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Janitorial Equipment & Supplies

US Industry Study with Forecasts for **2017 & 2022**

Study #3086 | September 2013 | \$5100 | 286 pages

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Value gains will be supported by a growing focus on higher value products that are more environmentally friendly and use less water and cleaning solution, as well as on ergonomic products.

US demand to rise 1.7% annually through 2017

US demand for janitorial equipment and supplies (excluding chemical products) is forecast to advance 1.7 percent per year through 2017 to \$7.2 billion. Although not rapid growth, this rate will be an improvement from the more sluggish gains of the 2007-2012 period. Increases will be driven by continuing economic recovery and the corresponding return to more frequent demand for nonessential cleaning activity, as well as expansion in the number of nonresidential establishments and amount of floor space. Growing focus on sustainable practices and environmentally friendly products will drive demand for higher value products that use less water and cleaning solution than comparable products. Ergonomic products will continue to support value growth as well. However, overall gains will be limited to an extent by the reluctance of some companies to reintroduce cleaning and maintenance costs that they cut during the recession.

Manual cleaning products to grow the fastest

Manual cleaning products are forecast to experience some of the fastest growth through 2017, attributable to a more delayed recovery from the effects of the recession, as well as ongoing product development. For instance, sales of products such as wipes, cloths, and flat and wet mops will benefit from the

US Janitorial Equipment & Supplies Demand, 2017 (\$7.2 billion)



continuing adoption of higher value microfiber, which requires minimal use of chemicals and lasts longer than standard products. Sales of multipurpose automated floor cleaning machines will benefit from renewed demand for automated floor cleaning machines, as businesses that delayed replacing or upgrading machinery during the recession will be attracted to the possibility of replacing two or more machines with a single multipurpose product.

Institutional buildings to be fastest growing market

Among markets, institutional buildings will post the fastest gains through 2017.

This market will see the most rapid growth in floor space due to an increase in the number of health care and related establishments. In addition, these locations have a particular interest in higher value products that can reduce the risk of cross-contamination and maintain indoor air quality, such as disposable microfiber flat mops, no-touch cleaning equipment, and automated cleaning products with advanced particle filtration features. The residential market will also see above average gains as homeowners return to more frequent use of contract cleaners who employ these commercial grade products.

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Sample Text, Table & Chart

PRODUCTS

Plastic Refuse Bags & Liners

Demand for plastic refuse bags and liners is projected to reach \$1.5 billion. This rate of growth is the largest share of the total market. It is an improvement over the 2007-2012 period. All economic activity is expected to be of a steady nature of these products also guarantee steady replacement sales.

However, gains will be restrained by the negative environmental profile of plastic bags and liners, as these products typically are not biodegradable and many users replace them before they are full capacity. Along those lines, some customers will seek to limit their environmental impact by replacing refuse bags and liners less frequently. Additionally, there are limited opportunities for differentiation in plastic refuse bags and liners, leading to intense competition that will limit gains in value terms.

However, efforts to address these environmental concerns have provided an avenue for attempting to differentiate products. For example, a growing number of products are being made with recycled plastic content or are being made to be biodegradable, and these versions are being marketed as higher value products. For instance, DM Packaging offers heavy duty can liners made from 60 percent recycled post industrial materials, which are colored lime green to identify their environmentally friendly profile. Manufacturers also continue to create strong, durable products, as well as those that use less material while maintaining the strength of the bag. The heavy use of plastic refuse bags and liners throughout the economy is largely due to the convenience and efficiency of these products. As a result, they are viewed as a

120

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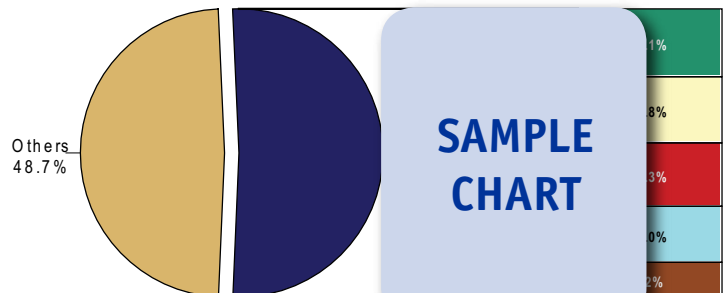
TABLE III-16

BAG & CONTAINER SUPPLY & DEMAND (million dollars)

Item	2002	2007	2012	2017	2022
Business Establishments (000)	70	70	70	70	70
\$ bags & containers/establishment	14	14	14	14	14
Bag & Container Demand	20	20	20	20	20
By Type:					
Plastic Refuse Bags & Liners	5	5	5	5	5
Other Bags	5	5	5	5	5
Waste Bins & Trash Containers	5	5	5	5	5
Metal & Plastic Pails	5	5	5	5	5
By Market:					
Office Buildings	0	0	0	0	0
Institutional Buildings	0	0	0	0	0
Commercial Buildings	0	0	0	0	0
Industrial Buildings	0	0	0	0	0
Residential	0	0	0	0	0
Other	0	0	0	0	0
By Purchaser:					
In-house	0	0	0	0	0
Contract Cleaners	0	0	0	0	0
-imports	0	0	0	0	0
+exports	0	0	0	0	0
Bag & Container Shipments	15	15	15	15	15

