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Janitorial Equipment & Supplies

US Industry Study with Forecasts to **2011 & 2016**

Study #2181 | March 2007 | \$4400 | 237 pages



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Wipes are expected to see the highest gains (8.7 percent annually) among janitorial products due to their convenience, portability, efficiency, and ability to reduce cross contamination.

US demand to rise 3.3% yearly through 2011

US demand for janitorial equipment and supplies (excluding chemical products) is projected to rise 3.3 percent annually through 2011 to \$7.6 billion. Substantial gains in nonresidential construction expenditures, an increase in nonresidential floor space, gains in resident population, and a rising number of business establishments will all support demand. Product advancement in all segments will be influenced by increasing concerns pertaining to ergonomics, the environment, indoor air quality, and health issues.

Wipes, backpack vacuums to see notable gains

Of the major product segments, automated floor cleaners are projected to see the fastest gains through 2011. Among the more specific products, wipes are expected to see the highest gains (8.7 percent annually) due to their convenience, portability, efficiency, and ability to reduce cross contamination. Backpack vacuums are also expected to see notable gains, with a projected rate of 6.3 percent per annum through 2011. These vacuums have grown in popularity because of their ergonomic design as well as their ease of use. Bags and containers will grow slower than in the past due to smaller increases in plastic and other material costs, which spiked up in recent years.

US Janitorial Equipment & Supplies Demand by Type (\$6.5 billion, 2006)



Industrial building market to outpace other segments

While all markets are expected to see gains through 2011, the industrial building market is anticipated to significantly outpace all others, as industrial construction expenditures continue to rebound after a sharp decline in the 2001-2004 period. The office and institutional markets together comprised over one-half of total demand in 2006. While the institutional market will post above-average gains, the office market will see below-average advances. Gains in the residential market will also be below average due to the significant drop in new housing and a deceleration in housing stock growth.

South, West to see fastest market gains by region

Among US regions, the South held the largest share of demand in 2006 and is expected to see the most significant gains through 2011. This region has a more favorable outlook in terms of construction activity, population growth, and overall growth in GDP. The West will fare almost as well, while the Midwest and the Northeast are anticipated to see below-average gains.

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Sample Text, Table & Chart

PRODUCTS

Vacuum Cleaners

Demand for commercial-use vacuum cleaners is projected to reach \$5 million in 2011, which is a significant increase from the 2006 period. Advances will be a result of wider sweeping paths, lighter weight units, and improved tank materials. These advances will address concerns about indoor air quality in nonresidential floor space where carpet is still a fact that more than 50 percent of the floor area in nonresidential markets is carpet. Despite the increasing use of hard surface flooring, carpet remains the floor covering of choice for many businesses, primarily due to ergonomic concerns and safety issues as on-the-job injuries are less likely and less severe in a carpeted environment.

Backpack vacuums are expected to see the fastest growth in the market by increasing interest in ergonomically designed products. Features such as ease of operation and ability to be used in small spaces will also support demand growth. Uprights will continue to hold the largest share of vacuum cleaner demand due to their product design, ease of use and filtration capabilities. Tank and wet/dry vacuum demand will be supported by the increasing use of hard surface flooring and multiple floor coverings in a single environment.

The office market accounts for the largest share of commercial vacuum cleaners, but the growth rate in the institutional market is expected to exceed that of the office market through 2011. These markets are the most significant nonresidential carpet and rug consumers. Vacuum cleaners are a key component of building maintenance. Demand for vacuum cleaners is expected to occur in all markets and is being aided by the increase in nonresidential building construction. Producers of commercial-use vacuum cleaners for the

74

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TABLE V-5

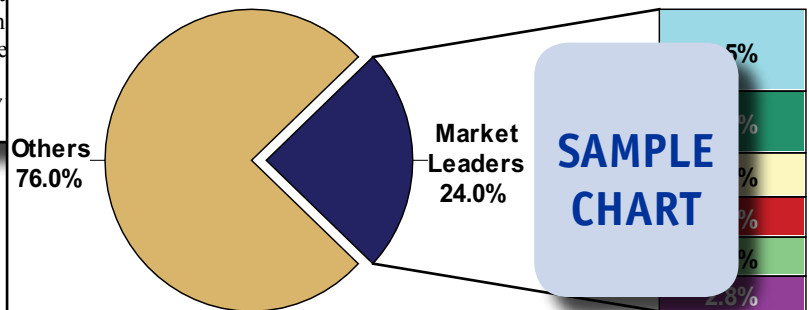
NORTHEAST JANITORIAL EQUIPMENT & SUPPLIES DEMAND BY SUBREGION & MARKET (million dollars)

Item	1996	2001	2006	2011	2016
Northeast GDP (bil \$)	1712	2174	2705	3310	4015
\$ products/000\$ GDP	0.59	0.54	0.49	0.45	0.42
NE Nonres Floor Space (bil sq ft)	14.2	14.2	14.2	14.2	17.8
\$ products/000 sq ft	4.2	3.8	3.4	3.2	2.4
Janitorial Equipment/Supplies Demand	5.9	5.5	5.0	4.7	3.7
By Subregion:					
New England	1.5	1.4	1.3	1.2	1.0
Middle Atlantic	4.4	4.1	3.7	3.5	2.7
By Market:					
Office	2.0	1.9	1.8	1.7	1.4
Institutional	1.2	1.1	1.0	0.9	0.7
Commercial	1.6	1.5	1.4	1.3	1.0
Industrial	0.8	0.8	0.7	0.7	0.5
Residential	0.8	0.8	0.8	0.8	0.6
Other	0.1	0.1	0.1	0.1	0.1
Contract Cleaners	0.0	0.0	0.0	0.0	0.0
% Northeast	0.34	0.25	0.18	0.14	0.09
Janitorial Equipment & Supplies	4.2	3.8	3.4	3.2	2.4

