




FACILITYCARE360™

PRODUCTS AND SOLUTIONS FOR THE INDUSTRIAL AND INSTITUTIONAL INDUSTRY



Our Promise
To You.

THE ASHBURN PROMISE

Ashburn delivers product solutions and a trusted brand and superior value add to our distributors. We bring game-changing innovation, product rationalization, world-class customer service and best-in-class training and marketing programs to support our network of distributors.

The Ashburn Promise:

We will deliver the innovative products and performance you expect, every time, bearing results that make you stand out while improving profitability. With Ashburn, you'll gain a partner who provides more value for long-term growth, increased revenue with margin opportunities and efficiencies.



WHY ASHBURN

For more than 50 years, Ashburn Chemical Technologies has "GONE BEYOND." With FacilityCare360™, Ashburn continues that partnership and is with you every step of the way. With a robust facility care program that span various industries and serve many facilities, your needs are met from start to finish.

Keep your facility clean and safe for your most valuable resources. Ashburn can help protect your environment with the highest quality cleaning, sanitizing, disinfecting and deodorizing products.

Ashburn is committed to serving the community by providing the disinfecting and sanitization products and services that allow you to cost-effectively protect your most valuable resources.

- Leaders in chemistry since 1968
- Loyal partnerships with our distributors
- Unparalleled customer service
- Problem solving - responsiveness
- Technology, innovation and R&D
- EPA and TTB registered establishment
- Technical support (PhD chemists, solution engineers, laboratory)
- Broad product line and complete services offering
- Partnership and customer driven culture

EXCLUSIVE BRANDING
Complete line of industrial and institutional (I&I) products

TRAINING
Product and application training through virtual and in-person presentations, including "how-to" videos to support site managers and salespeople

MARKETING SUPPORT
Support for your sales efforts with product labels, technical data sheets, safety data sheets, etc.

COMPLIANCE
Comply with all regulations, certifications and regulations

INNOVATION
New products and services that will lower your customers' cost and provide a cleaner, safer environment

FLUID SERVICE TECHNOLOGIES
Consulting, training and on-site FacilityCare services





FACILITYCARE MARKET OVERVIEW

FacilityCare end users will consume \$5.3 billion of cleaning products at end user pricing in 2020.

Historically, the overall Industrial and Institutional (I&I) market grows slowly as suppliers strive for more effective and durable products. Growth over the past 10 years has been in the 2.5 - 3.5% range and, in general, tracks the steady increase in the US population and suppliers take annual price increases. Further, as suppliers can demonstrate value in product performance, labor reduction and worker safety, they can take pricing commensurate with the value they provide. Each end-user sector has its own growth curve based on changes in the US population, employment statistics and other market factors.

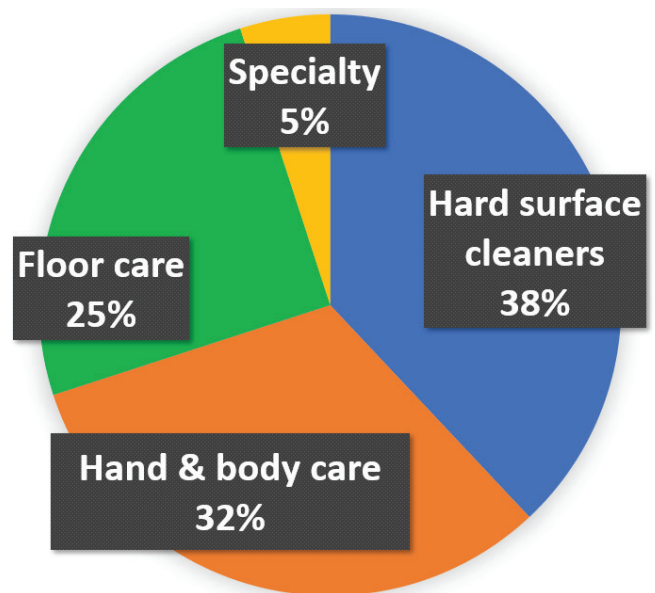
The global pandemic has impacted the daily lives of the US population. We were first alerted to Covid-19 in February 2020 and by March 2020, people began to change their patterns of social behavior, entertainment and travel.

