
**SANITARY
MAINTENANCE**



**REPORT ON 2010
SANITARY SUPPLY
DISTRIBUTOR SALES**

Results of a joint research study
conducted by *Sanitary Maintenance* Magazine
and the ISSA - the leading association
for the cleaning industry worldwide
September 2011

Cost: \$199

ABOUT THE STUDY

This study was designed, prepared and conducted by the Research Department of Trade Press Media Group Inc., publisher of *Sanitary Maintenance* Magazine in conjunction with ISSA. Its primary purpose was to gather information on distributor sales of chemicals, janitorial supplies, paper/plastic products and power equipment. Data shown in this report was derived from non-duplicated questionnaires returned from a random sample of *Sanitary Maintenance* readers which includes ISSA members. Projected market totals were computed using weighted means. Dollar figures presented represent sales by distributors after markup. Estimates for manufacturer sales based on these figures are difficult to make since markup varies from category to category and from one distributor to another.

The data contained within this report is believed to be reflective of the janitorial supply distribution industry and does not reflect size of each market segment or product group beyond that.

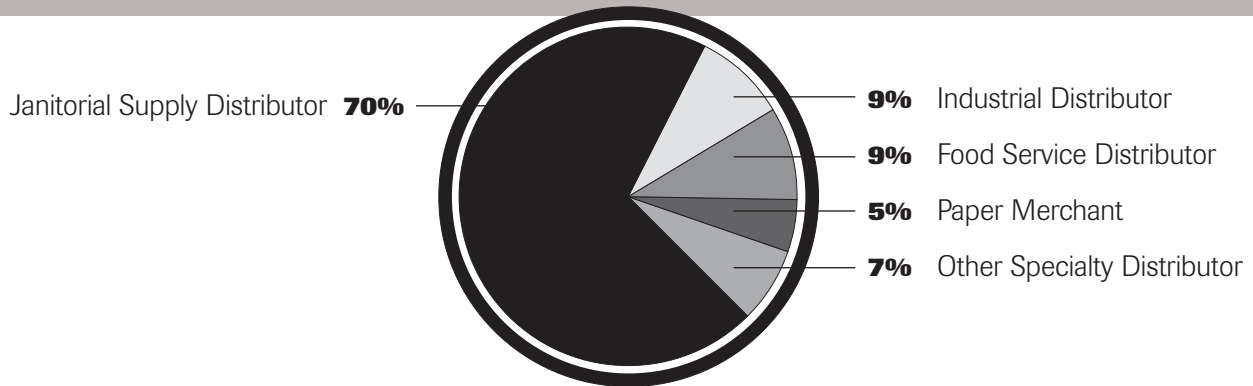
SOME HIGHLIGHTS FROM THIS SURVEY

- Distributor sales grew 2.0% from 2008 to 2010. Sales now total \$23.6 billion.
- More than one-third of distributors sell locally (within a 60 mile radius).
- Industrial, Educational, and Contract Cleaners accounted for 45.8% of distributor sales in 2010.
- Paper and plastics is the leading product category by sales volume; garnering more than 50% of total sales.
- Towels/Facial Tissue/Toilet Tissue continues to be the product that sold the most by dollar volume.