SAMPLE TABLE

CHART VI-1

US JANITORIAL EQUIPMENT & SUPPLIES MARKET SHARE, 2006 (\$6.5 billion)

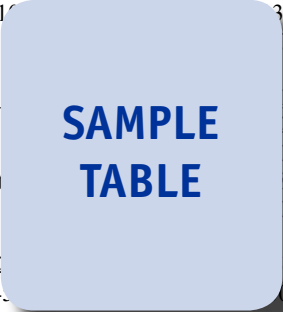


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE IV-2
OFFICE BUILDING DEMAND FOR JANITORIAL EQUIPMENT & SUPPLIES
 (million dollars)

Item	1996	2001	2006	2011	2016
Office Building Space (bil sq ft)	10	10	10	10	10
\$ products/000 sq ft	3.4	3.4	3.4	3.4	3.4
Office Building Market	1	1	1	1	1
Manual Cleaning Products	0.20	0.20	0.20	0.20	0.20
Bags & Containers	0.03	0.03	0.03	0.03	0.03
Automated Floor Cleaning Equipment	0.35	0.35	0.35	0.35	0.35
Other Products & Accessories	0.02	0.02	0.02	0.02	0.02
% office	2.7	2.7	2.7	2.7	2.7
Janitorial Equipment & Supplies	4.0	4.0	4.0	4.0	4.0



COMPANY PROFILES

Katy Industries Incorporated

765 Straits Turnpike, Suite 2000
 Middlebury, CT 06762
 203-598-0397
<http://www.katyindustries.com>

Sales: \$440 million
 US Sales: \$440 million
 Employees: 1,000



Key Products: floor sweepers, dust pans, squeegees, brooms, scrub and other brushes, floor bonnets

Katy Industries is a diversified manufacturing firm that operates through a number of subsidiaries. The Company's operations are organized into 2 segments: Maintenance Products and Electrical Products.

The Company is active in the US janitorial equipment and supply industry through the Maintenance Products business group, which had 2005 sales of \$248 million. Through this group, Katy manufactures and distributes commercial cleaning products, home and automotive storage products, and abrasives. These products are sold to janitorial/sanitary and foodservice distributors for supply to restaurants, hotels, health care facilities, schools and other venues. The Company's cleaning products and sanitary maintenance supplies are manufactured primarily through the Continental Commercial Products LLC subsidiary (Bridgeton, Missouri), which acts as a holding company for such divisions as Continental, Glit/Microtron, Wilen Products Incorporated and Disco that produce related cleaning and sanitary items. All four operations share a distribution center in Chino, California.

The Continental division's products include a wide range of commercial cleaning items sold under the CONTINENTAL, KLEEN AIRE,

"The office building market, including banks and other financial institutions, is the largest market for janitorial equipment and supplies, representing 27 percent of total demand in 2006. Demand for janitorial equipment and supplies in this market is projected to increase 3.0 percent per annum through 2011 to \$2.0 billion. Growth in nonresidential floor space in the office market is expected to decelerate slightly over the forecast period, which will restrain demand."

--Section IV, pg. 103

OTHER STUDIES

Commercial Printing

Revenues for the US commercial printing industry will reach \$82 billion in 2011. Lithographic printing will remain dominant while digital printing will grow the fastest based on lower cost, quick turnaround and ease of customization for short printing runs. Advertising will stay the top use while the label and wrapper printing segment leads gains. This study analyzes the US commercial printing industry, with forecasts for 2011 and 2016 by process and application. It also evaluates market share and profiles major players.

#2204 07/2007..... \$4400

Commercial & Residential Cleaning Services

US commercial and residential cleaning service sales will grow 5.3% annually through 2011. Gains will be driven by the shift toward "do-it-for-me" cleaning services in the residential market, and by the outsourcing of noncore functions in the nonresidential market. This study analyzes the \$48.4 billion US contract cleaning service industry, with historical data and forecasts for 2011 and 2016 presented by service, market and region. The study also evaluates company market share and profiles leading players.

#2191 05/2007..... \$4400

Building Maintenance Services

US revenues for building maintenance services will rise 5.6% annually through 2011, aided by a shift away from "do-it-yourself" to "do-it-for-me" maintenance for businesses and households. The nonresidential market will grow the fastest while swimming pool and building systems services will lead gains by type. This study analyzes the \$69.9 billion US building maintenance service industry to 2011 and 2016 by type, market and region. It also evaluates company market share and profiles industry competitors.

#2177 04/2007..... \$4400

Power Lawn & Garden Equipment

US demand for power lawn and garden equipment will reach \$10.5 billion in 2011. Gains will be driven by consumer-driven product innovations and up-grades, and by the rising number of golf courses and professional landscapers. Lawnmowers will remain the largest product segment while turf and grounds equipment will grow the fastest. This study analyzes the US power lawn and garden equipment industry to 2011 and 2016 by product, market and region. It also evaluates market share and profiles major players.

#2174 03/2007..... \$4400

Power & Hand Tools

US power and hand tool demand will rise 3.1% annually through 2011, supported by product innovations and continued interest in DIY and hobby activities. Power tools will lead gains based on the ongoing popularity of cordless electric products like saws, sanders and polishers. The consumer market will outpace the professional segment. This study analyzes the \$12.3 billion US power and hand tool industry to 2011 and 2016 by product and market. It also details market share and profiles major players.

#2157 02/2007..... \$4500

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