



Sample Output Market Sizing for B2B Categories - USA








Executive Summary



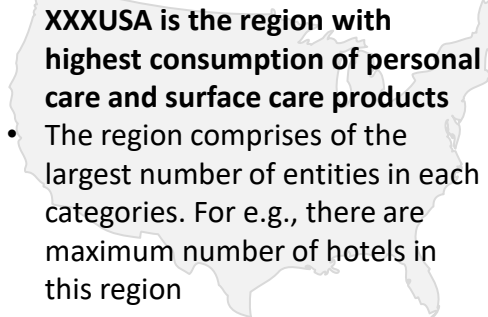
Executive Summary

(1/5)

		Hotels 	Laundromats 	Garages 	Restaurants 	Janitorial 
XXXern	Establishments	●	●	●	●	●
	Consumption PC	●	●	●	●	●
	Consumption SC	●	●	●	●	●
XXXern	Establishments	●	●	●	●	●
	Consumption PC	●	●	●	●	●
	Consumption SC	●	●	●	●	●
XXXern	Establishments	●	●	●	●	●
	Consumption PC	●	●	●	●	●
	Consumption SC	●	●	●	●	●
Mid Western	Establishments	●	●	●	●	●
	Consumption PC	●	●	●	●	●
	Consumption SC	●	●	●	●	●

XXX USA - Opportunity

- For almost all the categories, **XXXUSA is the region with highest consumption of personal care and surface care products**
- The region comprises of the largest number of entities in each categories. For e.g., there are maximum number of hotels in this region



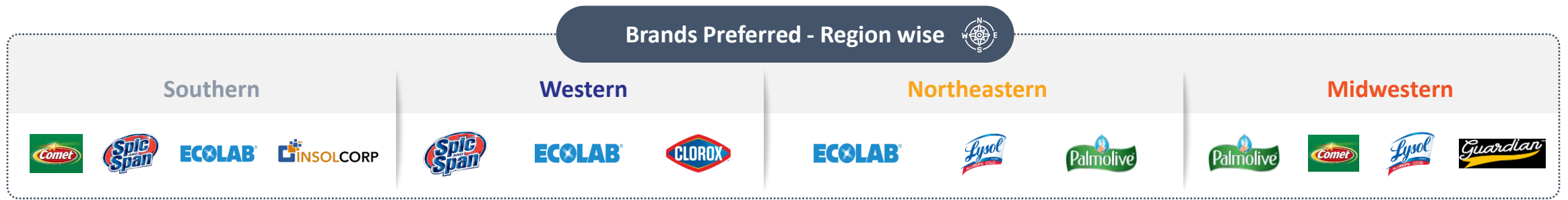
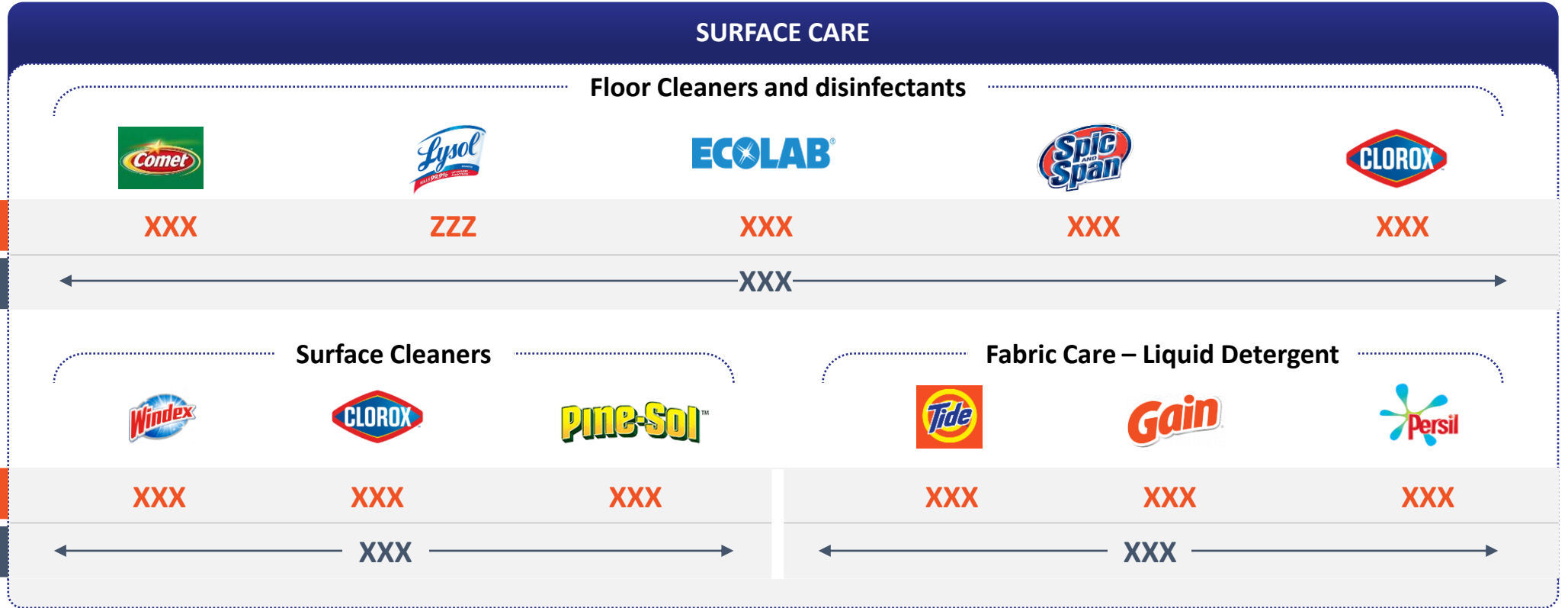
Major States - Opportunity

