



IC Market Forecast® & Company Profiles

Industrial & Commercial
Cleaning Machines in
Europe 2025

Company Profiles



Interactive Dashboards



Market Drivers



automatically updated

more than just a report – A TOOL FOR SUCCESS!

Detecting Market Potential



GEO-Maps



Benchmarks



Strategic Workshops



on request

What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2021 – 2024 for the total market development as well as
 - Product Types
 - Customer Types
 - Purchase Types
 - Distribution Channels
- Forecasts from 2025 - 2028 for the total market as well as each analyzed product group and segment
- Annually updates of the data

COMPANY PROFILES

- Top players – company profiles (available for free with 5 countries package)
- Continuous updates of the data

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.
- Continuous updates of the data



Market Analysis

Market Volume

Market Growth

Trends

Profiles

What Do You Get - Your Benefits at a Glance

Presentation of the Data and Deliverables

Market Intelligence Tool Access and Deliverables

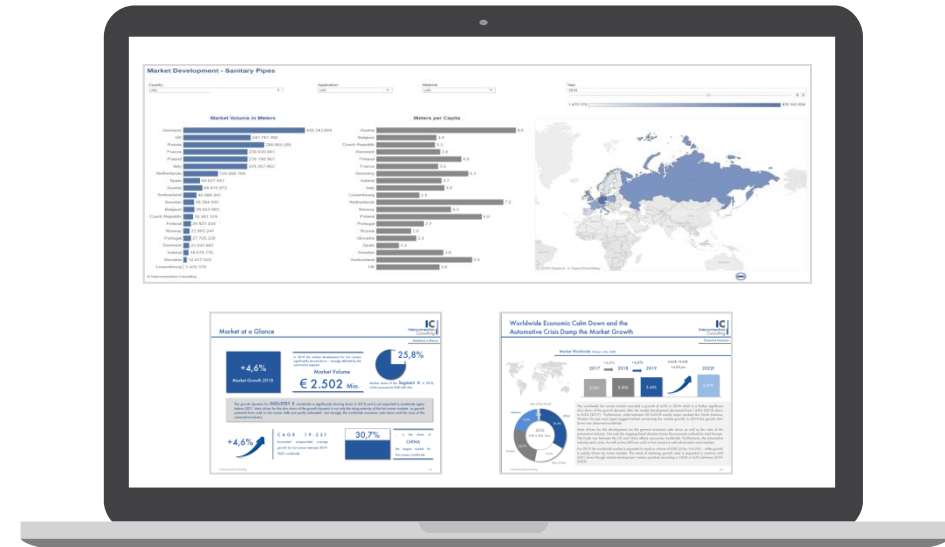


ONLINE-COCKPITS

- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

EXECUTIVE REPORTS

- Executive summary dashboards including key facts of the report and background information about forecasts, trends and the competitive landscape
- Infographics summarizing the market and providing regional comparisons and contrasts



