

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



Janitorial Equipment & Supplies

US Industry Study with Forecasts for **2013 & 2018**

Study #2469 | March 2009 | \$4600 | 298 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Environment.....	4
Demographic Trends	9
Population.....	10
Households & Housing Stock	12
Retail Sales Outlook	15
Building Construction Trends	18
Nonresidential.....	19
Residential	22
Construction Stock.....	24
Nonresidential Fixed Investment Outlook	27
Business Formation Trends.....	30
Business Establishment Trends	32
Nonresidential Floor Space Trends.....	35

OVERVIEW

General	38
Supply & Demand.....	39
Pricing	41
Regulatory Trends & Issues.....	44
Indoor Air Quality.....	46
Ergonomics	47
Cross Contamination.....	49
International Market.....	50
Foreign Trade	52
Imports.....	53
Exports	54
Purchasers	55
In-House Cleaners.....	57
Contract Cleaners.....	57

PRODUCTS

General	59
Manual Cleaning Products.....	63
Manual Floor Cleaning Products.....	67
Brushes & Brooms.....	70
Mops & Dusters	73
Other Manual Cleaning Products	78
Sponges & Scrubbing Pads	81
Cleaning Cloths	82
Wipes	83
Squeegees	85
All Other	86
Bags & Containers.....	87
Plastic Refuse Bags & Liners.....	91
Other Bags.....	93

Waste Bins & Trash Containers	95
Metal & Plastic Pails.....	97
Automated Floor Cleaning Equipment.....	98
Vacuum Cleaners.....	102
Types.....	105
Product Design Trends	109
Other Floor & Carpet Cleaners	111
Carpet Cleaning Equipment.....	114
Power Sweepers.....	116
Multipurpose Floor Machines	118
Waxing & Polishing Machines.....	120
Scrubbing & Sanding Machines	123
All Other	126
Other Janitorial Supplies & Accessories	128
Sprayers	131
Floor Machine Pads	131
Power Cleaning Equipment	132
Carts & Tool Holders.....	133
All Other	133
Handles	134
Dust Pans & Mop Wringers.....	135
Miscellaneous Products	
& Accessories.....	135

MARKETS

General	136
Office Buildings	140
Institutional Buildings.....	143
Commercial Buildings	146
Industrial Buildings.....	150
Residential Buildings.....	153
Other Markets.....	156

REGIONS

General	159
Regional Demographic & Economic Trends .	159
Population Patterns.....	160
Economic Outlook.....	161
Nonresidential Floor Space	163
Regional Demand for Janitorial	
Equipment & Supplies.....	165
Northeast	167
New England.....	169
Middle Atlantic.....	170
West	172
East North Central	174
West North Central.....	174
South	175
South Atlantic.....	178

East South Central	180
West South Central	180
West	182
Mountain	184
Pacific	185

INDUSTRY STRUCTURE

General	188
Market Share	191
Automated Floor Cleaning Equipment....	195
Other Janitorial Equipment & Supplies .	198
Manufacturing	200
Product Development.....	201
Marketing	204
Cooperative Agreements.....	205
Distribution	207
Financial Issues	210
Mergers & Acquisitions.....	211

COMPANY PROFILES

BISSELL Homecare.....	215
Carlisle Companies	219
Chapin International	222
Electrolux AB	223
Formosa Plastics	225
Freudenberg & Company.....	226
Hako-Werke International.....	231
Harper Brush Works	235
Heritage Bag.....	237
Home Care Industries.....	238
Illinois Tool Works.....	240
Impact Products	242
IPC Integrated Professional Cleaning.....	245
Jason Incorporated	248
Kaercher (Alfred) GmbH	251
Katy Industries	253
Kimberly-Clark Corporation	255
Libman Company.....	257
Newell Rubbermaid.....	259
Nice-Pak Products	262
NKT Holding.....	264
NSS Enterprises.....	268
Oreck Corporation	270
Pitt Plastics	272
ProTeam Incorporated.....	274
Quickie Manufacturing	275
Shop-Vac Corporation	277
Tacony Corporation.....	279

(continued on next page)

Table of Contents

COMPANY PROFILES

(continued from previous page)

Techtronic Industries	281
Tennant Company.....	284
3M Company	286
Unger Enterprises.....	289
Weiler Corporation	291
Additional Janitorial Equipment & Supply Companies	294

