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# Janitorial Equipment & Supplies

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US Industry Study with Forecasts for **2015 & 2020**

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Study #2770 | August 2011 | \$4900 | 305 pages

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**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](mailto:info@freedoniagroup.com)

[www.freedoniagroup.com](http://www.freedoniagroup.com)

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*Gains will be driven by companies replacing their janitorial products with updated goods designed to improve ergonomics and worker efficiency, and use less water and cleaning solution.*

## US demand to grow 2.2% annually through 2015

US demand for janitorial equipment and supplies (excluding chemical products) is forecast to grow 2.2 percent per year to \$6.7 billion in 2015, representing an improvement over the decline registered between 2005 and 2010. During the 2007-2009 economic recession, many firms delayed purchasing cleaning products, especially higher-cost products such as automated floor cleaning equipment. Gains will be driven by companies replacing their janitorial products with updated goods designed to improve ergonomics and worker efficiency. Heightened interest in sustainable practices will also support market growth, as more companies purchase value-added products developed to use less water and cleaning solution than traditional products. However, even as the economy continues to recover from the recession, demand growth will be limited by the reluctance of companies to reintroduce cleaning and maintenance costs that they cut during the recession.

## Manual cleaning products to grow the fastest

Manual cleaning products are expected to see the fastest gains of any major product segment through 2015. Growth in the number of US business establishments will drive much of this increase in demand, as manual cleaning products are commonly used in nearly all building types. Product development will also aid



market growth. For example, microfiber cloths, which require minimal cleaning chemicals, will support strong sales of cleaning cloths. Other products expected to post above-average gains include wipes, wet mops and squeegees. New versions of these items offer better efficiency and reduced risk of cross-contamination compared to traditional products.

## Institutional buildings to be fastest growing market

The institutional building market is projected to post the fastest growth of any market through 2015. Elevated interest in improving indoor air quality

and minimizing cross-contamination risks, especially in hospitals and other health care settings, will drive demand gains, as janitorial products used in these buildings are replaced by newer versions. For example, mops with reusable microfiber heads reduce the chance of cross-contamination, and automated floor cleaning equipment with advanced filtration systems minimize airborne contaminants. The industrial building market will post the second fastest gains through 2015, driven by the increasing use of automated floor cleaning equipment in efforts to improve the health and safety of building occupants and improve worker efficiency.

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## Sample Text, Table & Chart

### PRODUCTS

#### Sponges & Scrubbing Pads -- The US market for s

scrubbing pads are used to clean a variety of surfaces. The market for sponges and scrubbing pads is expected to grow at a 5 percent rate through 2015. Although the market for sponges and scrubbing pads is expected to grow, it is expected to be restrained by steady competition from lower-cost products. Further sponge and scrubbing pad sales growth will be restrained by competition from such products as cleaning cloths and wipes, which are used in many of the same applications where these products serve as suitable alternatives. Value will also be restrained by steady competition from lower-cost

Sponges are able to absorb large amounts of liquids and have varying degrees of abrasion, and they are used to clean relatively smooth surfaces. Most sponges are constructed of synthetic polymer materials such as polyurethane and polyester, or cellulose, although other types of sponges are not uncommon. Scrubbing and scouring pads are made of plastic or metal fibers. These products are often used to clean tough stains and grit that resist traditional sponges or brushes. They are also useful for cleaning enameled, ceramic or metallic surfaces (e.g., sinks and toilet bowls).

Both sponges and scrubbing pads are available in versions that are impregnated with soap that is activated once wet. Some sponges have anti-odor or anti-microbial pesticides integrated into the product. Although negative media attention to potential health effects of products with such additives has reduced the popularity of these products in recent years. There are also combination sponges and scrubbing pads available to make cleaning more efficient and cost-effective.

Producers of sponges and scrubbing pads continue to develop products with varying degrees of abrasiveness, multi-purpose capabilities, and other features.

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**SAMPLE TEXT**

TABLE V-8

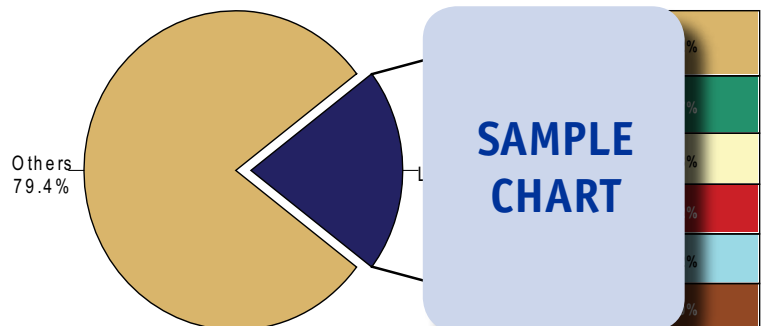
### WEST JANITORIAL EQUIPMENT & SUPPLIES: DEMAND BY SUBREGION & MARKET (million dollars)

Item	2000	2005	2010	2015	2020
West Gross Domestic Product (bil \$)	2,000	2,500	3,000	3,500	4,000
\$ janitorial products/000\$ GDP	0.8	0.8	0.8	0.8	0.8
Nonresidential Floor Space (bil sq ft)	1.0	1.0	1.0	1.0	1.0
\$ janitorial products/000 sq ft	3.0	3.0	3.0	3.0	3.0
West Janitorial Equip/Supplies Demand	2,000	2,500	3,000	3,500	4,000
By Subregion:					
Mountain	0	0	0	0	0
Pacific	0	0	0	0	0
By Market:					
Office	2	2	2	2	2
Institutional	2	2	2	2	2
Commercial	0	0	0	0	0
Industrial	4	4	4	4	4
Residential	5	5	5	5	5
Other	7	7	7	7	7
% West	2.0	2.5	3.0	3.5	4.0
Janitorial Equipment/Supplies Demand	5454	6269	5980	6670	7510