Market Intelligence Tool and Reports



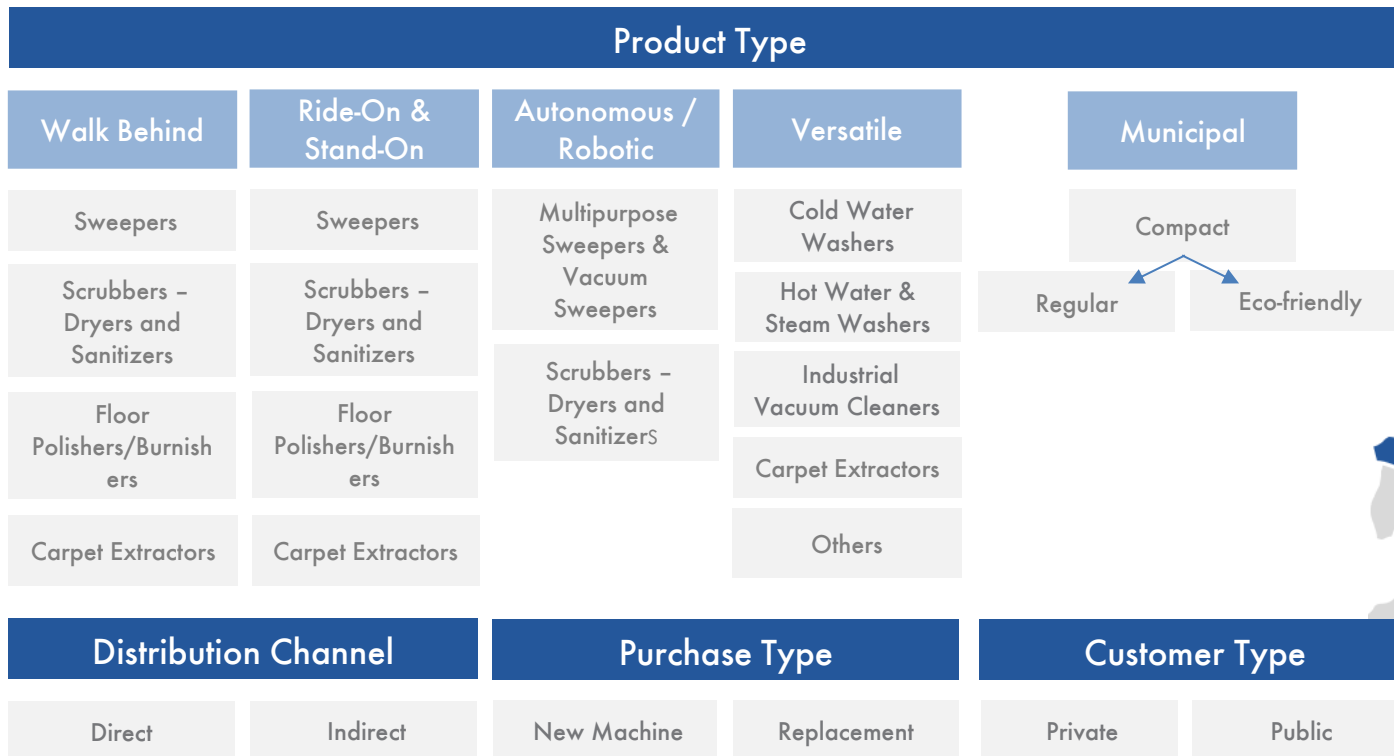
Online Dashboards

IC Market Forecast® & Company Profiles

Industrial & Commercial Cleaning Machines in Europe 2025

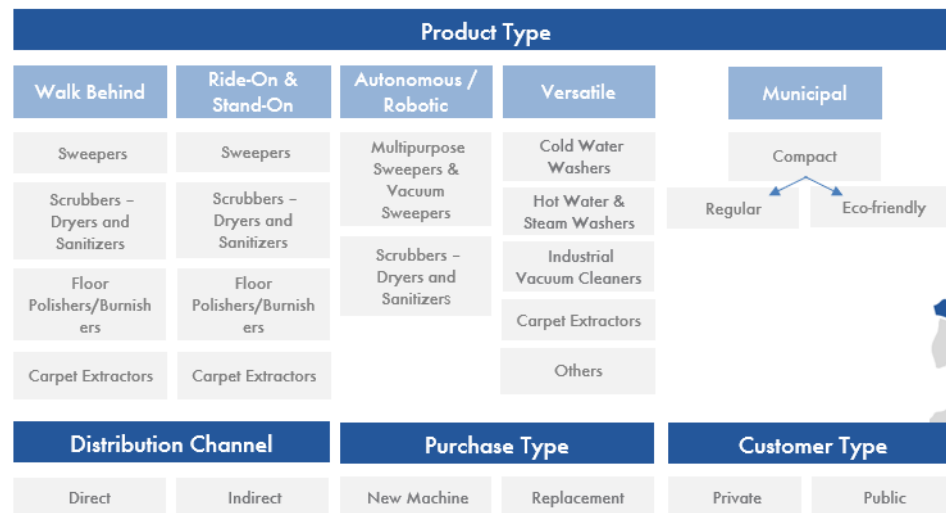
Market Report Structure

Available Countries



Market Structure - Interpretation

Market Report Structure



Available Countries



- Market data are available for each country separately as well as aggregated for the package purchased.
- Each country report includes data for cleaning machines by product types, purchase types, customer types and distribution channels.
- Product Types are available in terms of units sold and total value.
- Distribution Channel, Customer Type and Purchase Type demarcations are only shown in terms of quantity.

Product Type	In this study, we do not consider light cleaning machines (not meant for the Industrial & Commercial segment).
Walk-Behind	Cleaning machines which have to be guided by an operator from behind. Usually, the machine assists the operator with forward motion.
Ride-On & Stand-On	More heavy-duty machines than the above-mentioned categories, driven by an operator.
Autonomous / Robotic	Self-driven cleaning machines that do not require human operator.
Versatile	Cleaning machines that usually come with a separate unit connected to a hose. Useful for reaching difficult spots or for having some special function.
Municipal	Motorized vehicle cleaning machines for public or private outdoor areas like streets, pedestrian zones, outdoor facilities etc. In some special occasions they can be used also for indoor activities if the space is large enough. The larger-sized vehicles are not a part of this research.
New Machines	The total quantity of new machines that are purchased by the company if none are replaced. In the case of replacing old machines and also expanding the stock, the quantity of the replacements is deducted from the total purchased quantity to calculate the quantity of new machines.
Replacement	The quantity of the machines that the company purchases to replace the existing machines that are retiring.

Sweepers

