Janitorial Equipment & Supplies

US Industry Study with Forecasts for 2015 & 2020

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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.
Sponges & Scrubbing Pads -- The US market for sponges and scrubbing pads is forecast to increase 2.5 percent per year to $335 million in 2015. The expected growth rate reflects an improvement over the decline in demand experienced between 2005 and 2010. Although sponges and scrubbing pads are commodity products, sales remain strong because they must be replaced frequently, are relatively inexpensive, and lack competitive alternatives for certain applications. Further sponge and scrubbing pad sales growth will be restrained by competition from such products as cleaning cloths and wipes. In applications where these products serve as suitable alternatives, value gains will also be restrained by steady competition from lower-cost imports.

Sponges are able to absorb large amounts of liquids and are used to clean relatively small surfaces. Most sponges are constructed of synthetic polymers, including polyurethane and polyester, or cellulose, although other types of natural sponges are not uncommon. Scrubbing and scouring pads are generally 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 capability, and upgraded performance, including moisture retention and color-fastness. The market has been experiencing healthy growth, with over 15.0 percent per year from 2005 to 2010.

### TABLE V-8

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**Sample Profile, Table & Forecast**

**COMPANY PROFILES**

Chapin International Incorporated  
700 Ellicott Street  
Batavia, NY 14021  
585-343-3140  
http://www.chapinmfg.com

Annual Sales: over $50 million (estimated)  
Employment: 235 (estimated)  
Key Products: sprayers and sprayer/foamers

Chapin International Incorporated is a manufacturer of compressed air sprayers and sprayer/foamers for a range of industrial, commercial and household uses. 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.

The Company includes a range of sprayers and sprayer/foamers featuring 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. Additionally, Chapin manufactures nozzle assemblies, extension wants, 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**

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<td>6269</td>
<td>5980</td>
<td>6670</td>
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</table>

“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
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