Demand for and consumption of any product that cleaned, sanitized and/or disinfected skyrocketed. Purchases of these products dramatically increased at the end use sector level with shortages occurring as all manufacturers faced shortages of raw materials, packaging, manufacturing labor and even transportation. Government entities began to order the closures and other restrictions on businesses and the population enacted across much of the country.

The virus continued to spread and, with that, many retail, education, hospitality, industrial and local end facilities began to close in April 2020.

As of this report, the government is beginning to loosen restrictions, but the overall economy has been slow to recover as many people are still wary of contracting the virus.

Suppliers in most of the product commodities in the overall FacilityCare sector of the I&I market reported double digit sales growth in the first two quarters of 2020.





MARKET BY CATEGORY

HARD SURFACE

The largest category of products being sold the FacilityCare industry in 2020 to distributors is **hard surface cleaners** at approximately **38%** of the total market or **\$1.611 billion**.

The Hard Surface Cleaning category is being driven by the increased demand for cleaning over the past few years and innovative new products. Advanced chemistries in various formulations and offerings are increasing demand from every end user sector. Green cleaning chemicals continue to grow slowly in the category with most end user sectors.

HAND & BODY CARE

The Hand and Body Care category, including general purpose, antiseptic, sanitizer, industrial, shampoo and protectants is the second largest category of products in FacilityCare and is the fastest growing category.

This category of skin care in facility care is conservatively estimated at **32%** of the overall market in 2020 with manufacturer sales to distribution and direct of **\$1.357 billion**.

Most major manufacturers are promoting their brands with the message that hand washing is key to health.

Sales of skin care products may not directly correspond to end user sector size. By far the largest end use sectors for skin care are health care facilities followed education facilities, industrial facilities and building service contractors. Foam soap formulas and dispensers continue to penetrate the dispensed skin care market as they are sold as being the most cost effective.

Hand sanitizer continues to grow exponentially while many non-traditional manufacturers have entered the market during the pandemic and liquid skin care products continue to sell well in industrial sector.

FLOOR CARE

Floor Care systems are now the third largest category of products at **25%** of the total market or **\$1.060 billion**.

Many facilities in all sectors are replacing vinyl floors with no-wax substrates, including concrete.

Innovation will continue to develop for maintaining concrete and we see more emphasis from the leading floor care systems manufacturers to meet the demand. Walmart, Lowes and Home Depot are but three companies that are achieving good results from utilizing concrete only substrates in their stores.

SPECIALTY

The Specialty category included deodorizers, air fresheners, insecticides, warewashing, laundry care and other products used in Facility Care.

This category will have suppliers sales of approximately **5%** of the total market or **\$212 million**. There are opportunities for many niche suppliers in this category that can dominate a category with focus, product excellence and marketing and expertise.



APPLICATIONS

LOBBY ENTRYWAY COMMON AREAS

DISPENSER/STAND
HAND SANITIZER
MICROCLOUD™ LITE
NON-ACID DISINFECTANT
FOAMING GERMICIDAL
CLEANER
FLOOR SCRUBBER
HOSPITAL SPRAY DISINFECTANT



PRODUCTION

NON-ACID DISINFECTANT
FOAMING GERMICIDAL CLEANER
FLOOR SCRUBBER
GENERAL PURPOSE CLEANER DEGREASER
MICROCLOUD™ SANITIZATION UNIT



SHIPPING/RECEIVING/WAREHOUSE

HAND SANITIZER
DISPENSER/STAND
NON-ACID DISINFECTANT
FOAMING GERMICIDAL CLEANER
FLOOR SCRUBBER
GENERAL PURPOSE CLEANER DEGREASER
MICROCLOUD™ SANITIZATION UNIT



MEETING ROOMS OFFICE SPACE

DISPENSER/STAND
HAND SANITIZER
MICROCLOUD™ LITE
NON-ACID DISINFECTANT
FOAMING GERMICIDAL CLEANER
FLOOR SCRUBBER
HOSPITAL SPRAY DISINFECTANT