Sweepers work with a rotating, cyclical brush system that scrubs the dirt from the surface with high speed and precision. They do not use water. This category also includes vacuum sweepers.

Carpet Extractors

Carpet extractors spray a mixture of water and detergent before suction, to extract deeply embedded dirt or stains from upholstery and carpets.

Scrubbers – Dryers and Sanitizers

Floor Scrubber-Dryers work similarly to sweepers, but they also use water and detergents to remove the dirt. After the water and brushes have removed the dirt, squeegees put pressure on the surface of the floor to dry it quickly, so that the area can be used almost immediately. Sweeper-Scrubbers are also included in this category.

Floor Polishers/Burnishers

Floor Polishers and Floor Burnishers deliver higher RPM than Floor Scrubbers and are used to create a gloss finish on specific floor types, like wood or vinyl.

Industrial Vacuum Cleaners

Vacuum cleaners use powerful suction to pull up dirt from the floor and other surfaces. They are built to withstand industrial environments. Centralized vacuum cleaners are not considered in this study.

Definition and Demarcations

Cold Water Washers

Also known as power washers, high-pressure washers or jet washers, use pressurised water for powerful cleaning.

Hot Water & Steam Washers

Hot water pressure washers spray hot water under pressure, which effectively softens and loosens dirt for better cleaning results. Many of these machines supply water at very high temperatures, or as steam, so can sanitise surfaces with minimal detergent usage.

Others

Other refers to all product types that are not mentioned above but are used for industrial and commercial purposes. This includes air dryers, all-purpose cleaners, dry ice cleaners, etc.

Compact

Small in terms of size, motorized vehicle machine cleaners.

Eco-Friendly

Environmentally friendly vehicles are vehicles whose construction focusses on reducing their environmental impact.

The Unique Mix of Methods and Approaches for Reliable Market Analysis



SELL-IN

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



Survey with Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**
“Only who talks with the industry knows what’s going on!”

