

1st Edition



Janitorial Cleaning Products in Europe:

Market Analysis and Opportunities

Published December 2015

Base Year: 2014

Forecasts to 2019

Regional Coverage: France ■ Germany ■ Italy ■ Spain ■ The United Kingdom

This report provides subscribers with a comprehensive assessment of the European market for janitorial cleaning chemicals. 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 janitorial 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 janitorial cleaning market including market sizes of the five largest markets including: France, Germany, Italy, Spain, 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 janitorial 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 janitorial cleaning products
- 2013 and 2014 sales by product form, supplier, and end-use segment
- Leading suppliers and brands
- Distribution channel analysis
- Sales forecast through 2019

Table 1: Countries

France
Germany
Italy
Spain
United Kingdom

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 janitorial cleaning products
- 2013 and 2014 sales of janitorial cleaning products
- Preferred product forms
- Distribution channel analysis
- Major suppliers
- Sales forecast through 2019

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
- Janitorial cleaning brands/lines
- End-use segments where the company has a presence
- How its janitorial cleaning products are sold and marketed to end users
- Recent M&A activity
- 2013 and 2014 sales estimates of janitorial cleaning products
- Sales forecast through 2019

Table 2: Product Categories

Hard-surface cleaners (floor cleaners, general hard surface cleaners and sanitizers, bathroom surface cleaners)
Hand cleaners and sanitizers (liquid and foam hand soaps, instant hand sanitizers, powdered and waterless hand soaps, and bar soaps)
Odor-control products
Carpet-care products

Table 3: End-use Segments

Building and contract cleaners
Hospitals
Lodging
Nursing homes and assisted living facilities
Restaurants
Schools and universities



Table 4: Suppliers

FRANCE

Anios

Orapi

Prodene Klint/GOJO

GERMANY

Buzil

Dr. Schnell

Kiehl

ITALY

È Così

Italchimica

Kemika

SPAIN

Prohigien\Proder

Proquimia

Quimsa ITW

UNITED KINGDOM

Cleenol

Evans Vanodine

Selden

Zenith

MULTINATIONAL SUPPLIERS

Ecolab

Schülke

Sealed Air/Diversey

Sutter Professional

Werner & Mertz





Scope

This report provides a thorough assessment of the European market for janitorial cleaning chemicals. The information in the report was obtained through extensive primary research conducted in Europe with suppliers, distributors, end users, regulators, and industry associations. The geographical scope includes France, Germany, Italy, Spain, and the United Kingdom. Data is provided for 2013 and 2014 with forecasts made to 2019.

Key Benefits

The report provides comprehensive data and analysis to help subscribers understand market dynamics, identify opportunities and threats in the janitorial cleaning products industry, and ultimately improve long-term competitive position. Written for a diverse audience, the report can be utilized extensively by product managers, strategists, and executives in a range of companies at each level of the value chain. Supplier profiles include multinational companies competing in Europe, as well as large local and regional suppliers. Specifically, the report also addresses the following:

- Complete analysis of the janitorial cleaning chemicals market, by product, by end use, and by supplier
- Analysis of janitorial cleaning chemicals market including supplier shares, and key factors and trends
- A detailed analysis of marketing channels, including estimates of direct sales, sales through distributors, and retail sales
- Assessment of opportunities for janitorial cleaning chemicals by country
- The current and future outlook for key product segments and end-use segments
- Understanding of end users' needs and how they buy janitorial cleaning products
- Assessment of market distribution in Europe and emerging trends
- Insightful profiles of key suppliers in the industry
- Uncovering future opportunities for growth



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 insight is accurate, current, and reliable.

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 will conduct 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-user's perspective, Kline will conduct 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 over 50 years.

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