ISSA | ALTUS COLLECTIVE

EDITION 02

BSC MARKET INTELLIGENCE

Commercial Floor Care

How the shift to LVT, PFAS restrictions, and rising chemical and equipment costs are changing floor-care pricing and revenue.

The strip-and-wax floor is disappearing. The floor-care revenue model has to change with it.

LVT has overtaken VCT as the dominant resilient flooring category. At the same time, PFAS restrictions, chemical cost pressure, machinery inflation, and slip-risk exposure are changing how BSCs price, document, and deliver floor care.

COVER STAT

36:1

LVT sales versus VCT sales in the United States in 2024.

EVIDENCE — INDUSTRY MARKET INTELLIGENCE.

AUDIENCE

BSC executives, operations leaders, floor-care specialists, procurement leaders, and facility managers.

CORE THESIS

Material mix, PFAS restrictions, chemical inflation, machinery costs, and safety exposure are reshaping floor-care economics. BSCs must replace reliance on legacy VCT work with material-specific floor-performance services, compliant chemistry, mechanized productivity, and documented safety outcomes.

KEY FIGURES

$7.19B in 2024
U.S. LVT SALES
INDUSTRY INTELLIGENCE

$0.20B in 2024
U.S. VCT SALES
INDUSTRY INTELLIGENCE

+5.2% in 12 months to August 2026
CHEMICAL PRICE CHANGE
PUBLIC DATA

+33.5% since January 2020
COMMERCIAL MACHINERY PRICE CHANGE
PUBLIC DATA

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04	REVENUE MIGRATION	The old floor-care revenue stream is being replaced—not eliminated
05	PFAS AND CHEMISTRY COMPLIANCE	Floor chemistry is now a compliance issue
06	MARGIN PRESSURE	Cost escalation without contract escalation is a silent loss
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08	FLOOR SAFETY	Safety is an underused floor-care sales argument

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13 figures in this edition. Figures tagged **Altus analysis** are arithmetic derived from the cited sources; figures tagged **Illustration** use stated assumptions and are not forecasts.

Floor-care equipment: a $4–6B global market growing 5–10% a year

Four independent forecasts put today's floor-scrubber and floor-care equipment market between $3.6B and $5.7B, rising to $5.8B–$8.3B by 2030. Every source agrees on direction; they disagree on pace. Growth is concentrated in robotic and healthcare applications, walk-behind machines still dominate revenue, and North America remains the largest regional market.

FIGURE 02.1

MARKET DATA

Market at a glance

$5.67B
Global floor-scrubber market, 2025 (M2)

7.9%
Projected CAGR, 2025–2030 (M2)

$1.1B
U.S. floor-scrubber market, 2024 (M3)

33.4%
North America share of industrial scrubber market, 2020 (M5)

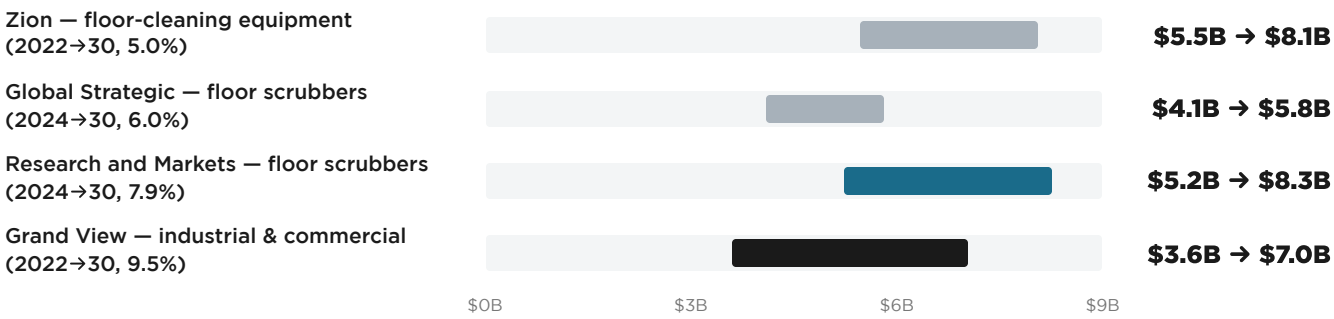
Source — Research and Markets (M2–M3); Vision Research Reports (M5)

FIGURE 02.2

INDUSTRY INTELLIGENCE

Every forecast points up — the pace varies

Market size in base year → 2030 forecast, by source and scope.