The Market Intelligence Tool

Dashboards - The Best Way to Work with Data

A picture says more
than 1000 words

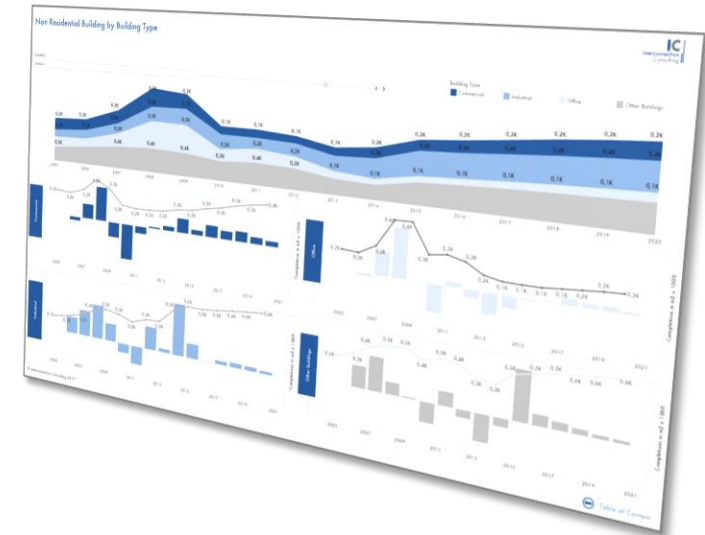
- Complex correlations are visualized in the form of geo-, tree maps, bars etc.

Interactive Dashboards

- Use interactive dashboards for quick implementation of the data, for potential estimations, for sales control, for success measurement etc.

Easy online accesibility

- Market data are available wherever you have internet access
- You can also export the data as .jpg, .csv or .pdf file