- Potential states include **New York, XXX, XXX, XXX and XXX** owing to the highest number of hotels, laundromats, restaurants, garages and facility management and janitorial services in the USA

 Maximum (Very High) in the Category
  High in the Category
  Medium in the Category
  Low in the Category



- Every state of the country has **maximum number of XX-star hotels**. Total X-star hotels in the country accounts for almost **XX% of the total hotels in the country**.
- The average yearly **occupancy** ranges between **XX%-XX% in the country**
- An average hotel spends around **USD XX-XX per room a day on amenities** in the USA depending on the level of service the hotel is offering. The average spend for a typical **XX-star hotel may range between USD XX-X0 per room per day**.
- The **brand preference for personal care products is fragmented**. Usually, the **XX stars or chained hotels** prefer **XX personal care products**.
- The **XX- and XX-star hotels** mostly buy the personal care products based on the **product XX** or buy **XXX brands**
- The method of procurement for **XXX hotels is direct manufacturer or XXX operated distribution partners** while the **XX- and XX-star hotels prefer placing an order with independent distributor website**





PERSONAL CARE					
Hand Wash			Sanitizers		
Price per liter (USD)	XX	CCC	XXX	XXX	XXXX
Average Price Range (USD/L)	← XXX →		← XXX →		
Hotel Toiletries					
Shampoo	Conditioner	Body Lotion	Body Wash	Soap	
Price per liter (USD)	CCC	XXX	XXX	XXX	XXX
Average Price Range (USD/L)	XXX	XXX	XXX	XXX	XXX

Hotels



Market Estimation Methodology

Objective – To understand the consumption of personal care and surface care products in hotels (2, 3 and 4 stars) of the USA

Total Hotels in the USA – XXX
Categorized in 4 regions
And identified 2, 3 and 4-star hotels in each region

Identifying and Categorizing Hotels

We gathered information such as number of hotels and state wise number of hotels from associations like American Hotel and Lodging Association and other state associations of hotels for each region (Northeastern, Midwestern, Southern and Western). We identified the top states in each region having the highest number of hotels. Then with the help of some sources like travel booking sites divided those hotels into 2, 3 and 4 stars.



Identified occupancy in all the regions and calculated total addressable market

Total Addressable Market

We also studied the average occupancy and number of rooms in each selected state and calculated the average occupied rooms in all the regions.



Identified and estimated the consumption in the hotels from each region

Understanding the Consumption from Demand Side

Through in-depth secondary research and primary interviews, we studied the average consumption of shampoo, conditioner, body lotion, body wash, soap, floor cleaner and disinfectants, toilet cleaner and window/glass cleaner in these hotels



Studied the supply side and identified major brands and products

Understanding Supply Side

We identified the major suppliers of these personal care (hotel toiletries) and surface care products for hotels in the selected regions and gathered information like the most used brands and products etc.