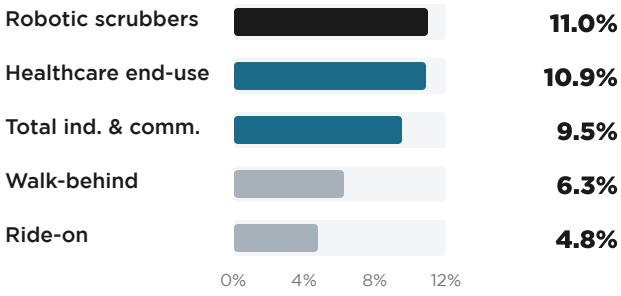
Source — M1–M4

FIGURE 02.3

INDUSTRY INTELLIGENCE

Growth by segment, CAGR to 2030

Grand View (robotic, healthcare, total) and Global Strategic (walk-behind, ride-on) use different scopes.



Source — Grand View (M4); Global Strategic (M3)

FIGURE 02.4

Walk-behinds remain c. 78% of 2030 scrubber revenue

Global Strategic 2030 forecast: $5.8B total.



- **Walk-behind scrubbers & polishers** — $4.5B · 77.6%
- **Ride-on and other** — $1.3B · 22.4%

Source — Global Strategic via Research and Markets (M3)

FIGURE 02.5

ALTUS ANALYSIS

What it implies

1.9×
Grand View market growth, 2022 to 2030 ($3.6B → $7.0B)

6.2 pts
Growth gap between robotic (11.0%) and ride-on (4.8%) scrubbers

c. 27%
U.S. share of the global floor-scrubber market in 2024 ($1.1B of $4.1B)

Source — Altus analysis of M1–M5

MARKET DRIVERS SCORECARD

DRIVER	DIRECTION	SIGNAL STRENGTH	READ-THROUGH FOR BSCS	EVIDENCE
Robotic scrubber adoption	Accelerating	High	Fastest-growing machine type; plan fleet mix before clients specify it	INDUSTRY INTELLIGENCE
Healthcare demand	Accelerating	High	Fastest end-use; infection-control specs travel with floor programs	INDUSTRY INTELLIGENCE
Equipment price inflation	Rising	High	Machinery prices up 33.5% since 2020 — fund replacement reserves	PUBLIC DATA
Shift from VCT to LVT	Structural	High	Strip-and-wax revenue gives way to maintenance chemistry and auditing	INDUSTRY INTELLIGENCE

Market Monitor sources

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M2 Research and Markets, Floor Scrubbers Market — Global Forecast 2025–2030. https://www.researchandmarkets.com/reports/6016564/floor-scrubbers-market-global-forecast

M3 Research and Markets, Floor Scrubbers — Global Strategic Business Report. https://www.researchandmarkets.com/report/floor-scrubber

M4 Grand View Research, Industrial & Commercial Floor Scrubbers Market Report, 2030. https://www.grandviewresearch.com/industry-analysis/industrial-commercial-floor-scrubbers-market

M5 Vision Research Reports, Industrial Floor Scrubber Market. https://www.visionresearchreports.com/industrial-floor-scrubber-market/38223