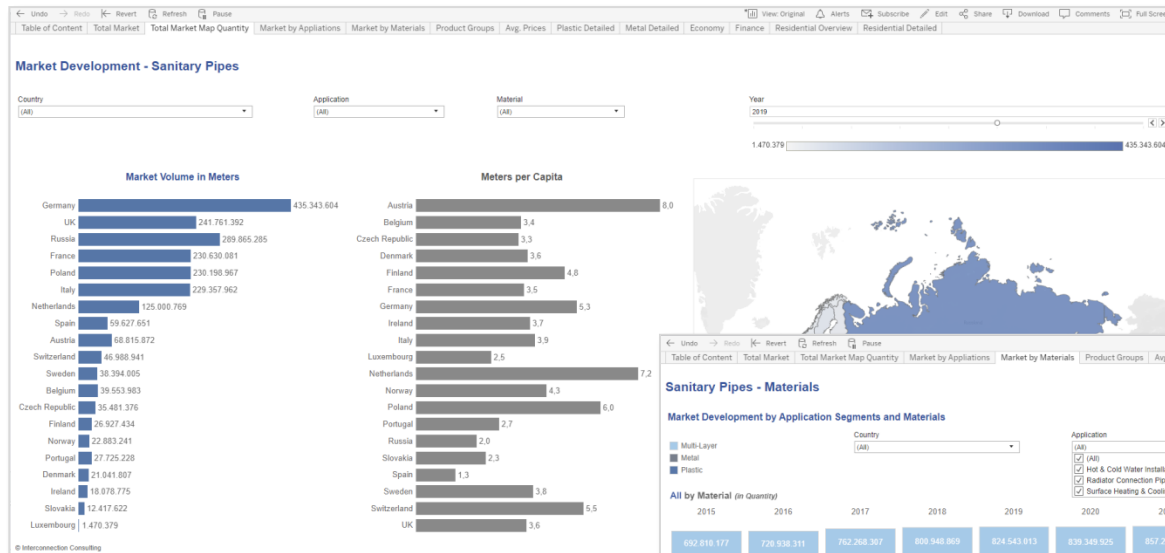


Usability of the Market Intelligence Tool

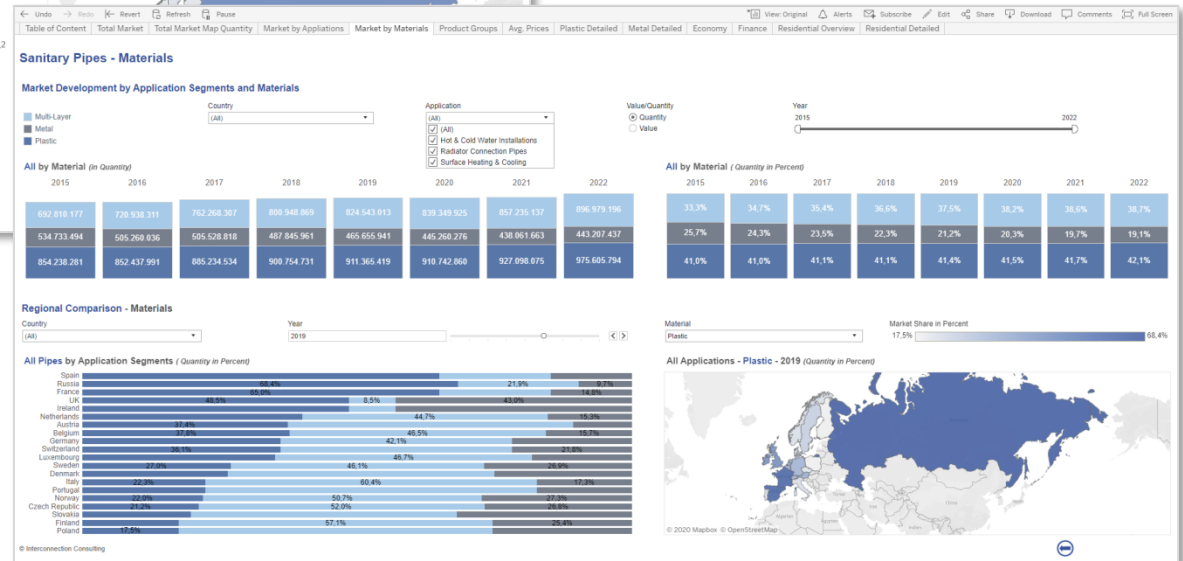
Let's Put it in a Video...



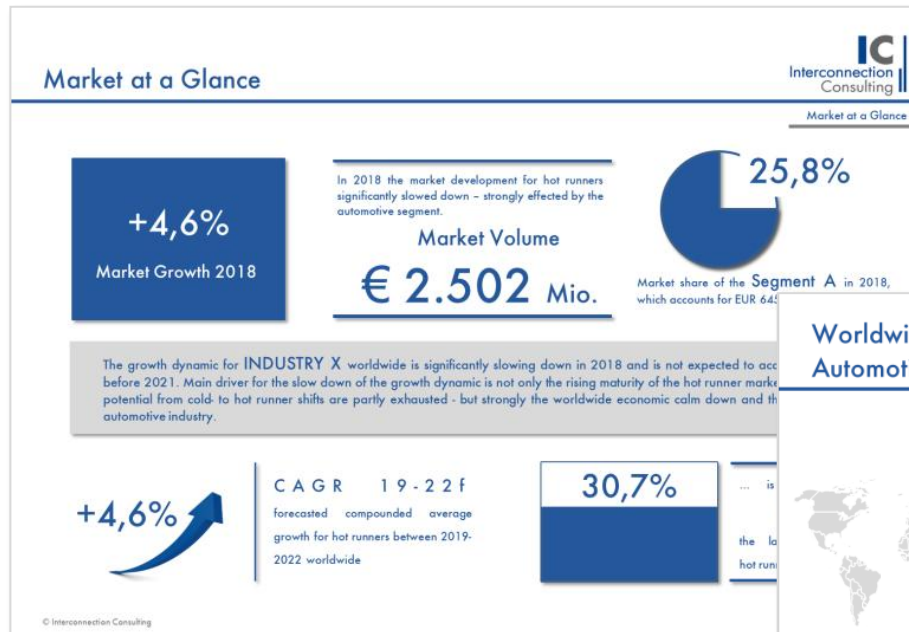
Sample Cockpits for Market Analysis Data



