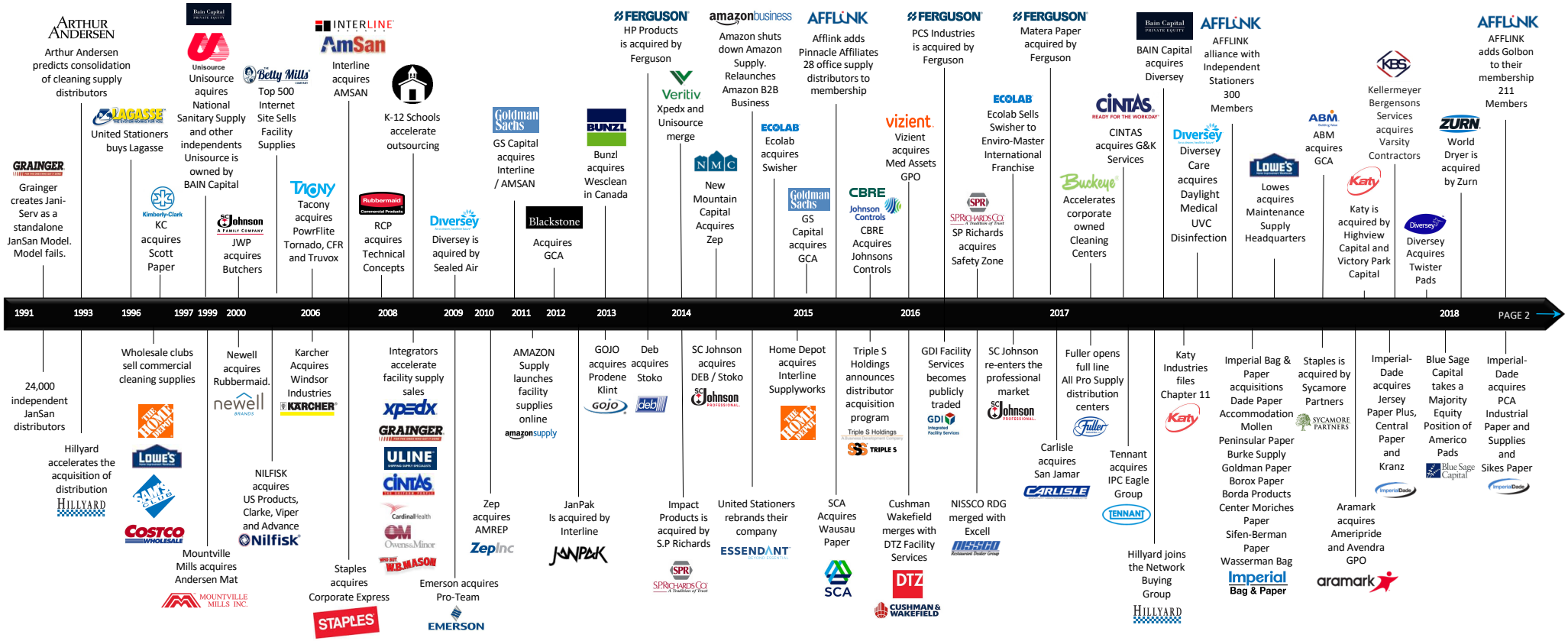
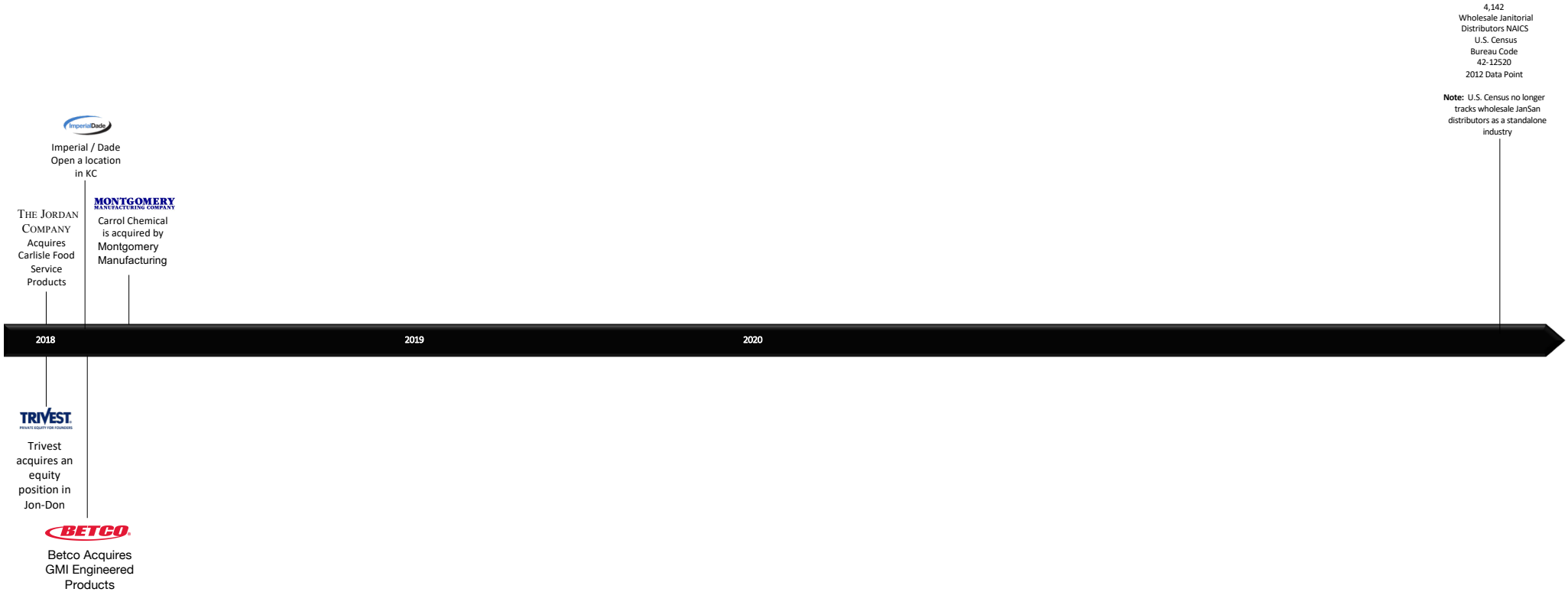

1991
Grainger creates Jani-Serv as a standalone JanSan Model. Model fails.
24,000 independent JanSan distributors
1993
Arthur Andersen predicts consolidation of cleaning supply distributors
United Stationers buys Lagasse
Hillyard accelerates the acquisition of distribution
1996
KC acquires Scott Paper
Wholesale clubs sell commercial cleaning supplies
1997
1999
Unisource aquires National Sanitary Supply and other independents Unisource is owned by BAIN Capital
Mountville Mills acquires Andersen Mat
2000
Top 500 Internet Site Sells Facility Supplies
JWP acquires Butchers
Newell acquires Rubbermaid.
