



Freedonia Focus Reports
US Collection

Laundry & Linen Services: United States

February 2018



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Environmental & Regulatory Factors	6
3. Segmentation & Forecasts	8
Revenues	8
Drycleaners & Laundries	10
Uniform Launderers	13
Linen Launderers	15
Coin-Operated Laundries	17
4. Industry Structure	21
Industry Characteristics	21
Market Leaders	25
Cintas	26
CSC ServiceWorks	27
US Dry Cleaning Services	27
5. About This Report	28
Scope & Method	28
Sources	29
Industry Codes	29
Resources	30

List of Tables & Figures

Figure 1 Key Trends in US Laundry & Linen Service Revenues, 2017 – 2022	3
Figure 2 US Laundry & Linen Service Revenue Trends, 2007 – 2017	4
Table 1 Key Indicators for US Laundry & Linen Service Revenues, 2007 – 2022 (US\$ bil)	5
Figure 3 US Laundry & Linen Service Revenues by Establishment Type, 2007 – 2022 (US\$ mil)	8
Table 2 US Laundry & Linen Service Revenues by Establishment Type & Market, 2007 – 2022 (US\$ mil)	8
Figure 4 US Laundry & Linen Service Revenues by Market, 2007 – 2022 (US\$ mil)	9
Figure 5 US Drycleaner & Laundry Revenues & Finance, Professional, & Business Employment, 2007 – 2022	10
Figure 6 US Drycleaners & Laundries Employer-Firm Revenues by Source, 2012 (%)	12
Figure 7 US Uniform Launderer Revenues & Retail Sales, 2007 – 2022	13
Figure 8 US Uniform Launderers Employer-Firm Revenues by Source, 2012 (%)	14
Figure 9 US Linen Launderer Revenues & Healthcare, Accommodations, & Food Establishments, 2007 – 2022	15
Figure 10 US Linen Launderers Employer-Firm Revenues by Source, 2012 (%)	16
Figure 11 US Laundry & Linen Service Revenues by Establishment Type, 2007 – 2022 (%)	17
Figure 12 US Coin-Operated Laundry Revenues & Multiple Unit Housing Stock, 2007 – 2022	18
Figure 13 US Coin-Operated Laundries Employer-Firm Revenues by Establishment Type, 2012 (%)	19
Table 3 US Washing Machine Ownership Rate & Living Arrangement by Age of Household Head, 2017 (%)	20
Figure 14 US Washing Machine Ownership Rate & Living Arrangement by Age of Household Head, 2017 (%)	20
Figure 15 US Laundry & Linen Services Employer & Nonemployer Establishments Revenue Shares, 2015 (%)	21
Table 4 US Laundry & Linen Services Firms, Establishments, & Employment, 2007 – 2015	22
Figure 16 US Laundry & Linen Services Firms, Establishments, & Employment, 2007 – 2015	23
Figure 17 US Laundry & Linen Services Industry Revenue Concentration, 2002 – 2012 (%)	23
Figure 18 US Laundry & Linen Services Industry Revenue Concentration by Segment, 2012 (%)	24
Table 5 Leading Participants in the US Laundry & Linen Service Industry by Establishment Type	25
Table 6 Industry Codes Related to Laundry & Linen Service Revenues	29

About This Report

Scope & Method

This report forecasts to 2022 US laundry and linen service revenues in nominal US dollars. Total revenues are segmented by establishment type in terms of:

- drycleaners and laundries
- uniform launderers
- linen launderers
- coin-operated laundries

Segments are also grouped in terms of business-to-business market segments (i.e., uniform and linen laundries) and consumer market segments (i.e., drycleaners and laundries, and coin-operated laundries).

To illustrate historical trends, total revenues and the various segments are provided in annual series from 2007 to 2017. In addition, the number of employer firms, employer establishments, nonemployer establishments, and employment by establishment type are provided in annual series from 2007 to 2015.

This report represents the revenues of employer and nonemployer establishments. Excluded from the scope of this report are revenues from coin-operated laundries in multiple-unit housing operated by property managers. However, revenues from coin-operated laundries in multiple-unit housing managed by laundry service companies (also referred to as route operators) are included.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading launderers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Laundry & Linen Services: United States (FF95026) represents the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their launderers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 6 | Industry Codes Related to Laundry & Linen Service Revenues

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Classification	
812310	Coin-Operated Laundries and Drycleaners	7211	Power Laundries, Family and Commercial
812320	Dreccleaning and Laundry Services (except Coin-Operated)	7212	Garment Pressing, and Agents for Laundries and Drycleaners
812331	Linen Supply	7213	Linen Supply
812332	Industrial Launderers	7215	Coin-operated Laundries and Drycleaning
		7216	Drycleaning Plants, Except Rug Cleaning
		7218	Industrial Launderers
		7219	Laundry and Garment Services, NEC

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Freedonia Industry Studies

Elder Care Services in the US, November 2017

Global Industrial & Institutional Cleaning Chemicals, October 2017

Solvents, July 2016

Industrial & Institutional Cleaning Chemicals, June 2016

Freedonia Focus Reports

Deathcare: United States

Demographics: United States

Employment Services: United States

Household Laundry Equipment: United States

Lodging Services: United States

Medical Services: United States

Repair Services: United States

Restaurants & Foodservice: United States

Waste Management: United States

Freedonia Custom Research

Trade Publications

American Coin-Op

American Drycleaner

American Laundry News

Laundry and Cleaning News International

Agencies & Associations

Bureau of Economic Analysis

Coin Laundry Association

Drycleaning & Laundry Institute International

Multi-Housing Laundry Association

United States Census Bureau

United States Department of Energy

United States Environmental Protection Agency