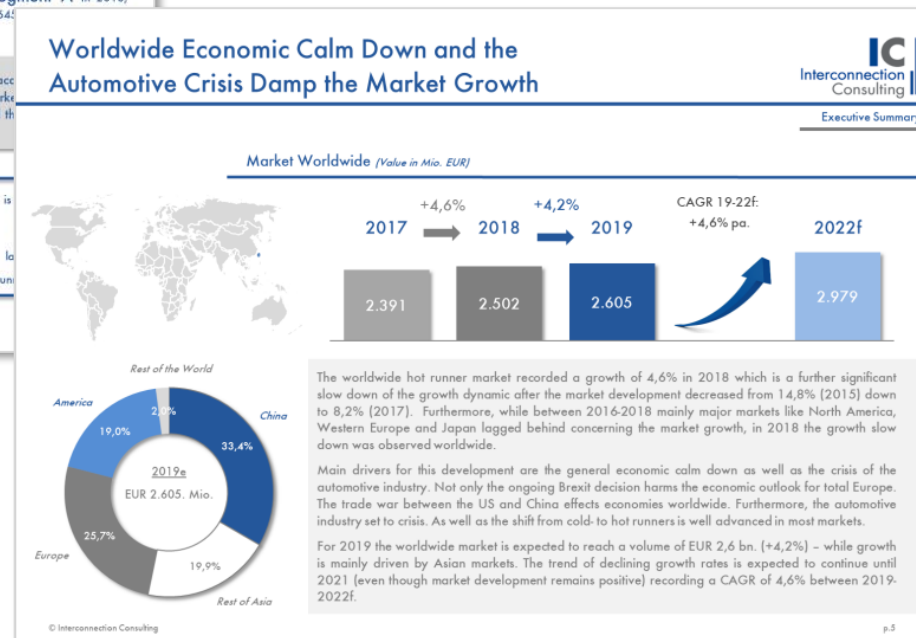
These charts contain fictive data



Additional Deliverables - Executive Summary



Executive Summary as part of Tableau (fictive data)



Executive Summary as part of Tableau (fictive data)

Investment Plan for Your Market Research

IC Market Forecast® & Company Profiles Industrial & Commercial Cleaning Machines in Europe 2025

Prices & Conditions

	Subscription*
1 Country	€ 2.999,-
3 Countries of Your Choice	€ 6.999,-
5 Countries of Your Choice	€ 9.999,-
10 Countries of Your Choice	€ 18.999,-
All Countries	€ 23.999,-



Available Countries

- Austria
- Benelux
- France
- Germany
- Greece
- Italy
- Nordics
- Poland
- Romania
- Spain
- Switzerland
- Turkey
- United Kingdom