List of Tables/Charts

EXECUTIVE SUMMARY

1 Summary Table.....	3
----------------------	---

MARKET ENVIRONMENT

1 Macroeconomic Environment	8
2 Demographic Indicators.....	10
3 Retail Sales	17
4 Building Construction Expenditures	19
5 Nonresidential Building Construction Expenditures.....	22
6 Residential Building Construction Expenditures.....	24
7 Construction Stock.....	27
8 Nonresidential Fixed Investment Expenditures.....	30
Cht US Business Formations & Dissolutions, 1997-2007.....	32
9 Business Establishments	35
10 Nonresidential Floor Space	37

OVERVIEW

1 Janitorial Equipment & Supplies: Supply & Demand	41
Cht Janitorial Equipment & Supply Pricing, 1998-2018.....	44
2 US Foreign Trade in Janitorial Equipment & Supplies	53
3 Janitorial Equipment & Supply Demand by Purchaser	56
Cht In-House & Contract Cleaner Demand, 1998-2018.....	56

PRODUCTS

1 Janitorial Equipment & Supplies: Supply & Demand	62
Cht Janitorial Equipment & Supply Demand by Type, 2008	63
2 Manual Cleaning Product Supply & Demand	66
3 Manual Floor Cleaning Product Demand.....	69
4 Brush & Broom Demand.....	73
5 Mop & Duster Demand	77
6 Other Manual Cleaning Products Demand	80
7 Bag & Container Supply & Demand	90
8 Automated Floor Cleaning Equipment Supply & Demand	101
9 Vacuum Cleaner Demand	104
10 Other Floor & Carpet Cleaners Demand	113
11 Carpet Cleaning Equipment Demand	116
12 Power Sweeper Demand	118
13 Multipurpose Floor Machine Demand	120
14 Waxing & Polishing Machine Demand	123
15 Scrubbing & Sanding Machine Demand	126
16 All Other Floor Cleaning Equipment Demand.....	127
17 Other Janitorial Supply & Accessory Supply & Demand	130

MARKETS

1 Janitorial Equipment & Supply Demand by Market & Purchaser.....	138
Cht Janitorial Equipment & Supply Demand by Market, 2008	139
Cht In-House & Contract Cleaner Janitorial Equipment & Supply Demand by Market, 2008	139
Cht Additional Janitorial Equipment & Supply Demand Generated by Market - 2013 & 2008.....	140
2 Office Building Demand for Janitorial Equipment & Supplies	143
3 Institutional Building Demand for Janitorial Equipment/Supplies.....	146
4 Commercial Building Demand for Janitorial Equipment/Supplies.....	150

5 Industrial Building Demand for Janitorial Equipment/Supplies.....	153
6 Residential Demand for Janitorial Equipment & Supplies	156
7 Other Markets Demand for Janitorial Equipment & Supplies	158

REGIONS

1 Resident Population by Region	161
2 Regional Gross Domestic Product.....	163
3 Nonresidential Floor Space by Region.....	165
4 Janitorial Equipment & Supply Demand by Region.....	166
Cht Janitorial Equipment & Supply Demand by Region, 2008.....	167
5 Northeast Janitorial Equipment & Supply Demand by Subregion & Market.....	169
6 Midwest Janitorial Equipment & Supply Demand by Subregion & Market.....	173
7 South Janitorial Equipment & Supply Demand by Subregion & Market.....	178
8 West Janitorial Equipment & Supply Demand by Subregion & Market.....	184

INDUSTRY STRUCTURE

1 US Janitorial Equipment & Supply Sales by Company, 2008	189
Cht US Janitorial Equipment & Supply Market Share, 2008.....	192
Cht US Automated Floor Cleaning Equipment Market Share, 2008.....	197
Cht US Janitorial Equipment & Supplies Market Share Excluding Automated Floor Cleaning Equipment, 2008.....	200
2 Selected Cooperative Agreements.....	207
3 Composite Financial Ratios: Selected Janitorial Equipment & Supply Manufacturers	211
4 Selected Acquisitions & Divestitures.....	213

[Click here to purchase online](#)

