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# Janitorial Equipment & Supplies

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US Industry Study with Forecasts for **2019 & 2024**

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*Growth will be driven by an accelerating economy, more business establishments, and by significant pent-up demand for automated floor cleaning equipment.*

## US demand to rise 2.2% annually through 2019

US demand for janitorial equipment and supplies is forecast to increase 2.2 percent per year through 2019 to \$7.1 billion, continuing the recovery that began in the latter part of the 2009-2014 period. Significant pent-up demand for automated floor cleaning equipment will drive advances. After initially falling in 2008 and 2009, sales of most types of automated floor cleaning equipment have only recently returned to more substantial growth. Sales in this category remained below pre-recession highs as of 2014, but will again approach or exceed those levels by 2019.

In general, gains for janitorial equipment and supplies will be driven by accelerating economic growth -- which will increase activity in buildings and boost daily cleaning requirements -- and by factors such as a rising number of business establishments and gains in nonresidential floor space. Improved economic conditions will also support a return to increased levels of cleaning (e.g., more frequent changing of waste can liners) and greater sales of related products. Heightened interest in sustainable and environmentally friendly cleaning practices will buoy demand for products that limit water or chemical consumption. Concerns about the risk of cross-contamination and employee injury will drive sales of products with advanced features and improved ergonomic designs. Sales will be further fueled by rising interest in replacing older, noisy

## US Janitorial Equipment & Supplies Demand, 2019

(\$7.1 billion)



Manual Cleaning Products

Bags & Containers

Automated Floor Cleaning Equipment

Other Supplies & Accessories

equipment with quieter products appropriate for use in increasingly popular daytime cleaning applications or in noise-sensitive environments.

## Automated floor cleaning equipment to lead gains

Automated floor cleaning equipment is forecast to post the fastest and largest gains as the segment continues to recover from its extended downturn. Sales of specialty items and those used on hard surface floors will particularly benefit as janitorial budgets expand. Most other types of janitorial equipment and supplies are lower-cost and sometimes disposable items that saw recoveries earlier in the 2009-2014 period, so

gains going forward will lag those of automated floor cleaning equipment.

## Institutions, office buildings to pace markets

Institutional and office buildings will record the fastest market gains through 2019. The institutional market will be driven by growth in institutional floor space and in the number of healthcare establishments. Elevated sanitary standards in these establishments will further support demand for higher-value janitorial products. The office building market will primarily be driven by ongoing changes in cleanliness standards, more daytime cleaning, and the rebound in automated floor cleaning equipment.

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## Sample Text, Table & Chart

### PRODUCTS

#### Manual Floor Cleaning Products

In 2014, manual floor cleaning products comprised 17% of the US janitorial equipment and supplies market, equivalent to \$1.1 billion. Unlike some other major product segments, manual floor cleaning products overall proved more sensitive to recessionary trends, with significant declines between 2008 and 2009 and thereafter a protracted period of recovery through 2014. Nevertheless, demand is not reflected across all product subcategories. For example, brushes and brooms bottomed out in 2009 and subsequently experienced slow growth for most of the 2009-2014 period.

Demand for manual floor cleaning products is expected to reach \$1.2 billion, primarily driven by demand for brushes and dusters, which are expected to see strong demand. While brooms and brushes and brooms experienced protracted declines as a whole over the 2009-2014 period, demand for brushes and brooms performed by in-house and contract staffs. While demand for brushes and brooms declined with the reduction in overall cleaning levels, demand for brushes and brooms remains relatively low cost and the constant need for at least basic levels of cleaning in most buildings supported demand to an extent.

Through 2019, demand will benefit from a continuing emphasis on more durable, sanitary, or environmentally friendly products, as well as on more ergonomic design. These trends will support demand levels and will provide a higher-value alternative to imports. Nevertheless, over the short term manual floor cleaning products will face strong competition from automated floor cleaning equipment as the economy continues to recover and cleaners return to a regular schedule of replacing or upgrading these automated products.

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SAMPLE TEXT

TABLE III-7

BAG & CONTAINER SUPPLY & DEMAND  
(million dollars)

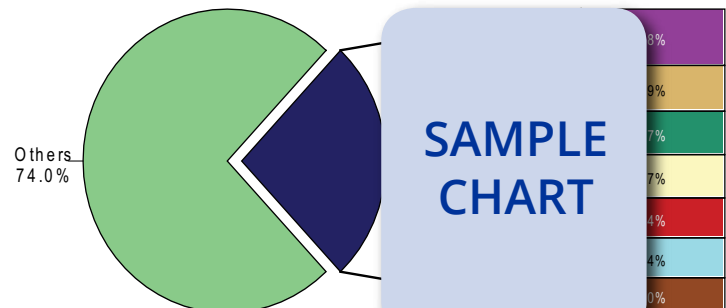
Item	2004	2009	2014	2019	2024
Business Establishments (000)	700	700	700	700	700
\$ bags & containers/establishment					
Bag & Container Demand					
By Type:					
Plastic Refuse Bags & Liners					
Other Bags					
Waste Bins & Trash Containers					
Metal & Plastic Pails					
By Market:					
Office Buildings					
Institutional Buildings					
Commercial Buildings					
Industrial Buildings					
Residential					
Other					
By Purchaser:					
In-House					
Contract Cleaners					
- imports					
+ exports					
Bag & Container Shipments	1504	1504	1497	1500	1500

SAMPLE TABLE

Source: The Freedonia Group, Inc.