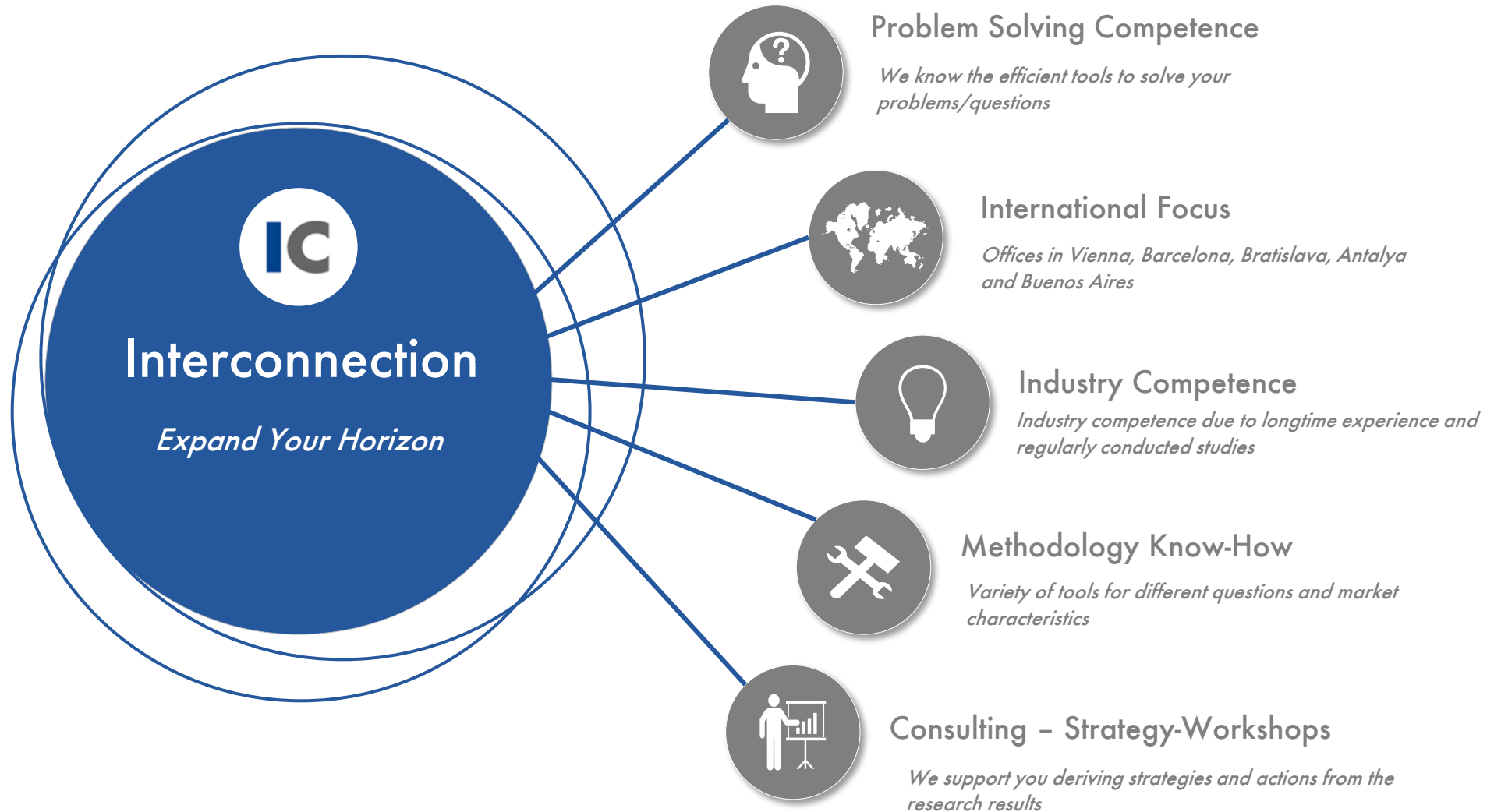
Subscription:

- The price is the individual price for each edition, at least two orders of the study (order year and the following year). Price changes for the next edition must be announced by Interconnection Consulting at least six weeks before 31st December. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year.
- If you have selected single issue (no subscription price advantage) the contract is valid for 12 months.
- Our products/studies will be usually delivered as online dashboards in a common web browser, based on the BI Tool "Tableau" and include one named user license. You have access to these dashboards for the duration of your contract. If you need further licenses, the price is EUR 390,- per user and year. Reports, which as default delivered as online dashboards, can be requested as PDF versions for an additional fee.
- For Purchase on invoice, payable after receipt of invoice without discount within max. of 7 calendar days. We reserve a right to charge statutory default interest charges and reminder fees, if payment period is exceeded.
- Any disputes arising will be settled before a competent court of law in Vienna. We apply Austrian law.