Market Estimation

Calculating the Market Size of Surface Care and Personal Care Products and Drawing Insights

After gathering insights and numbers from both supply and demand side, we calculated the market for these personal care and surface care products and generated the related insights



XXX region offers the maximum opportunity (XX%) for personal care products in the USA followed by XXX region (XX%) (1/2)

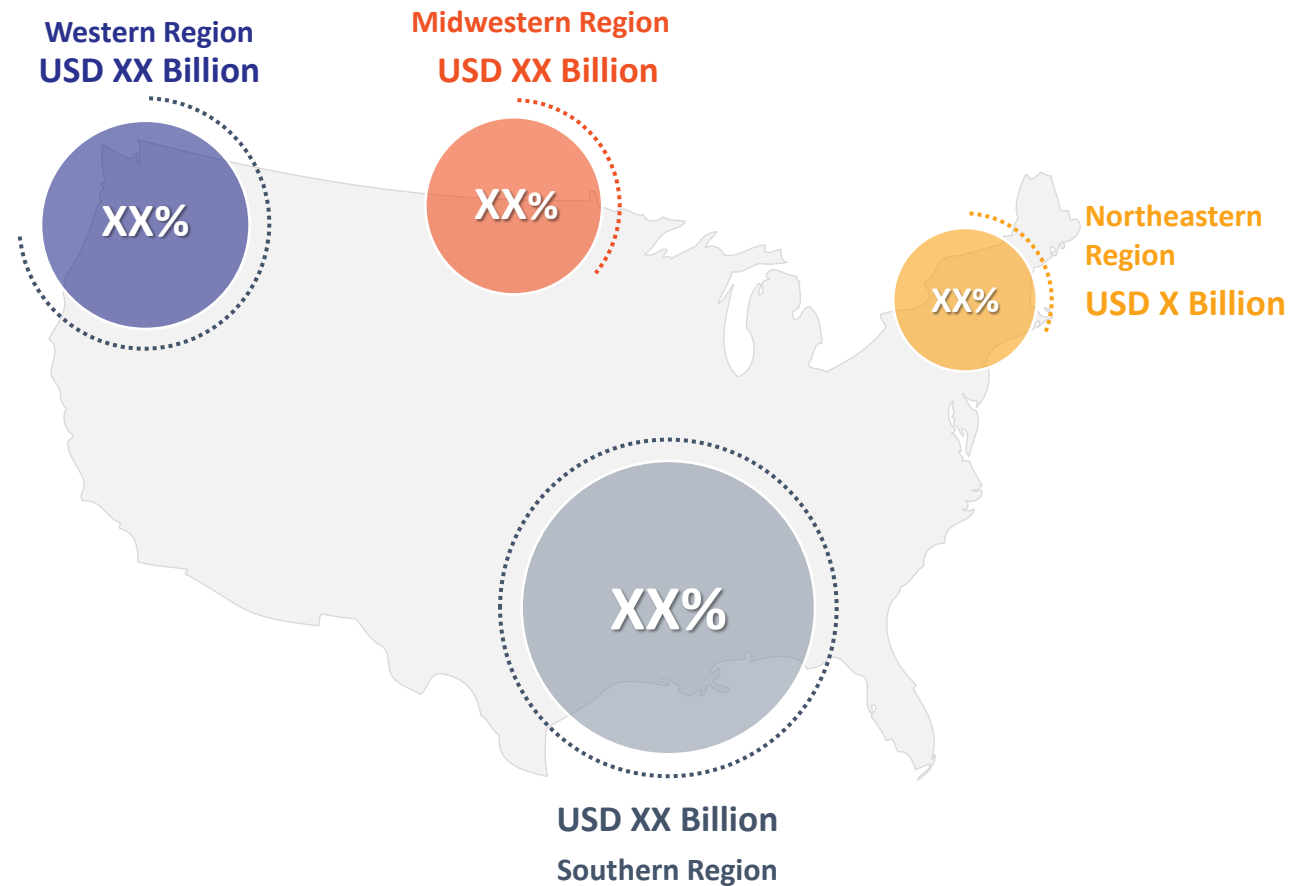
Total market for personal care products (Hotel toiletries including shampoo, conditioner, body wash, body lotion, soap) for hotel category in the USA is estimated to be



Source: Market Estimation Model

Description

Out of the total 4 regions in the USA, XXX region has the maximum consumption of hotel toiletries and accounts for almost XX% of the total market of the country.