Five shifts changing floor-care economics

INDUSTRY INTELLIGENCE

$7.19B in 2024

U.S. LVT SALES

COMMERCIAL IMPACT
LVT care is now a core service opportunity

INDUSTRY INTELLIGENCE

$0.20B in 2024

U.S. VCT SALES

COMMERCIAL IMPACT
Legacy strip-and-wax dependence is structurally exposed

PUBLIC DATA

+5.2% in 12 months to August 2026

CHEMICAL PRICE CHANGE

COMMERCIAL IMPACT
Fixed-price supply assumptions can erode margin

PUBLIC DATA

+33.5% since January 2020

COMMERCIAL MACHINERY PRICE CHANGE

COMMERCIAL IMPACT
Replacement, leasing, and purchase timing matter

INDEPENDENT RESEARCH

$10.5B annual employer cost

SAME-LEVEL FALLS

COMMERCIAL IMPACT
Floor safety supports a financial-risk sales case

PUBLIC/STATE DATA

Active and expanding across states

PFAS RESTRICTIONS

COMMERCIAL IMPACT
Product documentation is becoming a procurement requirement

FIGURE 02.6 — INDUSTRY INTELLIGENCE

U.S. resilient flooring sales, 2024



Source — Floor Covering News (Source 1)

FIGURE 02.7

LVT is 97% of the combined category

Share of combined LVT + VCT sales, 2024 — the 36:1 ratio on the cover.

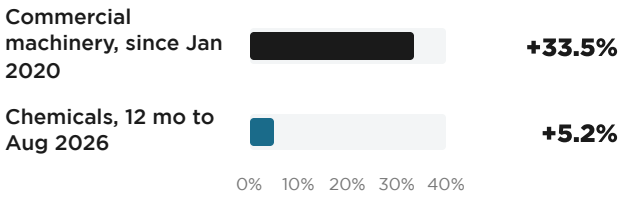


Source — Floor Covering News (Source 1) · Altus analysis

FIGURE 02.8

PUBLIC DATA

Input-cost inflation



Source — BLS PPI via FRED (Sources 3–5)

FIGURE 02.9

ALTUS ANALYSIS

What it implies

36×

LVT sales dollars for every VCT dollar in 2024

c. 4.5%/yr

Implied compound machinery price increase since Jan 2020 (c. 6.6 years)

$10.5B

Annual U.S. employer cost of same-level falls

Source — Altus analysis

THE SIGNAL

Floor care is shifting from a labor-and-wax task to a material-specific, compliance-aware, safety-linked service line.

The floor is no longer one service category

FLOOR TYPE	COMMON SETTINGS	LEGACY SERVICE MODEL	MODERN OPPORTUNITY	KEY RISK
VCT	Schools, older healthcare, public buildings	Strip, wax, burnish, recoat	Restoration and documented maintenance	Declining installed base
LVT/LVP	Office, retail, healthcare, multifamily	Generic hard-floor care	LVT-specific cleaning, coating, repair, appearance protection	Damage from wrong chemistry or pads
Polished concrete	Industrial, retail, logistics	Periodic cleaning and burnishing	Mechanized care, stain control, safety verification	Underpriced appearance expectations
Rubber	Healthcare, education, transit	Specialty periodic cleaning	Manufacturer-aligned care programs	Chemistry compatibility
Epoxy/resin	Manufacturing, labs, back-of-house	Heavy scrub/degrease	Safety, soil control, contamination support	Wear and chemical exposure
Carpet tile	Office, education, hospitality	Extraction and spotting	Appearance management and predictive replacement	Occupancy affects demand

RECOMMENDED VISUAL

Floor Portfolio Matrix. Map installed floor type by revenue today, revenue risk, and service-growth potential.

The old floor-care revenue stream is being replaced—not eliminated

LEGACY REVENUE LINE	REVENUE PRESSURE	REPLACEMENT OPPORTUNITY
Full strip-and-wax	Lower VCT share	LVT restorative cleaning and protective-care plans
Reactive spot work	Client price resistance	Scheduled floor-condition audits and corrective care
Mop-and-bucket hard-floor care	Labor inefficiency	Mechanized scrubber programs with proof of coverage
Generic chemical charges	Procurement commoditization	Compliance-certified chemistry and dilution-control programs
One-off safety response	Often unpriced	Slip-resistance, matting, drying-time, and incident-response packages

WHAT TO SELL

Floor Performance Program

- Surface inventory and condition baseline
- Daily and periodic mechanized process
- Quarterly floor-condition report
- Material-specific chemistry and maintenance standard
- Slip-risk and drying-time protocol
- Optional PFAS/compliance documentation

REVENUE-MIGRATION EQUATIONS

Revenue at risk = VCT periodic-floor revenue × Projected VCT reduction rate

Replacement-service opportunity = LVT square footage × Annual LVT-care service rate

Floor chemistry is now a compliance issue

A national product cannot automatically be assumed compliant in every state. Maintain current product documentation and verify state-specific requirements before purchasing or deploying floor finish, polish, stripper, sealer, and related chemistry.

