



1st Edition

Foodservice Cleaning Products in Europe: Market Analysis and Opportunities

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Base Year: 2018

Forecasts to 2023

Regional Coverage: France ■ Germany ■ United Kingdom

This report provides subscribers with a comprehensive assessment of the market for foodservice cleaning chemicals in France, Germany, and the United Kingdom. The report focuses on key trends, changes, challenges, and business opportunities. This analysis also helps subscribers understand how end users purchase and use such products, the role of cleaning contractors, regulatory impacts, and the competitive landscape in this industry.

This Report Helps Subscribers to:

- Size the market by product, end use, and supplier
- Assess current and future outlook for key product segments and end-use segments
- Learn about end users' needs and how they buy foodservice cleaning products
- Analyze market distribution in Europe and emerging trends
- Benchmark competitors with insightful profiles of key suppliers in the industry
- Uncover future opportunities for growth



Report Contents

Introduction

Executive Summary

Provides a regional European overview of foodservice cleaning market including market sizes of the three largest markets including: France, Germany, and the United Kingdom. Analysis of market size, segmentation by product category, end-use segments, and companies and key findings and conclusions for the European region.

Country Reports

Provides an assessment of the foodservice cleaning market in each country shown in Table 1. Each includes analysis of market trends, market size, market segmentation by product category and end-use segments, leading suppliers, distribution channel analysis, and sales forecasts.

Product Category Profiles

For each category listed in Table 2, the following regional information is provided:

- Trends in foodservice cleaning products
- 2017 and 2018 sales by country, supplier, and end-use segment
- Sales forecast through 2023

End-use Profiles

For each end-use segment shown in Table 3, the following regional information is provided:

- Overview and structure of end-use segment
- Trends in foodservice cleaning products
- 2017 and 2018 sales of foodservice cleaning products
- Preferred product forms, dispensing methods, and dish washing machine preferences
- Leading suppliers and brands
- Role of contract cleaners
- Distribution channel analysis
- Sales forecast through 2023

Supplier Profiles

For each company shown in Table 4, the following regional information is provided:

- Overview of the business including location, number of employees, total revenues
- Sales of foodservice cleaning products
- Presence in end-use segments
- Distribution
- Outlook through 2023



Table 1: Countries

France
Germany
United Kingdom

Table 2: Product classes/categories

AUTOMATIC DISHWASHING PRODUCTS

Dish machine delimers
Dish machine detergents
Dish machine disinfectants and sanitizers
Rinsing and drying aids

MANUAL DISHWASHING PRODUCTS

Manual dish sanitizers
Manual dishwashing detergents
Presoaks

HARD-SURFACE CLEANERS

Degreasers
Delimers
Floor cleaners
General-purpose cleaners
Hard-surface disinfectants
Kitchen drain cleaners
Oven and grill cleaners
Specialty cleaners-a
Stainless steel cleaners

HAND-CARE PRODUCTS

Hand sanitizers
Hand soaps

AIR FRESHENERS AND ODOR CONTROL PRODUCTS

a- Includes glass cleaners, scouring cleaners, and silver polish.





Table 3: End-use Segments

Contract caterers-a

Government offices and facilities and commercial office buildings

Hospitals

Lodging establishments

Nursing homes and assisted living facilities

Restaurants-b

- Fast-casual
- Full-service
- Quick-serve

Schools and universities

a- Includes facility management companies that operate foodservice areas and are responsible for cleaning food preparation and foodservice areas within other end-use facilities.

b- Includes cafes and restaurants serving alcoholic beverages and food such as pubs and bars.

Table 4: Suppliers

FRANCE

Laboratories Rochex

Orapi

GERMANY

Buzil

Dr. Schnell

Dr. Weigert

Hagleitner

Kiehl

Schülke & Mayr

UNITED KINGDOM

Cleenol

Evans Vanodine

Selden

MULTINATIONAL SUPPLIERS

Diversey

Ecolab

Procter & Gamble Professional

Werner & Mertz Professional





Scope

This report provides a thorough assessment of the market for foodservice cleaning chemicals in France, Germany, and the United Kingdom. The information in the report will be obtained through extensive primary research conducted in Europe with suppliers, distributors, end users, regulators, and industry associations. This study addresses formulated chemicals used to clean, disinfect, sanitize, and improve the overall cleanliness and appearance of the wares and surfaces of commercial and institutional kitchens. The study includes products consumed by commercial and industrial kitchens including volume purchased through retailers, but excludes household cleaners for consumer household use. The geographical scope includes France, Germany, and the United Kingdom. Data is provided for 2017 and 2018 with forecasts made to 2023.

Key Benefits

Kline & Company has been serving the industrial and institutional cleaners industry for nearly 60 years. Foodservice Cleaning Products in Europe: Market Analysis and Opportunities is a detailed assessment of foodservice cleaning products and the suppliers who offer them. Benefits for subscribers are summarized below:

- Detailed analysis of the competitive terrain to help subscribers segment the market and identify sustainable niches in end-use segments and product categories.
- A thorough examination of marketing channels and key and emerging intermediaries to help subscribers 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.
- Analysis of critical issues including food safety compliance, technology-enabled efficiency and automation, labor-saving devices, and minimum wage increases.



Methodology

Kline uses a two-pronged approach to compile this study. First, we conducted hundreds of structured surveys with end users of foodservice cleaning products. Then we gathered industry trends and insights from in-depth interviews with manufacturers, distributors, trade organizations, and other experts to form the basis of this report.

Primary Research

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



We know who to talk to. We know how to listen.

During the course of field research, we will conduct a two-pronged primary research approach to understanding this market.

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.

- First, our professional consulting staff conducted in-depth discussions and personal interviews in local languages with a wide range of knowledgeable industry participants and opinion leaders, including suppliers, distributors, regulators, industry associations, and other key trade sources.
- Second, in order to understand the market from the end-users' perspective, Kline conducted hundreds of structured surveys with a wide range of end users to understand how I&I cleaning products are used, where they are purchased, and changing trends impacting this market.

Secondary Research

We Know Where to Look – Mining the Details.



In addition, this analysis will be supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; and Internet sources.

In addition, Kline's professional staff of industry experts gathers statistical data from government, industry, and relevant trade associations and agencies.

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 procurement and assessment, 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.

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