XXX region is the major consumer (XX%) of surface care products followed by XX (XX%) in the USA (2/2)

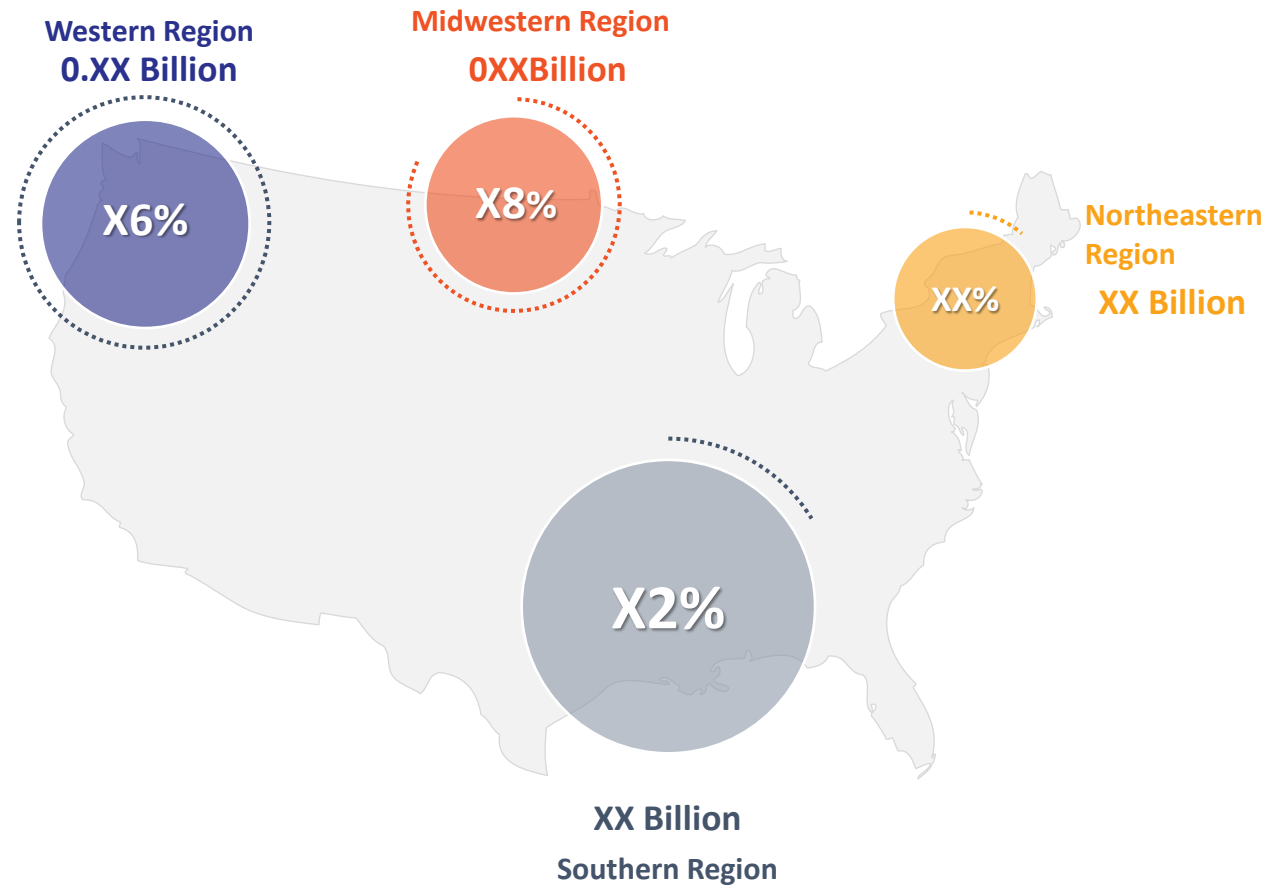
Total market for surface care products (including floor cleaner/disinfectants, toilet cleaner, glass cleaner) for hotel category in the USA is estimated to be