CHART V-2

US AUTOMATED FLOOR CLEANING EQUIPMENT MARKET SHARE (\$2.0 billion, 2012)



Sample Profile, Table & Forecast

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

Item	2002	2007	2012	2017	2022
Nonresidential Floor Space (bil sq ft)	85	100	110	115	120
\$ products/000 sq ft	1.0	1.1	1.2	1.3	1.4
Janitorial Equipment/Supplies Demand	0.85	1.10	1.32	1.49	1.68
Office Buildings	0.40	0.50	0.60	0.65	0.70
Institutional Buildings	0.10	0.12	0.14	0.15	0.16
Commercial Buildings	0.20	0.25	0.30	0.32	0.34
Industrial Buildings	0.05	0.06	0.07	0.07	0.08
Residential	0.05	0.06	0.07	0.07	0.08
Other	0.05	0.06	0.07	0.07	0.08

**SAMPLE
TABLE**

COMPANY PROFILES

Shop-Vac Corporation
 2323 Reach Road
 Williamsport, PA 17701
 570-326-0502
<http://www.shopvac.com>

Annual Sales:
 Employment:

Key Products: vacuum cleaners, replacement parts, and accessories

**SAMPLE
PROFILE**

Shop-Vac is a privately held manufacturer of heavy duty vacuum machines for industrial, commercial, and household applications. The Company also manufactures a wide range of accessories designed for sanitary maintenance.

Shop-Vac is active in the US janitorial equipment and supplies industry via the production of wet/dry vacuum cleaners, which are sold under the SHOP-VAC brand name. These units include such types as HANGUP, ALLAROUND, BULLDOG, QUIET, and specialty. SHOP-VAC vacuums are suitable for use in such environments as construction sites; wood shops; warehouses; manufacturing facilities; residential garages, basements, and kitchens; and other areas where wet and dry waste are present. Shop-Vac also produces filters, replacement parts, and accessories for use with its vacuums. Additional products from the Company include air movers and mop buckets.

HANGUP vacuums feature 5 gallon tanks and mounting brackets to install the unit behind machinery or above workbenches. The product line ALLAROUND comprises general purpose vacuums with 2-, 2-1/2-, or 4-1/2-gallon tanks. Shop-Vac manufactures BULLDOG

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**STUDY
COVERAGE**

This Freedonia study, *Janitorial Equipment & Supplies*, presents historical data (2002, 2007, 2012) plus forecasts (2017 and 2022) for demand by product and market. The study also assesses market environment factors, examines the industry structure, evaluates company market share and profiles 29 participants in the US industry.

OTHER STUDIES

Consumer Water Treatment Systems in China

Demand for consumer water treatment systems in China will grow 17.0 percent yearly to 26.2 billion yuan in 2017. Point-of-use systems will remain the dominant product, while point-of-entry systems will grow the fastest. Membrane separation will remain the key technology. This study analyzes the 12 billion yuan consumer water treatment system industry in China, with forecasts for 2017 and 2022 by product, aftermarket component, technology and regional market. The study also evaluates company market share and profiles industry participants.

#3168 August 2014 \$5300

World Consumer Water Treatment Systems

World demand for consumer water treatment systems will jump 12.4% annually, led by the BRIC (Brazil, Russia, India, China) and other countries with poor public treatment infrastructure. Gains will be driven by rising incomes and increasing awareness of water contamination. This study analyzes the \$7.5 billion world consumer water treatment system industry, with forecasts for 2017 and 2022 by type, aftermarket component, technology, world region, and for 21 countries. The study also evaluates company market share and profiles industry participants.

#3110 January 2014 \$6100

World Enzymes

World enzyme demand is forecast to increase 6.3 percent per year to nearly \$7 billion in 2017. Rising per capita incomes in large countries such as China and India will support consumer demand for higher value goods, such as detergents and food products. Advances in biotechnology will drive strong gains in specialty enzyme demand. This study analyzes the \$5.1 billion world enzyme industry, with forecasts for 2017 and 2022 by market, product, world region, and for 16 countries. The study also evaluates company market share and profiles industry players.

#3104 January 2014 \$6300

Disinfectant & Antimicrobial Chemicals

Demand for disinfectant and antimicrobial chemicals in the US is forecast to rise 6.1 percent annually to \$1.6 billion in 2017. Organosulfur compounds will see significant growth as antimicrobial agents in products such as water-based architectural paint, floor coverings, home textiles, and other construction materials. This study analyzes the \$1.2 billion US disinfectant and antimicrobial chemical industry, with forecasts for 2017 and 2022 by market, function, and product. The study also evaluates company market share and profiles industry players.

#3043 June 2013 \$4900

Home Organization Products

US demand for home organization products will increase 4.0 percent per year to \$9.4 billion in 2017. Modular units will be the fastest growing product type and will surpass shelving as the second largest segment. Organization products used in garages and closets will be the fastest growing types by room. This study analyzes the \$7.7 billion US home organization product industry, with forecasts for 2017 and 2022 by material, product, room, and market. The study also evaluates company market share and profiles industry players.

#3027 May 2013 \$5100

About The Freedonia Group

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