REQUIRED DOCUMENTATION FILE

- Product name and SKU
- PFAS-free statement or manufacturer disclosure
- State-specific sale/use eligibility
- Account and facility list showing product deployment
- Safety Data Sheet and technical data sheet
- Safer Choice and/or Green Seal certification where applicable
- Dilution and application instructions

WHAT TO MEASURE

- Percentage of floor-care SKUs with current PFAS documentation
- Accounts located in active restriction states
- Average time to substitute a product after a compliance change
- Purchase volume under documented compliant chemistry

USE MONDAY MORNING

Send your top suppliers a standardized request for PFAS, ingredient, certification, and state-compliance documentation.

Cost escalation without contract escalation is a silent loss

Use an input-cost dashboard that tracks chemical, sanitary-tissue, machinery, transportation, and labor-cost movements. The Bureau of Labor Statistics PPI program measures the average change over time in selling prices received by domestic producers and is the appropriate official source for recurring input-cost monitoring.

ILLUSTRATION — REPLACE WITH ACTUAL ACCOUNT SPEND

INPUT	ANNUAL ACCOUNT SPEND	ANNUAL INCREASE	UNRECOVERED COST WITHOUT ESCALATION
Chemicals and floor finish	$70,000	5.2%	$3,640
Paper and sanitary supplies	$50,000	4.0%	$2,000
Equipment replacement reserve	$30,000	6.0%	$1,800
Total annual margin exposure	**$150,000**	**—**	**$7,440**

FIGURE 02.10

ILLUSTRATION

Where the $7,440 margin exposure comes from

Unrecovered annual cost by input, on $150,000 of illustrative account spend.



- **Chemicals & floor finish** — $3,640 · 48.9%
- **Paper & sanitary supplies** — $2,000 · 26.9%
- **Equipment replacement reserve** — $1,800 · 24.2%

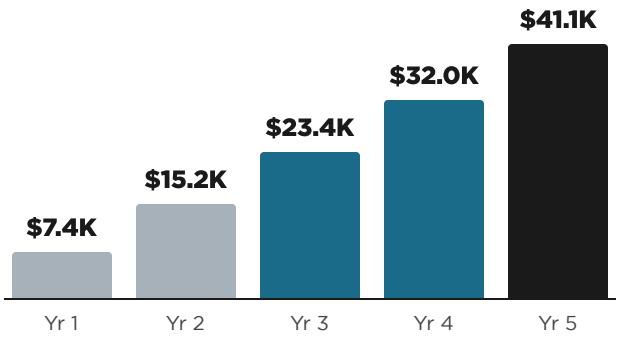
Source — Altus illustration from the table above

FIGURE 02.11

ILLUSTRATION

The loss compounds on a fixed-price term

Unrecovered cost by contract year if the 4.96% blended increase repeats annually.



Source — Altus analysis — illustrative, not a forecast

FIGURE 02.12

ALTUS ANALYSIS

Escalation math

4.96%

Blended input-cost increase across the $150,000 spend

c. $119K

Cumulative unrecovered cost over a five-year term with no escalation clause

Source — Altus analysis

Annual unrecovered cost = Annual supply spend × Input-cost increase

COMMERCIAL ACTION

Standardize escalation clauses, material-change clauses, and documented pass-through schedules in every multi-year contract.

Machines do not replace people. They change the labor equation.

