GLOBAL SHOWS WEBINAR

The opportunities in the global cleaning industry

July 14th 9am – 10am CT | 3pm London time

Presented by ISSA and Informa Markets

Kim Althoff  
Senior Vice President, ISSA

Toni D’Andrea  
ISSA EMEA Director

Greg Hamilton  
EVP, Aviation, Agriculture and Infrastructure & Construction
THE OPPORTUNITIES IN THE GLOBAL CLEANING INDUSTRY

TONI D’ANDREA JULY 14 at 9:00 am CT, 3:00 pm London time
OPPORTUNITIES TO BE SEIZED

TONI D'ANDREA JULY 14th 9:00 am - 10 am CT, 3:00 pm London time
TIME – GLASS- LIGHT
COLD – SOUND- CLEAN
CLEANING IS NECESSARY FOR OUR SURVIVAL
GLOBALLY, THE PAST DECADE HAS SEEN MORE THAN 50 BILLION SQM OF NEW CONCRETE LAID: A NEW EMPIRE STATE BUILDING EVERY WEEK
IN THE NEXT 40 YEARS, 230 BILLION SQM OF NEW BUILDINGS WILL BE BUILT.
THE EQUIVALENT OF A NEW PARIS EVERY WEEK
THERE ARE TWO KEY DRIVERS PROPELLING THE PROGRESS OF THE CLEANING INDUSTRY:

1. RISING GLOBAL POPULATION
2. RATE OF MODERNIZATION
CONSIDER THE IMPORTANCE THAT PROFESSIONAL TRAINING AND QUALIFICATIONS WILL HAVE IN OUR INDUSTRY
MANUAL LABOUR, WHICH ACCOUNTS MORE THAN 80% OF TOTAL COST, WILL HAVE TO BE REDIRECTED TOWARDS CONTROL AND MANAGEMENT RATHER THAN EXECUTION
PRODUCTIVITY

IN WORLD OF AGRICULTURE BETWEEN 1700 AND 1890 PRODUCTIVITY INCREASED NINETY-FOLD.
BETWEEN 1950 AND 1985 GRAIN PRODUCTION INCREASED BY 193%.
IN 1928 NUMBER OF TRACTORS IN USE IN ITALY WAS 1,800,
IN 1997 IT WAS 1,700,000
PRODUCTIVITY

HOW? WHERE?
PRODUCTIVITY

EMERGING COUNTRIES WILL ENJOY THE ADVANTAGE OF BUILDING NEW PLACES WITH ACCESSIBILITY AND CLEANING SERVICES IN MIND. NEW MATERIALS ARE ABLE TO PREDICT THE PATTERN OF DIRT ACCUMULATION. SELF-CLEANING GLASS AND SENSOR-EQUIPPED SURFACES WILL BE TYPICAL FIXTURES IN NEW BUILDINGS

TONI D'ANDREA JULY 14 th 9:00 am - 10 am CT, 3:00 pm London time
PRODUCTIVITY

NOT OF ALL COUNTRIES WILL HAVE THE SAME EXPERIENCE:
IN ITALY FOUR OUT FIVE BUILDINGS DATE TO BEFORE YEAR 2000
AND ONE IN FIVE TO BEFORE 1919.
NEW TECHNOLOGIES WILL ENABLE US TO MECHANIZE CERTAIN
CLEANING PROCESSES IN WAY THAT WAS ONCE IMPOSSIBLE
THE SERVICE SECTOR AND THE CLEANING INDUSTRY IN PARTICULAR ARE UNIQUE IN THAT THEY MEET THE DEMANDS OF PUBLIC AND PRIVATE SECTOR ALIKE IN A MYRIAD OF DIFFERENT WAYS.
BEFORE COVID

AFTER COVID

TONI D'ANDREA JULY 14th 9:00 am - 10 am CT, 3:00 pm London time
HAND HYGIENE CAN PREVENT 40% OF INFECTIONS
THE INDUSTRY:

EUROPE HAS 290,000 CLEANING CONTRACTORS
4,000,000 WORKERS
TURN OVER OF 120 BILLION €
AVERAGE ANNUAL GROW OF 9% FOR THE LAST 25 YEARS
USA HAS 3.000.000 WORKERS
TURN OVER OF 80 BILLION €
AVERAGE ANNUAL GROW BETWEEN 2016 AND 2021 OF 5,7%
HIRING BY THE INDUSTRY IS EXPECTED TO INCREASE BY 4% BETWEEN NOW AND 2029
THE INDUSTRY:

CLEANING SERVICE INDUSTRY IS THE LARGEST EXPERIMENT IN SOCIAL AND CULTURAL INTEGRATION THAT ANY COUNTRY HAS EVER CARRIED OUT:

MORE THAN 70% OF WORKER ARE IMMIGRANTS
MORE THAN 70% ARE WOMEN
MORE THAN 70% ON THE SERVICE (IN EUROPE) ARE PROVIDING AT NIGHT
THE INDUSTRY:

CLEANING IS ALWAYS AN INVESTMENT NOT A COST
NEARLY 4 MILLION PEOPLE IN EUROPE CONTRACT HCAI.

