

# Green Cleaning: Marketplace Drivers

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Intertech Pira, Cleaning Products '08



- ISSA: Non-Profit Trade Association
- Institutional & Industrial Cleaning Industry
- Over 5,500 Members
  - Manufacturers
  - Distributors
  - Contract Cleaners
  - In-House Service Providers

# Overview

- Market Drivers of Green Cleaning
- Factors Affecting Demand for Green
  - Government Procurement Policies
  - NGO Initiatives
- Factors Affecting Supply of Green
  - Regulatory Climate
  - Recognition Programs



# Govt Procurement Policies

- State and Federal Programs
- Direct Impact on Public Sector
- Indirect Impact on Private Sector



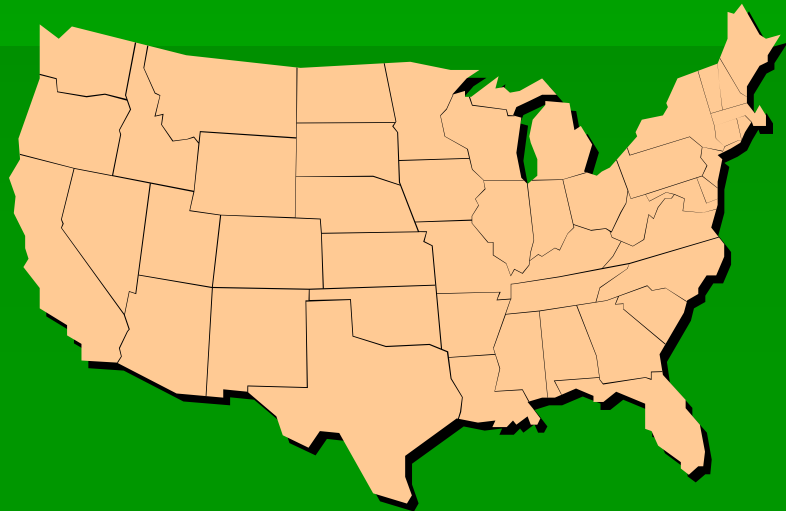
# State Procurement Policies

- 16 States
  - CA, CO, CT, IL, IN, MA, ME, MI, MN, MO, NJ, NY, OR, PA, VT, WA
- Mandatory / RFPs / Voluntary
- Executive Order / Statutory / Policy



# State Procurement Policies

- Will Continue to Grow
- 12 States Poised to Move Forward
  - HSC National Summit: Green Cleaning for Schools
- Impact on Public & Private Sector

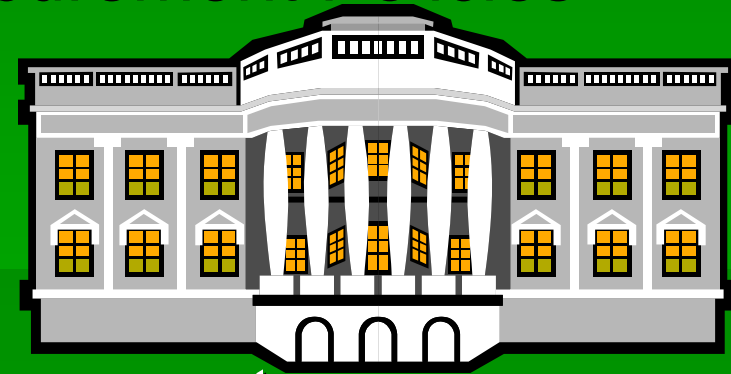


# Fed Procurement Policies

- Office of Federal Procurement Policy
  - Proposed Policy on Green Purchasing
- USDA
  - Biobased Products for Federal Procurement
- General Services Administration
- Department of the Interior

# Office of Fed Procurement

- Fed Spends \$350 Billion per Year
- Off. Of Fed Procurement Policy
  - Key Role in Shaping Procurement Policies
- E.O. 13423
- Proposed Policy
  - Issued Dec. 28, 2007
  - Guidance on Green Procurement
  - Cleaning Products





