



8th Edition

Foodservice Cleaning Products: U.S. Market Analysis and Opportunities

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Forecasts to 2022

Regional Coverage: United States

A comprehensive qualitative and quantitative analysis of this \$2.5+ billion sector. This report examines a broad group of end-use segments, the largest of which are full-service restaurants. Each end-use chapter profiles 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, food safety compliance, technology-enabled efficiency and automation, labor-saving devices, and minimum wage increases.

This Report Helps Subscribers Understand:

- Growth opportunities for important segments, such as fast-casual restaurants, lodging, and retail hosts
- Consumption and buying patterns among different customer groups and factors that influence the purchasing decision
- Competition among full-line suppliers, makers of household brands, and distributors promoting house brands
- The impact of consolidation among suppliers, distributors, and end users
- Evolving distribution channels, including alternative formats, direct selling, office supply stores and websites, private labeling, and the role of warehouse clubs and other retailers
- Split between owned and leased, hot and low temperature, and level of user satisfaction with warewash machines

*Now featuring an **interactive online database** with the ability to export sales data for all product classes, product categories, product forms, suppliers, and end-use segments.*



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 - Product category (see Table 2)
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- Methods of cleaning
- Critical buying factors
- Future outlook and appraisal



End-use Profiles

Pertinent information and insightful analysis for each of the 13 major end-use segments listed in Table 1. The following information is provided:

- Introduction
- Structure of the industry
- Products
- Methods of cleaning
- Low-temperature and high-temperature warewash programs
- Distribution channels
- Critical buying factors
- Suppliers
- Role of contract cleaners
- Future outlook and assessment

Product Category Profiles

General information on major foodservice cleaning product categories listed in Table 2, which supplements detailed information found on each category in each end-use chapter. The following information is provided:

- Total consumption
- Consumption by end use
- Suppliers

Supplier Profiles

Brief profiles of about 50 suppliers of foodservice cleaning products. Each profile includes a description of the company's business, location, and sales. A representative list is included in Table 3.



Table 1: End-use Segments

Colleges and universities
Fast-casual restaurants
Fast-food restaurants
Full-service restaurants
Government facilities
Hospitals
Industrial facilities and office buildings
Lodging establishments
Nursing homes and assisted living facilities
Recreational facilities-a
Retail hosts
Schools
Miscellaneous end uses-b
a- Includes health clubs, amusement parks, country and golf clubs, bowling alleys, movie theaters, museums, sporting arenas, zoos, concert halls, and the like.
b- Includes bars, pubs, craft breweries, wineries, and other miscellaneous end users.

Table 2: Product Classes and Product Categories

Product class/category
AUTOMATED WAREWASHES
Machine dishwashing detergents
Dish machine sanitizers
Rinsing and drying aids
MANUAL WAREWASHES
Manual dishwashing detergents
Presoaks
Scouring pads
JANITORIAL CLEANERS
Air fresheners and odor eliminators
Degreasers
Floor cleaners
Foam hand soaps
General-purpose cleaners
Glass cleaners
Kitchen drain cleaners
Lime scale removers
Liquid hand soaps
Oven and griddle cleaners
Sanitizers and bleaches
Scouring cleaners
Stainless steel cleaners
All other-a
a- Includes silver polish, bar soaps, gel hand sanitizers, and other miscellaneous products.



Table 3: Suppliers

3M	Ecolab	Sanitech
ABC Compounding	Envirochem Inc.	Spartan Chemical
Auto-Chlor System	Flo-Kem	Spurrier Chemical Company
Betco Corporation	GOJO Industries	State Industrial
Buckeye International	Gordon Food Service	Sunburst Chemicals
Canberra Corporation	Henkel	Sysco
Carroll Company	Kimberly-Clark	Termac
Chemmark	Midlab	Theochem Laboratories
Chemtron	Nyco Products	UNX Chemicals
Church & Dwight	P&G Professional	USFS
Cintas	Pariser Industries	Walter E. Nelson Co.
Clorox Professional Products	PDQ Manufacturing	Warsaw Chemical
Colgate-Palmolive	Performance Food Group	Zep
Diversey	PortionPac Chemical Corporation	
Earth Friendly Products	RB Professional	





Scope

Foodservice Cleaning Products: U.S. Market Analysis and Opportunities is a comprehensive qualitative and quantitative analysis of this \$2.5+ billion sector. This report examines the broad group of end-use segments for this industry, the largest of which is full-service restaurants.

- 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 addresses products consumed by commercial and institutional kitchens—including the volume purchased through warehouse clubs and retailers—but excludes household cleaners purchased by consumers for household use
- Market analysis across 13 end-use segments including consumption and buying patterns
- Sales and market share by suppliers
- Profiles of nearly 50 suppliers of foodservice cleaning chemicals
- Understanding trends in distribution channels
- Assessment of warewash machinery

Key Benefits

Kline & Company has been serving the industrial and institutional cleaners industry for over 50 years. Foodservice Cleaning Products: U.S. 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 the marketing channel 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.



During the course of field research, we conducted 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, in order to understand the market from the end-user’s perspective, Kline conducted hundreds of structured surveys with a wide range of end users to understand how foodservice cleaning chemicals are used, where they are purchased, and changing trends impacting this market.
- Second, our professional consulting staff conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including suppliers, distributors, regulators, industry associations, and other key trade sources.

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 over 50 years.

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