NILFISK acquires US Products, Clarke, Viper and Advance
2006
Tacony acquires PowrFlite Tornado, CFR and Truvox
Karcher Acquires Windsor Industries
2008
K-12 Schools accelerate outsourcing
RCP acquires Technical Concepts
Integrators accelerate facility supply sales
Staples acquires Corporate Express
2009
Diversey is aquired by Sealed Air
Emerson acquires Pro-Team
2010
Zep acquires AMREP
2011
GS Capital acquires Interline / AMSAN
AMAZON Supply launches facility supplies online
2012
Acquires GCA
JanPak Is acquired by Interline
2013
Bunzl acquires Wesclean in Canada
GOJO acquires Prodene Klint
2014
HP Products is acquired by Ferguson
Veritiv Xpedx and Unisource merge
New Mountain Capital Acquires Zep
Deb acquires Stoko
Impact Products is acquired by S.P Richards
SC Johnson acquires DEB / Stoko
2015
Amazon shuts down Amazon Supply. Relaunches Amazon B2B Business
Ecolab acquires Swisher
GS Capital acquires GCA
Home Depot acquires Interline Supplyworks
United Stationers rebrands their company
2016
Afflink adds Pinnacle Affiliates 28 office supply distributors to membership
Vizient acquires Med Assets GPO
CBRE Acquires Johnsons Controls
Triple S Holdings announces distributor acquisition program
SCA Acquires Wausau Paper
Cushman Wakefield merges with DTZ Facility Services
PCS Industries is acquired by Ferguson
GDI Facility Services becomes publicly traded
NISSCO RDG merged with Excell
2017
Matera Paper acquired by Ferguson
Ecolab Sells Swisher to Enviro-Master International Franchise
SC Johnson re-enters the professional market
Carlisle acquires San Jamar
Accelerates corporate owned Cleaning Centers
CINTAS acquires G&K Services
Fuller opens full line All Pro Supply distribution centers
Tennant acquires IPC Eagle Group
Hillyard joins the Network Buying Group
BAIN Capital acquires Diversey
Katy Industries files Chapter 11
AFFLINK alliance with Independent Stationers 300 Members
Diversey Care acquires Daylight Medical UVC Disinfection
Lowes acquires Maintenance Supply Headquarters
Imperial Bag & Paper acquisitions Dade Paper Accommodation Mollen Peninsular Paper Burke Supply Goldman Paper Borox Paper Borda Products Center Moriches Paper Sifen-Berman Paper Wasserman Bag
2018
ABM acquires GCA
Staples is acquired by Sycamore Partners
Aramark acquires Ameripride and Avendra GPO
Kellermeyer Bergensons Services acquires Varsity Contractors
Katy is acquired by Highview Capital and Victory Park Capital
Imperial-Dade acquires Jersey Paper Plus, Central Paper and Kranz
Diversey Acquires Twister Pads
Blue Sage Capital takes a Majority Equity Position of Americo Pads
World Dryer is acquired by Zurn
AFFLINK adds Golbon to their membership 211 Members
Imperial-Dade acquires PCA Industrial Paper and Supplies and Sikes Paper
PAGE 2


4,142
Wholesale Janitorial
Distributors NAICS
U.S. Census
Bureau Code
42-12520
2012 Data Point
Note: U.S. Census no longer tracks wholesale JanSan distributors as a standalone industry
Imperial / Dade
Open a location
in KC
THE JORDAN COMPANY
Acquires
Carlisle Food
Service
Products
MONTGOMERY MANUFACTURING COMPANY
Carrol Chemical
is acquired by
Montgomery
Manufacturing
2018
2019
2020
TRIVEST
PRIVATE EQUITY FOR FOUNDERS
Trivest
acquires an
equity
position in
Jon-Don
BETCO
Betco Acquires
GMI Engineered
Products

Timeline Conclusions

1. Customers are more sophisticated and they are demanding a better customer experience.
2. Financial managers are driving cost from the custodial operations.
3. National account business is increasing, and street business is decreasing.
4. Outsourcing of non-traditional users is increasing.
5. Government GPOs and purchasing cooperatives are pursuing K-12, state and federal purchasing contracts.
6. Traditional user Group Purchasing Organizations (GPO) are crossing over into other market verticals.
7. Modern buyers are demanding their B2C shopping experience from their B2B suppliers.
8. B2B digitally enabled sales portals are delivering training, troubleshooting, product specifications, and pricing to the user.
9. 75% of the transactional sales force will be replaced by B2B digitally enabled sales model.
10. Integrators are applying supply chain optimization metrics to the JanSan market.
11. The leading venture capital firms, private equity firms and large corporations are investing in manufacturers, distributors and building service contractors.
12. User buying trends are forcing manufacturers to explore alternative distribution channels to serve customers and sustain their brands as the commercial cleaning industry matures.
13. Cleaning is no longer a standalone industry.