„IC is a constant tutor in the evaluation of markets and offers a helpful decision basis.“

Mr. Bernd Blümmers
General Manager,
Saint-Gobain Solar Systems
Central Europe





Our Market-Intelligence Tools



In case of any questions
please do not hesitate to contact us!

Interconnection Consulting

Obchodná 2, SK- 811 06 Bratislava



Kontantinos Ioannou | *Market Analyst*

Tel +43 1 585 46 23 45

ioannou@interconnectionconsulting.com



Jan Hudak | *Managing Director*

Tel: +43 1 585 46 23 10

hudak@interconnectionconsulting.com

Interconnection Consulting
Vienna • Barcelona • Bratislava • Antalya • Buenos Aires

www.interconnectionconsulting.com



Defining Growth
Potential Since 1998

Yes, we would like to order the IC Market Forecast® & Company Profiles Cleaning Machines Europe 2025

(Please, print out the order form and mark your desired products)

Please, choose from the available countries and package selection

- | | | | | |
|----------------------------------|--|----------------------------------|--------------------------------------|---------------------------------|
| ☐ Austria | ☐ Germany | ☐ Italy | ☐ Romania | ☐ Turkey |
| ☐ Benelux | ☐ Great Britain | ☐ Nordics | ☐ Spain | |
| ☐ France | ☐ Greece | ☐ Poland | ☐ Switzerland | |

- | | |
|---|--------------|
| ☐ 1 Country* | EUR 2.999,- |
| ☐ 3 Countries* | EUR 6.999,- |
| ☐ 5 Countries* | EUR 9.999,- |
| ☐ 10 Countries* | EUR 18.999,- |
| ☐ All Countries* | EUR 23.999,- |

	Single Issue	Subscription*
25% price advantage		✓
IC Cockpit – Online Dashboard Solution	✓	✓
Full Flexibility – Within the sum of the subscription available country reports can be changed without any additional costs		✓
Web-Conference with the analyst free of charge		✓

Billing Address

Company: _____ Name: _____
 Address: _____ Country: _____
 VAT identification number: _____ E-mail: _____

Date	Name	Signature
------	------	-----------

In case of interest in single issue (+25 %), please contact the responsible analyst.

General Terms of Business

Payable on receipt of invoice without discount. Any disputes arising will be settled before a competent court of law in Vienna. We apply Austrian law. The report purchased is based on a specific methodology, which description is available for the customer on request and which fulfillment is the basis of this contract. We claim copyright protection for the work. Distribution to third parties, duplication, publication or revision, even in part, is not permitted. In case of violation the company or persons placing the order agrees to pay a contract penalty of one hundred thousand Euros in each case. All prices shown exclude sales tax. Interconnection reserves the right to use the clients' logo as reference until written revocation.

For Purchase on invoice, payable after receipt of invoice without discount within max. of 7 calendar days. We reserve a right to charge statutory default interest charges and reminder fees, if payment period is exceeded.

* Yearly Subscription:

The price is the individual price for each edition, at least two orders of the study (order year and the following year). Price changes for the next edition must be announced by Interconnection Consulting at least six weeks before 31st December. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. If you have selected single issue (no subscription price advantage) the contract is valid for 12 months.

Our products/studies will be usually delivered as online dashboards in a common web browser, based on the BI Tool "Tableau" and include one named user license. You have access to these dashboards for the duration of your contract. If you need further licenses, the price is EUR 390,-per user and year. Reports, which as default delivered as online dashboards, can be requested as PDF versions for an additional fee.

Benefits of an Interconnection Subscription:

- 25% price advantage compared to single issue. (annual receipt of an IC study or IC study package)
- Annually updated reports on fixed dates.
- One time a year free web conference with the Analyst of the report (presentation of key results, background information, answering of questions)
- Info-Hotline: answering of questions with regards to the report and on methodological issues relating to market research
- Flexible subscription packages on request: alternating countries, product change, etc., if possible