TOOL	BEST USE	WHAT IT IMPROVES	WHAT CAN GO WRONG
Walk-behind scrubber	Large repeatable hard-floor areas	Coverage rate, consistency, operator fatigue	Weak route planning and underuse
Ride-on scrubber	Warehouses, airports, campuses	High productivity across large footprints	Oversized equipment for constrained spaces
Orbital machine	Restorative work, grout, detailed surfaces	Surface recovery with lower chemical use	Overpromised labor reduction
Burnisher	VCT and select finish systems	Appearance and gloss	Misfit for LVT-heavy portfolio
Autonomous scrubber	Large daily routes	Labor capacity and proof of work	Idle assets and high intervention burden
Dilution control	Multi-site chemistry programs	Consistency, cost control, and safety	Weak training and refill discipline

DECISION RULE

Select equipment after documenting surface type, square footage, frequency, route, labor standard, client outcome, and maintenance capacity.

Safety is an underused floor-care sales argument

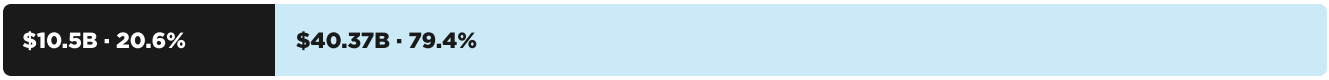
Falls on the same level carry an estimated annual employer cost of $10.5 billion in the United States. Floor-care programs should address appearance, productivity, and documented risk control.

FIGURE 02.13

INDEPENDENT RESEARCH

Same-level falls are one-fifth of the serious-injury bill

Share of the $50.87B U.S. employers spend each year on the top ten causes of serious workplace injuries.



Falls on same level	$10.5B · 20.6%
Other top-ten causes	$40.37B · 79.4%

Source — Liberty Mutual 2025 Workplace Safety Index (Source 9) · Altus analysis

SELL A FLOOR SAFETY ASSURANCE PACKAGE

- Surface-condition review
- Machine, pad, and chemistry validation
- Wet-floor communication standard
- Optional slip-resistance testing where appropriate
- Cleaning and drying-time protocol
- Entryway and matting review
- Incident-response documentation
- Quarterly risk review

CLIENT MESSAGE

Your floor-care program should reduce uncertainty around slips, claims, guest experience, and operational disruption—not merely improve shine.

Vertical sales playbook

VERTICAL	FLOORING REALITY	BEST OFFER	PROOF POINT
K–12 and higher education	VCT, LVT, heavy traffic	VCT restoration plus LVT maintenance transition plan	Condition score and summer-project forecast
Healthcare	Rubber, LVT, sheet goods	Material-specific care and compliant chemistry	Infection-control alignment and product documentation
Industrial/logistics	Concrete, epoxy, oil/soil exposure	Mechanized floor productivity and safety program	Sq. ft./hour and safety measures
Retail	LVT, polished concrete, entryway exposure	Customer-experience floor program	Appearance audits and store-ready score
Office	LVT, carpet tile, stone common areas	Occupancy-based floor maintenance	Tenant/common-area condition score
Airports/venues	High-traffic resilient floors and stone	Peak-period mechanized coverage	Route completion and visible-cleanliness data

90-day action plan and sources

90-day action plan

01 Create a floor inventory for the top 20 accounts by annual revenue.

02 Calculate annual revenue tied to VCT strip-and-wax activity.

03 Identify every LVT account without a named LVT-care program.

04 Build a product-compliance file for every floor-care SKU.

05 Compare 12 months of supply, equipment, and labor inflation with contract terms.

06 Select five sites for mechanized-productivity pilots.

07 Launch a quarterly floor-condition report for top clients.

EXECUTIVE KPIS

- Percentage of floor-care revenue tied to legacy VCT services
- Revenue from LVT, restorative, safety, and compliance services
- Percentage of contracts with supply-cost escalation protection
- Percentage of SKU portfolio with current compliance documentation

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Methodology note

All product restrictions, product claims, and PPI values must be reconfirmed immediately before publication. State requirements change. Illustrations use stated assumptions and are not forecasts.