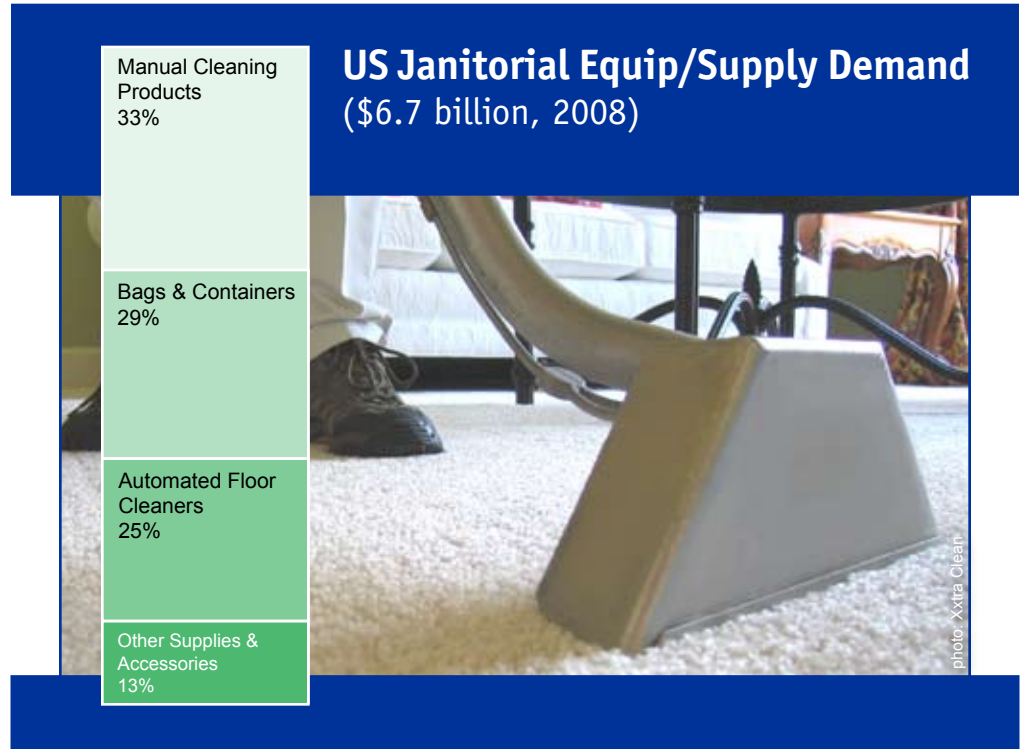
Gains will be supported by new product development activity such as increased focus on better ergonomic equipment design and products that address environmental concerns.

US demand to reach \$7.6 billion in 2013

US demand for janitorial equipment and supplies (excluding chemical products) is forecast to advance 2.4 percent per year to \$7.6 billion in 2013, moderating from stronger growth registered during the 2003 to 2008 period, due almost entirely to an expected deceleration in price increases. Gains will be supported by new product development activity, leading to increased sales of higher-value goods. Innovations will be increasingly focused on better ergonomic equipment design and products that address environmental concerns. Market expansion will also be supported by growing floor space in the institutional building market, a key user of janitorial equipment and supplies.

Manual products to be fastest growing segment

Manual cleaning products are expected to see the fastest gains of any major product segment through 2013. Product innovation will play an important role in manual cleaning product market growth. For instance, wipes will register the strongest growth of any individual product, with increased utilization supported by the development of special-purpose goods. Other individual products expected to post above-average sales gains include backpack vacuums and multipurpose floor machines. These items offer versatility and efficiency. Manufacturers of manual floor cleaning accessories, such as dust pans



and mop wringers, will also benefit from higher manual cleaning product sales.

Institutional buildings to lead market gains

The institutional building market is projected to post the strongest growth of any major market segment through 2013. Advances in this market will be supported by increasing institutional floor space. Furthermore, growing concerns over contamination and air quality in schools and healthcare facilities will bolster janitorial equipment and supply demand in this market. The industrial building market will post the second fastest gains through 2013, driven by an upturn in production following an extend-

ed period of decline, as well as by worker health and safety concerns.

Contract cleaners to outpace in-house buyers

Businesses will increasingly utilize contract cleaners to reduce overhead costs. Janitorial equipment and supplies purchased by contract cleaners are forecast to increase 2.7 percent per annum through 2013, outpacing growth in sales to in-house buyers. While all markets are expected to increasingly use outsourced cleaning services to varying degrees, office buildings will remain the largest market for janitorial equipment and supplies purchased by contract cleaners through 2013.