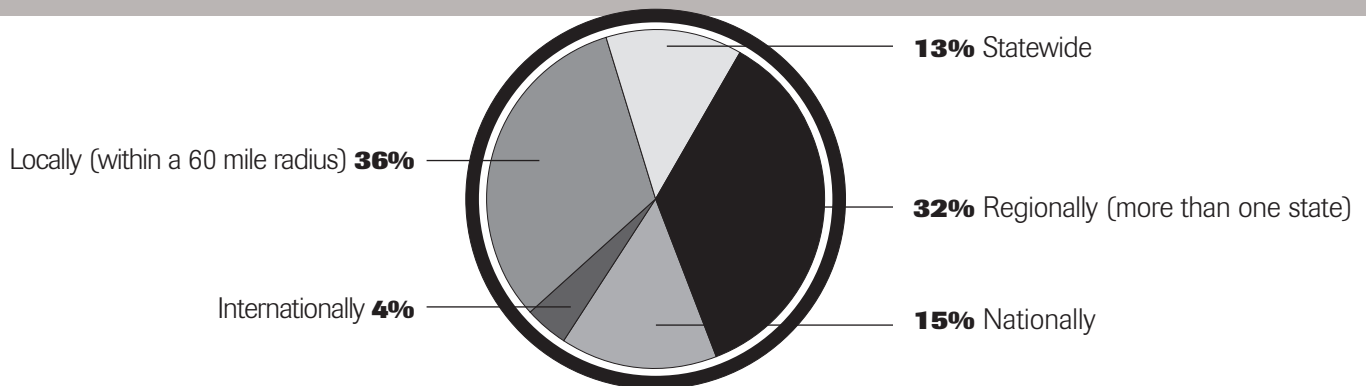
SURVEY RESULTS

RESPONDENTS' PROFILE

TYPE OF DISTRIBUTOR



DISTRIBUTORS' SALES TERRITORY



DISTRIBUTOR SALES

2010 DISTRIBUTOR SALES VOLUME

Product Category	Sales	Percentage of Total
Paper/Plastics	\$11,910,436,000	50.4%
Chemicals	\$7,106,555,000	30.0%
Supplies/Accessories	\$2,203,941,000	9.3%
Power Equipment	\$1,866,885,000	7.9%
Other Janitorial Products	\$555,863,000	2.4%
TOTAL SALES	\$23,643,680,000	

2010 DISTRIBUTOR SALES BY MARKET SEGMENT

Market Segments	Sales	Percentage of Total
Contract Cleaners	\$3,664,770,400	15.5%
Industrial (manufacturing plants/food processing/utilities warehouses)	\$3,617,483,040	15.3%
Educational (schools/colleges/universities)	\$3,546,552,000	15.0%
Health Care (hospitals/nursing homes/clinics/medical/dental offices)	\$3,144,609,440	13.3%
Commercial (office buildings/property management firms)	\$1,962,425,440	8.3%
Governmental (municipal/county/state/federal)	\$1,655,057,600	7.0%
Retail (grocery/shopping malls/department stores/auto dealers/misc. retail)	\$1,347,689,760	5.7%
Restaurants/Clubs (stand-alone/country clubs)	\$1,205,827,680	5.1%
Hotels/Motels	\$1,111,252,960	4.7%
Recreation (stadiums, health clubs, movie theaters, casinos, bowling alleys)	\$851,172,480	3.6%
Religious (churches, convents/etc., EXCLUDING hospitals & schools)	\$662,023,040	2.8%
Transportation (airports/public transit/airlines/bus and rail stations)	\$567,448,320	2.4%
Residential (apartment buildings/condominiums)	\$307,367,840	1.3%
Total	\$23,643,680,000	

BREAKDOWN OF 2010 PRODUCT SALES

2010 CHEMICAL SALES

Products	Projected Sales	Percentage of Total
Bio Enzymes (drain opener/drain cleaner/etc.)	\$390,579,000	5.5%
Carpet Care Chemicals (shampoos/pretreats/spotters/etc.)	\$393,954,000	5.6%
Cleaners & Degreasers (glass/wall)	\$1,263,261,000	17.8%
Disinfectants & Sanitizers (bowl/porcelain cleaners/etc.)	\$655,759,000	9.2%
Hand Cleaners (bar/liquid/powder/etc.)	\$625,146,000	8.8%
Hand Sanitizers	\$350,910,000	4.9%
Ice Melts	\$321,343,000	4.5%
Insecticides, Herbicides & Pesticides	\$37,645,000	0.5%
Laundry Detergents	\$403,976,000	5.7%
Odor Control (blocks/liquids/gels)	\$335,654,000	4.7%
Resilient & Hard Floor Chemicals (stripper/neutralizers/seals/finishers/restorers/spray buffs/etc.)	\$1,684,659,000	23.7%
Warewash Chemicals	\$454,295,000	6.4%
Other Chemicals not listed above	\$189,374,000	2.7%
Total	\$7,106,555,000	

Green products accounted for 23% of chemical sales in 2010.