Source: Market Estimation Model

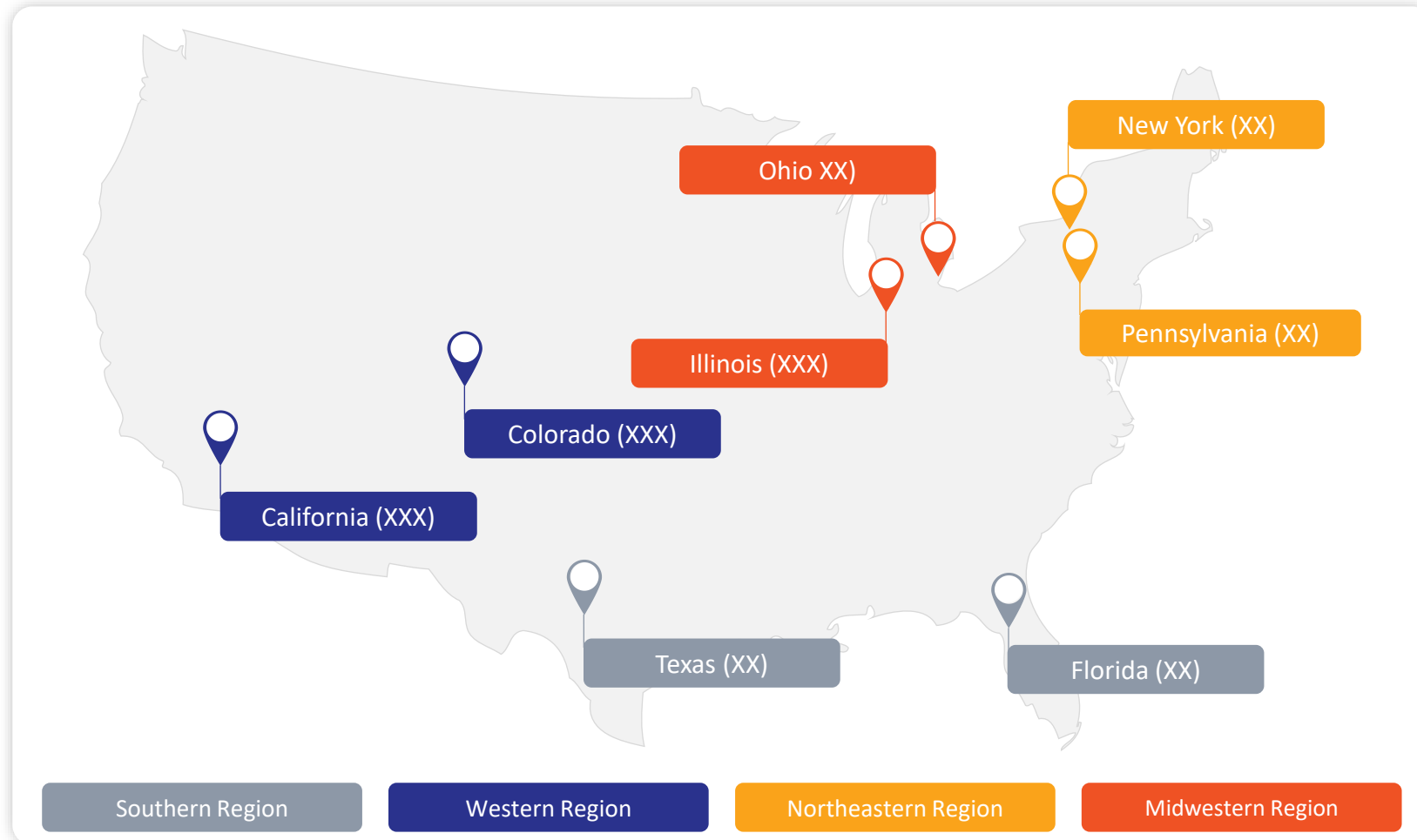
Description

Out of the total 4 regions in the USA, XX region has the maximum consumption of Surface Care products and accounts for almost XX% of the total market of the country, followed by western region with XX% of the total market.



XXX -star hotel dominates the hotels market with average yearly occupancy varying between XX% to XX% across region

Number of Hotels by Key States



- The highest number of hotels are in the XX (XX3) and XX(XX22) regions of the USA
- The states with highest numbers of hotels are XX(X6), TXX (XX44), XX (XX1) and XX(XX8)
- Every state has maximum number of XX-star hotels
- The average yearly occupancy ranges between X%-XX% in the country

Market Estimates- Hotels

Western Total Consumption (Annual)		
Surface Care	Value USD million	Volume Mn L
Floor Cleaner	XX	XX
Toilet Cleaner	XX	XX
Window/Glass Cleaner	XX	XX
Personal Care	Value USD million	Volume Mn L
Shampoo	XX	XX
Conditioner	XX	XX
Body Wash	XX	XX
Body Lotion	XX	XX
Soap	XX	XX

Midwestern Total Consumption (Annual)		
Surface Care	Value USD million	Volume Mn L
Floor Cleaner	XX	XX
Toilet Cleaner	XX	XX
Window/Glass Cleaner	XX	XX
Personal Care	Value USD million	Volume Mn L
Shampoo	XX	XX
Conditioner	XX	XX
Body Wash	XX	XX
Body Lotion	XX	XX
Soap	XX	XX