TRAINING ROOMS BREAK ROOMS

DISPENSER/STAND
HAND SANITIZER
MICROCLOUD™ LITE
NON-ACID DISINFECTANT
FOAMING GERMICIDAL CLEANER
FLOOR SCRUBBER
HOSPITAL SPRAY DISINFECTANT

MANUFACTURING

NON-ACID DISINFECTANT
FOAMING GERMICIDAL CLEANER
FLOOR SCRUBBER
GENERAL PURPOSE CLEANER DEGREASER
MICROCLOUD™ SANITIZATION UNIT

HIGH-TRAFFIC AREAS

DISPENSER/STAND
HAND SANITIZER
MICROCLOUD™ LITE
NON-ACID DISINFECTANT
FOAMING GERMICIDAL CLEANER
FLOOR SCRUBBER
HOSPITAL SPRAY DISINFECTANT

ACTICARE™ PRODUCTS

HARD SURFACE			
PRODUCT CATEGORY	SIZE (QTY CASE)	PRODUCT DESCRIPTION	MAJOR BRAND NAME COMPARISON
ALL PURPOSE CLEANER	AEROSOL 20 OZ (12)	ALL PURPOSE CLEANER	SPRAYON ALL PURPOSE CLEANER AEROSOL, SPRAYWAY ALL PURPOSE CLEANER AEROSOL, SUPER CLEAN FOAM CLEANER DEGREASER AEROSOL
GLASS CLEANER	AEROSOL 20 OZ (12)	GLASS CLEANER	WINDEX FOAMING AEROSOL, SPRAYWAY GLASS CLEANER AEROSOL, ZEP GLASS CLEANER AEROSOL
AEROSOL DISINFECTANT	AEROSOL 20 OZ (12)	FOAMING GERMICIDAL CLEANER	SCRUBBING BUBBLES DISINFECTANT FOAM CLEANER AEROSOL, DIVERSEY ENVY FOAMING GERMICIDAL AEROSOL, BETCO CIDE-BET II FOAMING GERMICIDAL AEROSOL
SPRAY DISINFECTANT	AEROSOL 20 OZ (12)	DISINFECTANT/DEODORANT	LYSOL DISINFECTANT SPRAY AEROSOL, CLOROX DISINFECTANT SPRAY AEROSOL, DIVERSEY END BAC II DISINFECTANT AEROSOL
INDUSTRIAL CLEANER/DEGREASER	AEROSOL 20 OZ (12)	CLEANER DEGREASER NON-FLAM	LPS HDX DEGREASER, CRC HEAVY DUTY DEGREASER AEROSOL, ZEP AEROSOLVE II
GLASS CLEANER	1 QT (12)	GLASS CLEANER RTU W/TRIGGER SPRAYER	WINDEX, GLASS PLUS, 409 GLASS & SURFACE CLEANER
BOWL CLEANER	1 QT (12)	NON-ACID BOWL & BATHROOM CLEANER DISINFECTANT	CREW NA BY DIVERSEY, BETCO FIGHT BAC RTU DISINFECTANT CLEANER, SPARTAN NABC DISINFECTANT CLEANER
	1 QT (12)	CLINGING BOWL CLEANER - ACID	ZEP ACIDIC GEL BOWL CLEANER, BETCO KLING BOWL CLEANER, LIME A-WAY TOILET BOWL CLEANER GEL
SHOWER, TUB & TILE	1 QT (12)	TUB & TILE DEFILMER W/TRIGGER SPRAYER	LIME-A-WAY CLEANER SPRAY, ZEP SHOWER, TUB AND TILE CLEANER, DIVERSEY CREW TUBE & TILE CLEANER
DISINFECTANT CLEANER DEODORANT (QUAT 32:1)	1 GAL (4)	PINECON DISINFECTANT	PINESOL, LYSOL PINE DISINFECTING CLEANER CONCENTRATE, BETCO PINE QUAT
	5 GAL (1)	PINECON DISINFECTANT	PINESOL, LYSOL PINE DISINFECTING CLEANER CONCENTRATE, BETCO PINE QUAT
ALL PURPOSE CLEANER DEGREASER	1 QT (12)	ENVIRO-GREEN ALL PURPOSE CLEANER/DEGREASER W/TRIGGER	SIMPLE GREEN, CRC HYDROFORCE BUTYL FREE, CLEANER DEGREASER, MEAN GREEN CLEANER DEGREASER
	1 GAL (4)	ENVIRO-GREEN ALL PURPOSE CLEANER/DEGREASER	SIMPLE GREEN, CRC HYDROFORCE BUTYL FREE, CLEANER DEGREASER, MEAN GREEN CLEANER DEGREASER
	5 GAL (1)	ENVIRO-GREEN ALL PURPOSE CLEANER/DEGREASER	SIMPLE GREEN, CRC HYDROFORCE BUTYL FREE, CLEANER DEGREASER, MEAN GREEN CLEANER DEGREASER
	55 GAL (1)	ENVIRO-GREEN ALL PURPOSE CLEANER/DEGREASER	SIMPLE GREEN, CRC HYDROFORCE BUTYL FREE, CLEANER DEGREASER, MEAN GREEN CLEANER DEGREASER