Copyright 2009 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

PRODUCTS

Automated Floor Cleaning Equipment

The US market for automated floor cleaning equipment will expand 2.0 percent per year through 2013. Growth will not be as strong as either the 2003 to 2008 period, or those expected to occur in the coming period, or those expected to occur in the coming period, or those expected to occur in the coming period. The primary factors limiting growth in nonresidential floor space will be the relatively expensive and long payback period of these products, which are often considered to be capital investments, and when investing slows, sales suffer. In recessionary periods, firms are more likely to make repairs to lengthen the useful life of equipment currently in use, or opt for less expensive new models or purchase manual floor cleaning equipment as less expensive substitutes. Growth will also be limited by moderating increases in US nonresidential floor space and the increasing popularity of hard surface flooring, which is easier to maintain than manual equipment. Furthermore, price increases are not expected to be as robust as they were during the 2003 to 2008 period, which would reduce value gains.

SAMPLE
TEXT

Automated floor cleaning equipment market advances will be driven by product innovation, particularly the introduction of more ergonomic designs, leading to increased sales of more expensive products. Furthermore, demand will be bolstered by stricter building maintenance standards and concerns regarding indoor air quality. The sizable replacement market for these products will also benefit suppliers, as firms that have experienced the increased efficiency and ease-of-use of automated floor cleaning equipment are reluctant to do without this technology.

The automated floor cleaning equipment category is divided into two primary product segments: vacuum cleaners, and other floor and carpet cleaners. The vacuum cleaner segment includes industrial vacuum

TABLE VI-8

WEST JANITORIAL EQUIPMENT SUPPLY & DEMAND BY SUBREGION & MARKET (million dollars)

Item	1998	2003	2008	2013	2018
West Gross Domestic Product (bil \$)	51.0	58.0	65.0	72.0	79.0
\$ janitorial products/000\$ GDP	1.2	1.2	1.2	1.2	1.2
West Nonres Floor Space (bil sq ft)	10.0	10.0	10.0	10.0	10.0
\$ janitorial products/000 sq ft	1.2	1.2	1.2	1.2	1.2
Janitorial Equipment/Supplies Demand	1.2	1.2	1.2	1.2	1.2
By Subregion:					
Mountain					
Pacific					
By Market:					
Office Buildings					
Institutional Buildings					
Commercial Buildings					
Industrial Buildings					
Residential Buildings					
Other					
% West					
US Janitorial Equipment & Supplies	5.1	5.1	5.1	5.1	5.1

SAMPLE
TABLE

CHART VII-2

US AUTOMATED FLOOR CLEANING EQUIPMENT MARKET SHARE, 2007 (\$1.7 billion)

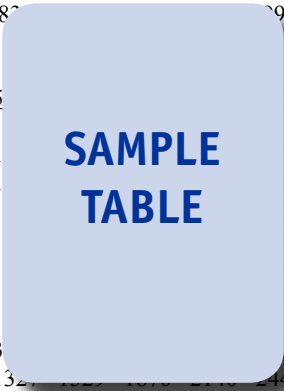


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-1
JANITORIAL EQUIPMENT & SUPPLY DEMAND
BY MARKET & PURCHASER
 (million dollars)

Item	1998	2003	2008	2013	2018
Nonresidential Floor Space (bil sq ft)	80	80	80	80	80
\$ products/000 sq ft				29.5	36
Janitorial Equip & Supplies Demand	5	5	5	70	70
By Market:					
Office Buildings	1	1	1	70	70
Institutional Buildings	1	1	1	30	30
Commercial Buildings				55	55
Industrial Buildings				55	55
Residential Buildings				45	45
Other				45	45
By Purchaser:					
In-House	3	3	3	30	30
Contract Cleaners	13	13	13	40	40



COMPANY PROFILES

Home Care Industries Incorporated

One Lisbon Street
 Clifton, NJ 07013
 973-365-1600
<http://www.hci.com>

Annual Sales
 Employment

Key Products



Home Care Industries Incorporated manufactures vacuum cleaner bags, as well as vacuum cleaners, floor buffers, and micro-filtration products. The Company is 80-percent owned by Harvest Partners Incorporated (New York, New York), a private investment firm.