# USDA Biobased Products

- Farm Security & Rural Investment Act
  - USDA designates biobased products
  - Fed procures biobased products
    - Renewable domestic agricultural materials
- New markets for agricultural products
- Biobased: more environmentally benign



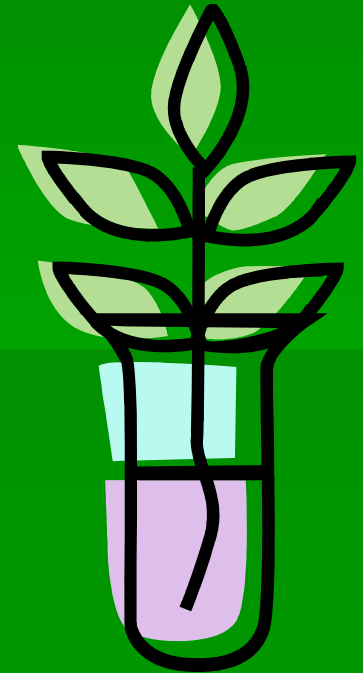
# USDA Biobased Products

- Cleaning Products
  - Bathroom Cleaners
  - Carpet and Upholstery Cleaners
  - Floor Strippers
  - Glass Cleaners
  - Graffiti and Grease Removers
  - Hand Cleaners, Sanitizers
- USDA to List Biobased Products
- Voluntary Biobased Label



# General Services Admin

- Procures Products for Fed Govt
- Promotes Purchase of Green Cleaners
  - Degreaser
  - Floor cleaner
  - General purpose cleaner
  - Glass cleaner
  - Graffiti remover
  - Toilet bowl cleaner



# Department of the Interior

- Responsible for Public Lands, Parks
- Promotes Green Cleaning
- National Park Service
- Main Interior Building



# Other

- EPA Office of Environmentally Preferable Purchasing
  - Greening Your Purchase of Cleaning Products
- Office of the Federal Environmental Executive



# NGOs

- Healthy Schools Campaign
- Hospitals for a Healthy Environment (H2E)
- U.S. Green Building Council



# Healthy Schools Campaign

- Quick and Easy Guide to Green Cleaning
- Proponent of Illinois Green Cleaning Legislation
- National Summit (Nov. 12)

# Hospitals for a Healthy Environment (H2E)

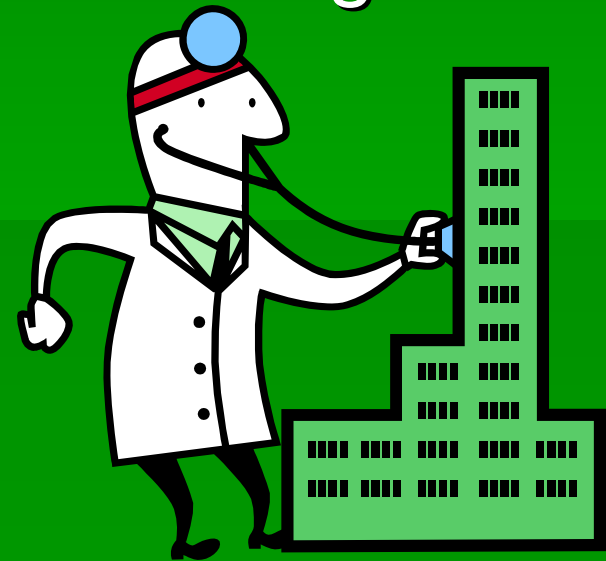
- Promotes Green Cleaning
- 10 Step Guide to Green Cleaning
- Green Product Directory





# US Green Building Council

- Promotes Green Buildings
- LEED-EBOM
- Target: Existing Commercial Buildings
- Green Cleaning
  - 40% of Points



# Supply Side Factors

- Regulatory Climate
  - Federal, State VOC Limitations
  - EU REACH
  - GHS
- Recognition Programs
  - EPA DfE SDSI
  - EPA DfE Formulator Program

# Thank You

## Questions