CHART V-1

US JANITORIAL EQUIPMENT & SUPPLIES MARKET SHARE, 2014  
(\$6.4 billion)



SAMPLE CHART

## Sample Profile & Table, & Study Coverage

### COMPANY PROFILES

#### Kimberly-Clark Corporation

351 Phelps Drive  
 Irving, TX 75038  
 972-281-1200  
<http://www.kimberly-clark.com>

Sales: \$1.7 billion (2014)  
 North America (2014)  
 Employees: 114,000 (2014)  
 Key Products: Paper products, healthcare, aviation, industrial

Kimberly-Clark Corporation is in the worldwide manufacture and marketing of a wide range of products for personal, business, and industrial uses. The Company operates in four continuing segments: Personal Care, Consumer Tissue, K-C Professional, and Corporate and Other. In November 2014, Kimberly-Clark completed the spin-off of a former fifth segment, Health Care, into a new, publicly traded company that operates as Halyard Health Incorporated (Alpharetta, Georgia), and has annual sales of approximately \$1.7 billion.

The Company is active in the US janitorial equipment and supplies industry via the K-C Professional segment, which generated 2014 sales of \$3.4 billion. The segment, which operates as the K-C Professional business unit (Roswell, Georgia), manufactures wipes, facial and bathroom tissue, paper towels, napkins, soaps, sanitizers, and safety products for household and away-from-home applications. For the janitorial equipment and supplies industry, K-C Professional makes a range of wipes intended for cleanroom, laboratory, healthcare, aviation, industrial, foodservice, and other end uses. These products, which are marketed under the KIMTECH and WYPALL brand names, are made using such materials as the unit's HYDROKNIT fast-absorbing, cloth-

**SAMPLE PROFILE**

TABLE IV-2

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

Item	2004	2009	2014	2019	2024
Office Building Space (bil sq ft)					
\$ products/000 sq ft					
Office Building Equip/Supplies Demand					
By Product Type:					
Manual Cleaning Products					
Bags & Containers					
Automated Floor Cleaning Equipment					
Other Products & Accessories					
By Purchaser:					
In-House					
Contract Cleaners					
% office buildings					
Janitorial Equipment & Supplies Demand	59.15	57.79	64.15	71.55	77.70

**SAMPLE TABLE**

Source: The Freedonia Group, Inc.

### STUDY COVERAGE

This Freedonia study, *Janitorial Equipment & Supplies*, presents historical demand data (2004, 2009, 2014) and forecasts (2019, 2024) by product and market. The study also considers market environment factors, assesses the industry structure, evaluates company market share and profiles 29 US industry competitors.

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## Related Studies

### World Consumer Air Treatment Systems

This study analyzes the global market for consumer air treatment systems. It presents historical data (2004, 2009, and 2014) and forecasts (2019 and 2024) by product type (whole-house, portable), technology (e.g., conventional filtration, electrostatic, ionization), world region and major country. Demand for replacement air filters is also included. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3343.....October 2015.....\$6400

### World Consumer Water Treatment Systems

This study analyzes the world consumer water treatment system industry. It presents historical demand data (2004, 2009 and 2014) and forecasts (2019 and 2024) by type (point-of-entry, point-of-use), aftermarket component, technology (e.g., conventional filtration, membrane separation), world region, and major country. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#3341.....October 2015.....\$6300

### Consumer Water & Air Treatment Systems

US demand for consumer water and air treatment systems will rise 5.5 percent annually to \$2.3 billion in 2019. Whole-house systems will be the fastest growing within both the air and water treatment segments. Among consumables, salt will offer the best growth opportunities, followed by water filters and membranes. This study analyzes the \$1.8 billion US consumer market for water and air treatment systems, with forecasts for 2019 and 2024 by technology, product, and US region. The study also evaluates company market share and profiles industry players.

#3281.....July 2015.....\$5500

### Home Organization Products

Demand for home organization products in the US is forecast to increase 3.5 percent per year through 2019 to \$10.5 billion. Bins, baskets and totes will remain the largest product segment, while modular units will grow the fastest. Garages will be the fastest growing room in which organization products are used. This study analyzes the \$8.8 billion US home organization product industry, with forecasts for 2019 and 2024 by material, product, room and market. The study also evaluates company market share, and profiles industry competitors.

#3254.....May 2015.....\$5300

### World Industrial & Institutional (I&I) Cleaning Chemicals

Global demand for I&I cleaning chemicals is projected to increase 4.3 percent per year to \$46.3 billion in 2018. The fastest growth will occur in healthcare, due to a rise in the number of hospital stays and concerns about healthcare-associated infections (HAIs). China and the Asia/Pacific region will be the fastest growing markets. This study analyzes the \$37.5 billion world I&I cleaning chemical industry, with forecasts for 2018 and 2023 by product, market, world region, and for 18 countries. The study also evaluates company market share and profiles industry participants.

#3207.....November 2014.....\$6300

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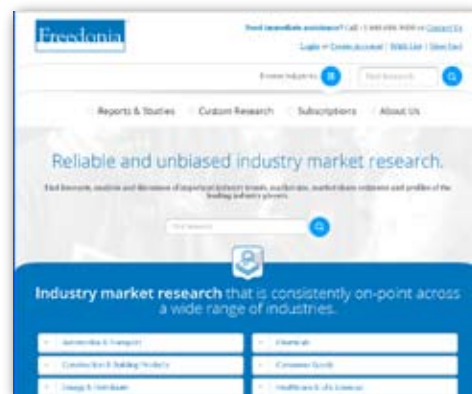
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