OF THESE APPROXIMATELY 90,000 DIE
EVERY INFECTION COST THE NATIONAL HEALTH SYSTEM ANYWHERE BETWEEN €10.000 AND €36.000
FOR EVERY 1% INCREASE IN SPENDING ON CLEANING SERVICES INFECTION RATES FALL BY BETWEEN 0.12% AND 0.20%
A hospital that cut its cleaning budget by $58,000 would therefore end up incurring an additional and immediate-term cost of more than $100,000 as a result of increased infections.
CLEANING IS AN INVESTMENT BECAUSE A SAFE AND WELL RUN PROPERTY HAS A HIGHER VALUE
THE FUTURE
INTEGRATED PLANNING AND DESIGN

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SKILLS, COMPETENCIES AND TRAINING
THE FUTURE

RESPECT AND GRATITUDE

TONI D'ANDREA JULY 14th 9:00 am - 10 am CT, 3:00 pm London time
THANK YOU

TONI D'ANDREA JULY 14th 9:00 am - 10 am CT, 3:00 pm London time
A Global Partner for the Global Cleaning Community

July 14, 2022
Informa is a leading international intelligence, media, events and scholarly research group

<table>
<thead>
<tr>
<th>10,000+</th>
<th>£10B+</th>
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<tbody>
<tr>
<td>Employees Worldwide</td>
<td>Market Cap</td>
</tr>
<tr>
<td>30+</td>
<td>FTSE 100</td>
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<tr>
<td>Global Offices</td>
<td>London stock Exchange</td>
</tr>
<tr>
<td>#1</td>
<td>200+</td>
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<tr>
<td>Global B2B Events Company</td>
<td>Specialist Intelligence, Insights, &amp; Data</td>
</tr>
<tr>
<td>5.5 M+</td>
<td>500+</td>
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<tr>
<td>Annual Global Event Attendees</td>
<td>Leading B2B Exhibition Brands</td>
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Informa is a highly Global business

Teams in 30+ countries

Customers in 170 countries

Larger hubs and offices

**Americas**
- New York
- Washington DC
- Philadelphia
- Boston
- Chicago
- Toronto
- São Paulo
- Mexico City

**EMEA**
- London
- Colchester
- Oxford
- Manchester
- Amsterdam
- Paris
- Monaco
- Munich
- Istanbul
- Dubai
- Bahrain
- Johannesburg
- Cairo

**Australasia**
- Sydney
- Melbourne
- Auckland
- Tokyo
- Hong Kong
- Shanghai
- Beijing
- Guangzhou
- Hangzhou
- Singapore
- Jakarta

10,000+ Colleagues based worldwide
Supporting an expansive events portfolio

B2B events delivering for specialist markets all over the world
Well positioned to support the Global Cleaning Portfolio
Serving Specialized B2B Communities

Agriculture
Automotive
Aviation
Aerospace & Defense
Beauty
Biotech
Brand Licensing
Business Management
Commodities
Construction
Design Engineering
Education
Energy & Buildings
Engineering
Fashion
Finance
Fintech
Food & Nutrition
Government
Healthcare
Infrastructure
Internet of Things
Life Sciences
Live Design
Manufacturing
Maritime
Media
Medicine
Natural Products
Pharma
Pop Culture
Real Estate
Sustainability
Technology
Telecommunications
Television
Transportation
Waste Management
And So Much More…
Informa Audience Database

Over 1.45 million contacts representing nearly 700,000 facilities globally

<table>
<thead>
<tr>
<th>Category</th>
<th>Audience</th>
<th>Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airports &amp; Airlines</td>
<td>37,798</td>
<td>20,212</td>
</tr>
<tr>
<td>Commercial Offices</td>
<td>954,677</td>
<td>446,875</td>
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<tr>
<td>Convention Centers</td>
<td>4,089</td>
<td>3,525</td>
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<tr>
<td>DMOs &amp; CVBs</td>
<td>286</td>
<td>224</td>
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<tr>
<td>Entertainment Venues</td>
<td>8,019</td>
<td>5,894</td>
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<tr>
<td>Healthcare &amp; Aged Care</td>
<td>126,581</td>
<td>57,697</td>
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<tr>
<td>Higher Education</td>
<td>65,748</td>
<td>25,219</td>
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<tr>
<td>Hospitality</td>
<td>74,482</td>
<td>46,553</td>
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<tr>
<td>Retail</td>
<td>176,067</td>
<td>87,149</td>
</tr>
<tr>
<td>Stadiums &amp; Arenas</td>
<td>2,636</td>
<td>1,348</td>
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</table>

**Total Audience:** 1,450,383  
**Total Locations:** 694,696
Thank You

Greg Hamilton
Executive Vice President
Agriculture, Aviation, Infrastructure & Construction
25-27 August 2022, Nanjing  
14-16 December 2022, Shenzhen  
28-31 March 2023, Shanghai

Why you should exhibit at China Clean Expo?