The Company competes in the US janitorial equipment and supply industry through the manufacture and marketing of vacuum cleaner bags and filter units. Home Care has US manufacturing operations in Clifton, New Jersey; Carpinteria, California; and Oxford, North Carolina. Outside the US, the Company has a plant in Toronto, Ontario, Canada.

Home Care produces a variety of vacuum bags which are available with such features as CLEAN-SEAL closure collars, which feature built-in sliding dust seals to keep dust and dirt inside the bags; MICRO-AIR multi-ply, high-efficiency particulate air secondary and exhaust filters; and SYNTECH paper, which is made using synthetic fibers that are engineered to be four times the length of regular paper fibers. The Company also manufactures MICRO-LINER and QUINTEX vacuum bags. The MICRO-LINER bags are two-ply micro-filtration bags that

“Commercial buildings are a significant market for janitorial equipment and supplies, with sales totaling \$1.2 billion in 2008, which accounted for 17 percent of the overall market. Demand for janitorial equipment and supplies in commercial buildings is expected to reach \$1.3 billion by 2013, growing 2.1 percent per year. Increases will trail both those of the 2003 to 2008 period and the overall janitorial equipment and supply market.”

--Section V, pg. 146-7

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or + 1 440.684.9600

FAX: + 1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional \$2300, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

ORDER FORM

F-WEB.2469

Janitorial Equipment & Supply Demand \$4600

Corporate Use License (add to study price) * + \$2300
Additional Print Copies @ \$500 each *
Total (including selected option) \$

Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

Bill my company American Express MasterCard Visa

Credit Card # Expiration MM YY

Signature

Name

Title

Company

Division

Street (No PO Box please)

City/State/Zip

Country

Phone Fax

Email

* Please check appropriate option and sign below to order an electronic version of the study.

Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature

Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add \$2300; one additional user, add \$500; two additional users, add \$1000; three additional users, add \$1500.

Signature

OTHER STUDIES

Landscape Products

The US market for non-consumable landscape products is analyzed in this study. It presents historical demand data for the years 1998, 2003 and 2008 and forecasts for 2013 and 2018 by landscape product (e.g., hardscaping materials, outdoor structures, decorative), market (residential, nonresidential, nonbuilding), end user (consumer, professional) and US geographical subregion. The study also considers market environment factors, evaluates company market share and profiles industry participants.

#2488 04/2009..... \$4700

Power Lawn & Garden Equipment

This study analyzes the US power lawn and garden equipment industry. It presents historical demand data (1998, 2003, 2008) and forecasts for 2013 and 2018 by product (lawnmowers, turf and grounds equipment, garden tractors, rotary tillers, trimmers and edgers, snow throwers, blowers and vacuums, hedge trimmers), market (residential, professional landscapers, golf courses, government), material and region. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2478 04/2009..... \$4600

Power & Hand Tools

US power and hand tool demand will grow 3.3% annually through 2012. Gains will be driven by continued consumer interest in DIY and home remodeling activities, the ongoing introduction of new products and a recovery in the professional construction market. Power tools will continue to outpace hand tools, especially cordless electric types. This study analyzes the \$12.3 billion US power and hand tool industry, with forecasts for 2012 and 2017 by product and market. It also evaluates market share and profiles industry players.

#2432 12/2008..... \$4700

World Security Equipment

Global demand for security equipment will climb 7.8% annually through 2012. Strongest gains will occur in the underdeveloped markets of Asia, Eastern Europe, Africa/Middle East and Latin America. Electronic security products will post stronger sales advances than mechanical security equipment. This study analyzes the \$62.1 billion world security equipment industry, with forecasts for 2012 and 2017 by product, market, world region and for 28 countries. It also evaluates market share and profiles industry players.

#2343 05/2008..... \$5900

World Power Lawn & Garden Equipment

World power lawn and garden equipment demand will grow 3.2% yearly through 2011. North America and Western Europe will stay the top markets while developing Asian countries grow the fastest. Lawn-mowers will remain the largest segment while turf and grounds equipment lead gains. This study analyzes the \$16 billion world power lawn and garden equipment industry, with forecasts for 2011 and 2016 by product, world region and for 22 nations. It also evaluates market share and profiles major players.

#2246 10/2007..... \$5500

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)



[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)