ACTICARE™ PRODUCTS

HAND AND BODY CARE			
PRODUCT CATEGORY	SIZE (QTY CASE)	PRODUCT DESCRIPTION	MAJOR BRAND NAME COMPARISON
HAND SOAP W/LOTION	1 GAL (4)	PINK LOTION HAND CLEANER	GOJO ALL PURPOSE PINK SKIN CLEANSER, BETCO WINNING HANDS PINK LOTION HAND SOAP, KUTOL PINK LOTION HAND SOAP
INDUSTRIAL HAND SOAP	4.5 LB (6)	HAND CLEANER W/GRIT	GOJO ORIGINAL PUMICE HAND CLEANER, ZEP ORANGE WITH PUMICE, PERMATEx FAST ORANGE
HAIR & BODY SOAP	1 GAL (4)	HAIR & BODY SOAP	BETCO HAIR AND BODY SHAMPOO, ZEP HEAD TO TOE, DIAL PROFESSIONAL BODY & HAIR SHAMPOO
HAND SANITIZER	ALL SIZES		PURELL HAND SANITIZERS, GERMx HAND SANITIZERS
HAND SANITIZER DISPENSER	STANDARD	WALL MOUNT DISPENSER - SPRAY	
	STANDARD	WALL MOUNT DISPENSER - DROPLET	
HAND SANITIZER STAND	STANDARD	HAND SANITIZER STAND	
DISPENSER W/ STAND	STANDARD	HAND SANITIZER DISPENSER W/ STAND - SPRAY	
	STANDARD	HAND SANITIZER DISPENSER W/ STAND - DROPLET	

ACTICARE™ PRODUCTS

FLOOR CARE			
PRODUCT CATEGORY	SIZE (QTY CASE)	PRODUCT DESCRIPTION	MAJOR BRAND NAME COMPARISON
GP FINISH	1 GAL (4)	HIGH GLOSS FLOOR FINISH 16 - 18% SOLIDS	DIVERSEY CAREFREE, BETCO HYBRID FLOOR FINISH, ZEP Z-TREAD UTILITY FLOOR FINISH
	5 GAL (1)	HIGH GLOSS FLOOR FINISH 16 - 18% SOLIDS	DIVERSEY CAREFREE, BETCO HYBRID FLOOR FINISH, ZEP Z-TREAD UTILITY FLOOR FINISH
UHS FINISH	1 GAL (4)	PREMIUM FLOOR FINISH HIGH-GLOSS	DIVERSEY MAINSTAY FLOOR FINISH, BETCO HIGH TECH FLOOR FINISH, ZEP Z-TREAD UHS FLOOR FINISH
	5 GAL (1)	PREMIUM FLOOR FINISH HIGH-GLOSS	DIVERSEY MAINSTAY FLOOR FINISH, BETCO HIGH TECH FLOOR FINISH, ZEP Z-TREAD UHS FLOOR FINISH
FLOOR CLEANER	1 GAL (4)	NEUCLEAN LEMON	DIVERSEY STRIDE NEUTRAL CLEANER, BETCO PH7 NEUTRAL FLOOR CLEANER, ZEP NEUTRAL PH FLOOR CLEANER
	5 GAL (1)	NEUCLEAN LEMON	DIVERSEY STRIDE NEUTRAL CLEANER, BETCO PH7 NEUTRAL FLOOR CLEANER, ZEP NEUTRAL PH FLOOR CLEANER
HEAVY DUTY STRIPPER	1 GAL (4)	NO RINSE FLOOR STRIPPER	DIVERSEY FREEDOM FLOOR STRIPPER, BETCO UNLOCK FLOOR STRIPPER, ZEP HEAVY DUTY FLOOR STRIPPER
	5 GAL (1)	NO RINSE FLOOR STRIPPER	DIVERSEY FREEDOM FLOOR STRIPPER, BETCO UNLOCK FLOOR STRIPPER, ZEP HEAVY DUTY FLOOR STRIPPER