Northeastern Total Consumption (Annual)		
Surface Care	Value USD million	Volume Mn L
Floor Cleaner	XX	XX
Toilet Cleaner	XX	XX
Window/Glass Cleaner	XX	XX
Personal Care	Value USD million	Volume Mn L
Shampoo	XX	XX
Conditioner	XX	XX
Body Wash	XX	XX
Body Lotion	XX	XX
Soap	XX	XX

Southern Total Consumption (Annual)		
Surface Care	Value USD million	Volume Mn L
Floor Cleaner	XX	XX
Toilet Cleaner	XX	XX
Window/Glass Cleaner	XX	XX
Personal Care	Value USD million	Volume Mn L
Shampoo	XX	XX
Conditioner	XX	XX
Body Wash	XX	XX
Body Lotion	XX	XX
Soap	XX	XX

Source: Market Estimation Model

XXXX and XXX region has the maximum consumption of personal care and surface products

Regions/ Parameters		Northeastern (XX)	Midwestern (XXX)	Southern (XXX)	Western (XXX)				
Occupancy	2 Star								
	3 Star								
	4 Star								
Consumption		Hotel Toiletries	Surface Care Products	Hotel Toiletries	Surface Care Products	Hotel Toiletries	Surface Care Products	Hotel Toiletries	Surface Care Products
	2 Star								
	3 Star								
	4 Star								

Matrix		Occupancy	Matrix		Consumption
	High	Above XX%		High	>XX Mn L
	Medium	XX% - XX%		Medium	5 – XX Mn L
	Low	Below XX%		Low	<XX Mn L

Source: Market Estimation Model

XXX-star hotels prefer branded products in the personal care segment, while in surface care, both branded as well as local products are used

Categories	2 Star ★★		3 Star ★★★		4 Star ★★★★	
	Brands	Price (USD/L)	Brands	Price (USD/L)	Brands	Price (USD/L)
Shampoo	Local brands and other brands likeXXX	XX	Local brands and other brands like Paul Mitchell, La fresh, and Bath and Body Works	XX	Brands like Bliss, Malin and Goetz, C.O. Bigelow, Aroma Therapy Associates, Asprey and L'occitane	XX
Conditioner		XX		XX		
Body Lotion		XX		XX		
Body Wash		XX		XX		
Soap		XX		XX		
Floor Cleaner	Local brands and other brands likeXXXlikeXXX	XX	Local brands and other brands like Comet Cleaner, Ecolab, Lysol	XX	Brands like Ecolab, Lysol, Clorox, Spic and Span	XX
Toilet Cleaner	Local brands and other brands like likeXXXlikeXXXlikeXXX	XX	Local brands and other brands like Ecolab, Lysol, Mr. Clean	XX	Local brands and other brands like Ecolab, Lysol, Clorox, Mr. Clean, Ecos Pro	XX
Window/ Glass Cleaner	Local brands and other brands likeXXX	XX	Local brands and other brands like Zep, Ecos Pro and	XX	Local brands and other brands like CRC, Claire, Ecos Pro and Windex,	XX

- The prices mentioned are the average prices considering both the unbranded and branded products (For example shampoo prices may range from USD 6 – USD 40 in 2-star hotels, USD 8 – USD 50 in 3-star hotel and USD 15 – USD 60 in 4 –star hotel). For calculation purpose, average values have been used.
- Some hotel chains prefer to use **common toiletries brand for all their hotels** (be it 2-star or 3-star)
- 2-Star and 3-Star hotels also prefer **local brands** for surface cleaning and personal care products
- Since hotels are banning use of mini plastic bottles for toiletries, **refillable large format bottles will be in trend in order to minimize the usage of plastic**

Benori Knowledge is a global provider of custom research and analytics solutions across industries, including consumer & retail, technology, media & telecom, internet & e-commerce, professional services, financial services, healthcare, industrials and education & social. We offer solutions aimed at supporting our clients' strategic needs that are critical to accelerate their growth and value creation.

Our team of knowledge consultants is committed to minimising the challenges faced due to high costs, poor access and low quality of knowledge processes, and transforming them to deliver best-in-class actionable insights.

Headquartered in India, we serve clients across the world.

Simplifying Decisions.



info@benoriknowledge.com



www.benoriknowledge.com

BENORI