• China has great potential for modern cleaning services and products
• CCE is the biggest cleaning show in China with 20+ years history
• Co-located with Hotel & Shop Plus - China’s leading hospitality and commercial space event
• CCE 2021 gathered 400+ exhibitors and 120,000+ buyers
• Reach to China market through show organizer’s B2B website www.QJGLE.com
From August 31 to September 2, 2022, at Centro Citi Banamex in Mexico City.

16,000 buyers on the show floor

REGISTRATION OPEN HERE

Visit our webpage:
https://pavilion.issa.com/
THE ONE SHOW FOR THE PROFESSIONAL CLEANING INDUSTRY

15,000 Participants
Meet new suppliers and partners, reconnect with industry colleagues and see your competition as visitors come from around the world and across sectors for this premier event.

600+ Exhibitors
Representing over 60+ countries and covering the entire supply chain, our exhibitors are ready to showcase their innovations and provide solutions to our industry’s greatest challenges.

100+ Education Session
You’ll discover the latest industry advancements, hear from top industry experts and experience live demonstrations of the newest technologies on the show floor!

75+ Years of History
Whether you're looking to for new products or services, network with industry professionals, gain insights, or see what the competition is offering, The ISSA SHOW has it all during this four-day event! In partnership with ISSA, the association is leading the way to elevate the industry and advancing clean and driving innovation.

Show Registration Opens July 2022
www.issashow.com
The value of Memory and the building of a civil conscience

Designing for occupational health and safety

Integrated services management under the “new normal”
**Issa Pulire** is the tradeshow for the professional cleaning sector that plays host to a complete range of machinery, chemical products, equipment and components for indoor and outdoor spaces.

**TRADE SHOW VALUE CREATION**

- **International event**
- **Co-Location**
  - Tutto Food
- **Co-Hosted event**
  - Disinfestando

**ORGANIZED BY:**

**LOCATION:**
Why exhibit at ISSA Pavilion?

1. Asia’s largest gathering of Foodservice & Hospitality industry Suppliers and Buyers
2. Meet over 10,000 C-level Buyers from 100 countries / regions
3. *Strong rebound in Southeast Asia Tourism expected in 2022 with a forecast of USD1.5 billion in hotel investment volume for 2022
4. *The increasing demand on maintaining clean and hygienic environment driven by the lifting of restrictions and lockdowns across countries and a return to normal day-to-day activities in Asia. The market in Asia Pacific was valued at USD 4.1billion in 2020 and is projected to register a CAGR of over 11.0% over the forecast period

Sources from:
(2) FHA2018 Post show report
(3) Hospitalitynet
(4) Grand View Research
# HIGHLIGHTS

<table>
<thead>
<tr>
<th>Why ISSA India</th>
<th>Cleaning &amp; Hygiene Products “The Next Big Need in India’s Facility Management World”</th>
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<tbody>
<tr>
<td>Govt initiatives</td>
<td>The revolutionary “Clean India Mission” leading to increased demand of Cleaning &amp; Hygiene products</td>
</tr>
<tr>
<td>Growing Economy</td>
<td><strong>India's</strong> GDP is set to grow at 6.4 per cent in 2022, making it the fastest-growing major economy in the world. According to the latest data by the United Nations (UN), the country will grow at 6.4 per cent, down from 8.8 per cent in 2021</td>
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<td>Growing Infrastructure</td>
<td>Country is all set to develop 90 cities into “SMART CITIES”. India is becoming the hub for most of the big Corporate head quarters for Asia region.</td>
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<td>ISSA Show &amp; Conference 2022</td>
<td>Expo &amp; High-level Conferences brings together the industry leaders and professionals on a common networking platform to share knowledge, innovations, developments, solutions &amp; experiences</td>
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whi invest in Nigeria?

Nigeria: the most populous country in the African continent

Value of the Nigerian facility management industry
$8446 million in 2019 → $12.662 million by 2027
CAGR (compound annual growth rates):
6.4% from 2020 to 2027

Africa’s largest economy with GDP (gross domestic product) of $440 bn
Third host economy for FDI (foreign direct Investment) in Africa

Fast-growing country
Hospitality industry: +20% in 2018
expected to grow even further in the next 5 years

Co-located with RAW Expo Africa
dedicated to recycling and waste management

Need for modern cleaning tools
and processes
Thank you for attending!