market trends, and sales and market share of the leading suppliers. This report is designed to be used as a companion report to Kline's *Janitorial and Housekeeping Cleaning Products* study where floor care cleaning chemicals are profiled.

This Report is Designed to:

- Provide comprehensive analysis of the floor care pads and tools market including sales, growth, and market shares of leading suppliers.
- Help subscribers learn about flooring and floor machinery trends and their impacts on floor care pads and tools.
- Deliver key insights from end users including usage patterns, critical buying factors, and channels of distribution trends.
- Forecast sales and market share expectations for floor care pads and tools in the future.

Report Contents

Introduction

- Scope
- Geographic regions
- Sources and methods
- Assumptions and remarks

Executive Summary

- An overview of key findings
- Market size and segmentation
- Analysis and consumption by:
 - Product class and category (see Table 1)
 - End-use segment (see Table 2)
- Trends and opportunities
- Impact of flooring and machinery trends on pads and tools sales
- Competitive landscape
- Usage patterns
- Critical buying factors
- Outlook and appraisal

End-use Segment Profiles

Pertinent information and insightful analysis for each of the major end-use segments listed in Table 2. The following information is provided:

- Introduction and description
- Overall market, 2017 and 2018
- Annual spending changes, 2017 to 2019
- Product usage
- Usage of disposable versus reusable products
- Purchase intentions
- Preferred attributes
- Information sources
- Overall satisfaction
- Purchasing channels
- Future outlook and appraisal

Product Category Profiles

Pertinent information and insightful analysis of each of the categories shown in Table 1, including the following information:

- Market trends and usage frequency
- Size of the market in 2017 and 2018
- Sales by end-use segment (see Table 2)
- Sales by leading suppliers (see Table 3)
- Outlook and assessment

Company Profiles

Profiles of approximately 15 leading manufacturers are provided, including the following information:

- Overview of business
- Corporate sales (if public)
- Floor pads and tools offered
- Sales of floor pads and tools in 2016 and 2017
- Share of the market in 2016 and 2017
- Merger/acquisition activity of note
- How products are sold to end users
- Forecast of future sales through 2023

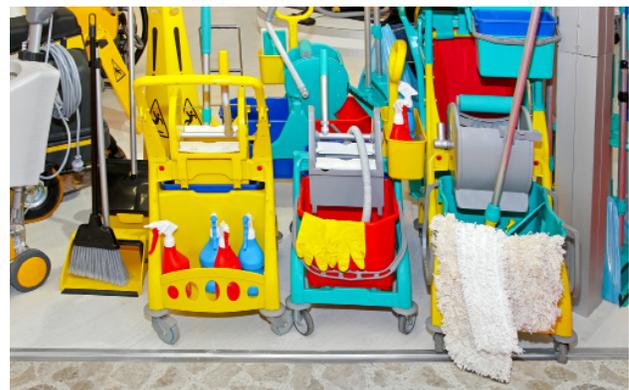




Table 1: Product Classes and Categories Profiled

Floor pads	Mop pads	Tools
Buffing/cleaning floor pads	Disposable mop pads	Brooms
Burnishing floor pads	Re-launderable mop pads	Buckets
Diamond floor pads	Disposable dust-mop pads	Cleaning carts
Scrubbing floor pads	Non-disposable dust-mop pads	Dust pans
Specialty/polishing/other floor pads	String wet mops	Floor signs
Stripping floor pads		High-dusting tools
		Mop handles or poles with frame/backer plates and floor finish applicator tools

Table 2: End-use Segments Profiled

Building service contractors (BSCs)
Colleges and universities
Extended care (nursing homes, assisted and independent living)
Fitness facilities and studios
Government facilities
Hospitals (including surgery centers and clinics)
Industrial facilities
Lodging establishments
Office buildings
Restaurants (fast-casual and fast-food)
Retailers (convenience, grocery, and mass merchandisers)
Schools (grades K-12)
Miscellaneous (airports, train stations, convention centers, sports arenas, and others)

Table 3: Companies Profiled

3M
ACA Enterprises
ACS Cleaning Products (includes ETC and Treleoni)
Americo Manufacturing
Bona
Carlisle
Contec
Continental Commercial Products
Diversey (including Twister and Taski pads)
Filmop International
Golden Star
Hospeco
Impact Products
Libman
Niagara Machine
New Pig
Norton
O-Cedar
O'Dell Corporation
OnFloor Technologies
Pioneer Eclipse
Procter & Gamble Professional
Rubbermaid
Tennant
Unger



Scope

Floor Care Pads and Tools: U.S. Market Analysis and Opportunities represents the first edition of this report for Kline & Company, but it is related to floor care chemicals, which the company has profiled for over 30 years. With this study, we aim to understand the relative use of disposable and re-useable floor pads and mop pads, how large the professional floor pads and tools market is, how fast the market is growing, product usage trends and frequency, sales and growth of major suppliers, and a five-year forecast for this market. The report covers the U.S. market for industrial and institutional floor care pads and tools and provides end-user level sales data for products and companies in 2017 and 2018. Floor care cleaning chemicals and machinery are excluded from this report.

Key Benefits

This study provides subscribers with accurate and current information and insights about the I&I floor pads and tools market, profiles of major companies, and extensive research with commercial end users to understand the size of the market, key usage trends, and how machinery usage impacts sales of floor care chemicals. Specifically, this report is designed to provide subscribers with:

- An understanding of the market size for floor pads, mop pads, and tools and leading companies
- An assessment of the relative size of suppliers and their market shares and how that is changing over time
- Insights on key trends, maintenance methods, and usage patterns and how they differ by end-use segment
- An understanding of flooring and floor care machinery trends and the impact those trends have on the pads and tools market
- An overview of end users' preferences for channels of distribution and critical buying factors
- A forecast of sales and share expectations for these products in the future



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 60 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.

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.

510 structured surveys of end users are conducted to assess floor pads, mop pads, and tools trends; usage; and maintenance methods. In addition, in-depth discussions with suppliers, distributors, trade organizations, and others knowledgeable in the industry are conducted.

- End users
- Suppliers
- Distributors
- 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 60 years.

A FULL SPECTRUM OF SERVICES

CUSTOM
RESEARCH

MARKET
RESEARCH
REPORTS

MANAGEMENT
CONSULTING

North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277