**SAMPLE TABLE**

CHART VI-1

### US JANITORIAL EQUIPMENT & SUPPLY MARKET SHARE (\$6.0 billion, 2010)



**SAMPLE CHART**

## Sample Profile, Table & Forecast

### COMPANY PROFILES

#### Chapin International Incorporated

700 Ellicott Street  
 Batavia, NY 14021  
 585-343-3140  
<http://www.chapinmfg.com>

Annual Sales:  
 Employment:

Key Products:

Chapin International manufactures compressed air sprayers and sprayer/foggers for commercial and household uses. The

The Company is active in the US janitorial equipment and supply industry via the production of commercial and industrial sprayers for a wide range of janitorial, sanitation and other end uses. These units feature hand pumps that compress air inside the tank to dispense cleaning solutions and various other liquids. Specific commercial units made by Chapin include SURESPRAY 1-, 2- and 3-gallon sprayers with the Company's proprietary SURESPRAY anti-clog filters; PREMIER models with SURESPRAY filters, translucent plastic or steel bottles with pressure relief valves, and adjustable brass nozzles; and CLEAN-N-SEAL types that feature funnel top openings. The Company also makes a variety of specialty sprayers, including 48-ounce handheld units and trigger misters. Additionally, Chapin manufactures nozzle assemblies, extension wands, sprayer handles, hoses and repair kits for use with its commercial sprayers.

Among Chapin's industrial sprayers are XTREME types, which feature steel tanks with TRI-POXY linings from Triangle Coatings

TABLE IV-5

### INDUSTRIAL BUILDING DEMAND FOR JANITORIAL EQUIPMENT & SUPPLIES (million dollars)

Item	2000	2005	2010	2015	2020
Industrial Building Space (bil sq ft)					
\$ products/000 sq ft					
Industrial Bldg Janitorial Equip/Supplies					
By Product Type:					
Manual Cleaning Products					
Bags & Containers					
Automated Floor Cleaning Equip					
Other Products & Accessories					
By Purchaser:					
In House					
Contract					
% industrial					
Janitorial Equipment/Supplies Demand	5454	6269	5980	6670	7510

**SAMPLE  
TABLE**

**SAMPLE  
PROFILE**

"Demand for janitorial equipment and supplies in the industrial building market was \$629 million in 2010, accounting for eleven percent of overall demand. Sales in this market are expected to reach \$708 million by 2015, increasing at an above-average growth rate of 2.4 percent per year, albeit from a reduced 2010 base. Industrial buildings include the production facilities of manufacturing, mining and utility companies."

--Section IV, pg. 144



**OTHER STUDIES**

**World Power  
Lawn & Garden Equipment**

World power lawn and garden equipment demand will rise 4.8 percent yearly through 2015. North America and Western Europe will remain dominant markets, with the US alone claiming over 60 percent of new demand. Lawnmowers will remain the top segment, while turf and grounds equipment leads gains. This study analyzes the \$14.9 billion world power lawn and garden equipment industry, with forecasts for 2015 and 2020 by product, market, world region and for 22 countries. The study also evaluates company market share and profiles industry players.

#2797 ..... August 2011 ..... \$6100

**World Security Equipment**

Global security equipment demand will rise 7.4 percent yearly through 2014. China, India, Russia and Turkey will see rapid growth, while North America posts gains well above average from a low 2009 base. Electronic security products will remain dominant and greatly outpace mechanical types. This study analyzes the \$70 billion world security equipment industry, with forecasts for 2014 and 2019 by product, market, world region and for 28 countries. It also evaluates company market share and profiles industry participants.

#2669 ..... December 2010 ..... \$6100

**Wipes**

US wipes demand will rise 4.3 percent annually through 2014. Growth will decelerate from the 2004 to 2009 period, due to maturing markets and a shift toward more environmentally friendly consumer goods and cleaning methods. Disinfectant and electrostatic wipes will be the fastest growing types, and the industrial market will outpace the consumer segment. This study analyzes the \$1.8 billion US wipes industry, with forecasts for 2014 and 2019 by market, substrate and chemical. It also evaluates company market share and profiles industry participants.

#2697 ..... December 2010 ..... \$4900

**Industrial & Institutional  
(I&I) Cleaning Chemicals**

US demand for industrial and institutional (I&I) cleaning chemicals will increase four percent annually through 2014. Disinfectants and sanitizers will be the fastest growing type as the food industry faces tighter safety requirements. General purpose cleaners and floor care cleaners will remain the largest segments. This study analyzes the \$8.8 billion US I&I cleaning chemical industry, with forecasts for 2014 and 2019 by market, product and raw material. It also evaluates company market share and profiles industry players.

#2683 ..... September 2010 ..... \$4900

**Commercial & Residential  
Cleaning Services**

Revenues for contract commercial and residential cleaning services are forecast to advance 4.5 percent yearly through 2013. Exterior building cleaning will be one of the fastest growing services, while interior cleaning remains dominant. Residential and institutional buildings will see the biggest market gains. This study analyzes the \$53.6 billion US commercial and residential cleaning service industry, with forecasts for 2013 and 2018 by service, market and US region. It also evaluates company market share and profiles industry players.

#2581 ..... January 2010 ..... \$4700

**About The Freedonia Group**

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