ACTICARE™ PRODUCTS

SPECIALTY			
PRODUCT CATEGORY	SIZE (QTY CASE)	PRODUCT DESCRIPTION	MAJOR BRAND NAME COMPARISON
FURNITURE POLISH	AEROSOL 20 OZ (12)	FURNITURE POLISH	PLEDGE FURNITURE POLISH AEROSOL, OLD ENGLISH FURNITURE POLISH AEROSOL, BEHOLD FURNITURE POLISH AEROSOL
STAINLESS STEEL POLISH	AEROSOL 20 OZ (12)	SS CLEANER	WEIMAN STAINLESS STEEL CLEANER AEROSOL, ZEP STAINLESS STEEL CLEANER AEROSOL, BETCO STAINLESS STEEL CLEANER AEROSOL
DEODORIZER	AEROSOL 20 OZ (12)	FLORAL - DRY AIR FRESH	GLADE AEROSOL-LAVENDER, AIR WICK AEROSOL AIR FRESHENER-LAVENDER, FEBREZE AEROSOL AIR FRESHENER-FRESH BLOOM
	AEROSOL 20 OZ (12)	SPICE - DRY AIR FRESH	GLADE AEROSOL-APPLE CINNAMON, AIR WICK AEROSOL AIR FRESHENER-APPLE CINNAMON, FEBREZE AEROSOL AIR FRESHENER-SPICED APPLE
	AEROSOL 12 OZ (12)	FRESH N'CLEAN - METERED AIR FRESHENER	TIMEMIST METERED AIR FRESHENER, ZEP METER MIST AIR FRESHENERS, SPRAY SCENTS METERED AIR FRESHENERS
ROACH & ANT SPRAY	AEROSOL 20 OZ (12)	ROACH & ANT SPRAY	RAID ROACH & ANT SPRAY, HOT SHOT ROACH & ANT SPRAY, BLACK FLAG ROACH & ANT SPRAY
WASP SPRAY	AEROSOL 20 OZ (12)	WASP & HORNET SPRAY	RAID WASP & HORNET SPRAY, HOT SHOT WASP & HORNET SPRAY, BLACK FLAG WASP & HORNET SPRAY
FLYING INSECT SPRAY	AEROSOL 20 OZ (12)	FLY & MOSQUITO SPRAY	RAID FLYING INSECT SPRAY, HOT SHOT FLYING INSECT SPRAY, BLACK FLAG FLYING INSECT SPRAY
HAND DISHWASHING SOAP	1 QT (12)	HAND DISHWASHING SOAP - LIQUID	JOY DISHWASHING LIQUID, DAWN DISHWASHING LIQUID, PALMOLIVE DISHWASHING LIQUID
	1 GAL (4)	HAND DISHWASHING SOAP - LIQUID	JOY DISHWASHING LIQUID, DAWN DISHWASHING LIQUID, PALMOLIVE DISHWASHING LIQUID
LAUNDRY DETERGENT	1 GAL (4)	LIQUID LAUNDRY DETERGENT - LIQUID	TIDE LIQUID LAUNDRY DETERGENT, ALL LIQUID LAUNDRY DETERGENT, PUREX LIQUID LAUNDRY DETERGENT

PROTECT YOUR RESOURCES. FACILITY CARE 360™



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