2010 POWER EQUIPMENT SALES

Products	Sales	Percentage of Total
Automatic Scrubbers	\$394,562,000	21.1%
Battery Powered Floor Machines (polishers/burnishers)	\$109,410,000	5.9%
Carpet Extractors	\$202,970,000	10.9%
Electric (Corded) Powered Floor Machines (polishers/burnishers)	\$207,244,000	11.1%
Pressure Washers	\$39,920,000	2.1%
Propane Powered Floor Machines	\$47,989,000	2.6%
Power Sweepers	\$41,483,000	2.2%
Replacement Parts	\$258,156,000	13.8%
Restroom Cleaning Machines (not including pressure washers)	\$53,089,000	2.9%
Vacuums (backpack)	\$86,419,000	4.6%
Vacuums (tank and wet/dry)	\$101,379,000	5.4%
Vacuums (upright/wide area)	\$261,333,000	14.0%
Other Power Equipment not listed above	\$62,931,000	3.4%
Total	\$1,866,885,000	

Green products accounted for 26% of power equipment sales in 2010.

2010 SUPPLIES/ACCESSORIES SALES

Products	Sales	Percentage of Total
Absorbents/Spill Containment	\$34,548,000	1.6%
Brooms & Brushes	\$125,616,000	5.7%
Cloth rags (not microfiber)	\$78,331,000	3.6
Dusters & Dust Mops, & Applicator Pads	\$113,338,000	5.1%
Floor Pads	\$197,657,000	9.0%
Floor Machine Brushes	\$24,525,000	1.1%
Gloves (light weight/disposable & safety)	\$293,620,000	13.3%
Hand Tools (scrapers/screwdrivers/pliers/hammers/flashlights)	\$57,137,000	2.6%
Mats & Matting	\$239,608,000	10.9%
Microfiber Products (mops, clothes, etc.)	\$166,998,000	7.6%
Mopping Equipment	\$156,123,000	7.1%
Protective Clothing/Equipment	\$46,376,000	2.1%
Safety Products (other than gloves)	\$68,008,000	3.1%
Signage/Barricades	\$26,734,000	1.2%
Squeegees	\$26,187,000	1.2%
Traditional Washroom Fixtures (non touch-free hand dryers, dispensers, toilet partitions)	\$68,935,000	3.1%
Touch-Free Washroom Fixtures (hand dryers, dispensers, flush valves)	\$54,346,000	2.5%
Warewashing Equipment	\$38,629,000	1.7%
Waste Handling Equipment (carts/receptacles, NOT liners)	\$84,195,000	3.8%
Wet Mops (all types, except microfiber)	\$187,852,000	8.5%
Window Washing Accessories (buckets/holsters/etc., NOT squeegees)	\$43,720,000	2.0%
Other Supplies/Accessories not listed above	\$71,458,000	3.2%
Total	\$2,203,941,000	

Green products accounted for 23% of supplies/accessories sales in 2010.

2010 PAPER/PLASTIC SALES

Products	Sales	Percentage of Total
Foodservice Disposables (napkins/plates/bowls/cups/cutlery/wraps)	\$1,445,201,000	12.1%
Industrial Wipers	\$349,265,000	2.9%
Liners & Bags (paper or synthetic/plastic)	\$2,553,098,000	21.4%
Packaging Products	\$1,541,204,000	13.0%
Towels/Facial Tissue/Toilet Tissue	\$5,832,641,000	49.0%
Other Paper/Plastics not listed above	\$189,027,000	1.6%
Total	\$11,910,436,000	

Green products accounted for 37% of paper/plastic sales in 2010.

2010 OTHER JANITORIAL PRODUCT SALES NOT LISTED IN ANY PREVIOUS CATEGORY

Sales	Percentage of Total
\$555,863,000	2.4%

ADDITIONAL SALES INFORMATION

2010 AVERAGE GROSS MARGIN

Chemicals	38%
Supplies/Accessories	29%
Paper/Plastics	28%
Power Equipment	22%
Miscellaneous Products	31%

AVERAGE NUMBER OF SALESPeOPLE EMPLOYED

Outside Salespeople	15
Inside Salespeople	5

