

1991 ARTHUR ANDERSEN predicts consolidation of cleaning supply distributors

1993 United Stationers buys Lagasse

1996 Grainger creates Jani-Serv as a standalone JanSan Model. Model fails.

1997 Bain Capital Private Equity Unisource acquires National Sanitary Supply and other independents. Unisource is owned by BAIN Capital.

1999 Betty Mills Top 500 Internet Site Sells Facility Supplies

2000 Kimberly-Clark KC acquires Scott Paper

2006 Interline acquires AMSAN

2008 K-12 Schools accelerate outsourcing

2009 RCP acquires Technical Concepts

2010 Tacony acquires PowrFlite Tornado, CFR and Truvox

2011 GS Capital acquires Interline / AMSAN

2012 Blackstone Acquires GCA

2013 Bunzl acquires Wesclean in Canada

2014 HP Products is acquired by Ferguson

2014 Veritiv Xpedx and Unisource merge

2014 Amazon shuts down Amazon Supply. Relaunches Amazon B2B Business

2015 Afflink adds Pinnacle Affiliates 28 office supply distributors to membership

2015 Ecolab acquires Swisher

2015 GS Capital acquires GCA

2015 Johnson Controls CBRE acquires Johnsons Controls

2016 PCS Industries is acquired by Ferguson

2016 Vizient acquires Med Assets GPO

2016 Ecolab Sells Swisher to Enviro-Master International Franchise

2016 SP Richards acquires Safety Zone

2016 Matera Paper acquired by Ferguson

2017 CINTAS acquires G&K Services

2017 Buckeye Accelerates corporate owned Cleaning Centers

2017 BAIN Capital acquires Diversy

2017 AFFLINK alliance with Independent Stationers 300 Members

2017 Diversy Care acquires Daylight Medical UVC Disinfection

2017 Lowe's acquires Maintenance Supply Headquarters

2017 ABM acquires GCA

2017 Katy is acquired by Highview Capital and Victory Park Capital

2017 Kellermeier Bergensons Services acquires Varsity Contractors

2017 Diversey acquires Twister Pads

2018 AFFLINK adds Golbon to their membership 211 Members

2018 World Dryer is acquired by Zurn

1991 24,000 independent JanSan distributors

1993 Hillyard accelerates the acquisition of distribution

1996 Wholesale clubs sell commercial cleaning supplies

1997 Newell acquires Rubbermaid.

1999 Nilfisk acquires US Products, Clarke, Viper and Advance

2000 Mountville Mills acquires Andersen Mat

2006 Karcher Acquires Windsor Industries

2008 Integrators accelerate facility supply sales

2009 Staples acquires Corporate Express

2010 Emerson acquires Pro-Team

2011 AMAZON Supply launches facility supplies online

2012 Zep acquires AMREP

2013 JanPak Is acquired by Interline

2014 GOJO acquires Prodene Klint

2014 Deb acquires Stoko

2014 Impact Products is acquired by S.P Richards

2014 SC Johnson acquires DEB / Stoko

2015 Home Depot acquires Interline Supplyworks

2015 SCA Acquires Wausau Paper

2015 Triple S Holdings announces distributor acquisition program

2016 GDI Facility Services becomes publicly traded

2016 Cushman Wakefield merges with DTZ Facility Services

2016 NISSCO RDG merged with Excell

2017 Fuller opens full line All Pro Supply distribution centers

2017 Carlisle acquires San Jamar

2017 Tennant acquires IPC Eagle Group

2017 Hillyard joins the Network Buying Group

2017 Katy Industries files Chapter 11

2017 Imperial Bag & Paper acquisitions Dade Paper

2017 Accommodation Mollen

2017 Peninsular Paper

2017 Burke Supply

2017 Goldman Paper

2017 Borox Paper

2017 Borda Products

2017 Center Moriches Paper

2017 Sifen-Berman Paper

2017 Wasserman Bag

2017 Imperial Bag & Paper

2017 Aramark acquires Ameripride and Aventura GPO

2017 Imperial-Dade acquires Jersey Paper Plus, Central Paper and Kranz

2017 Blue Sage Capital takes a Majority Equity Position of Americo Pads

2017 Imperial-Dade acquires PCA Industrial Paper and Supplies and Sikes Paper

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

2018

2019

2020



Trivest
acquires an
equity
position in
Jon-Don



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.