Market Highlights
Cleaning & Hygiene Product Basket
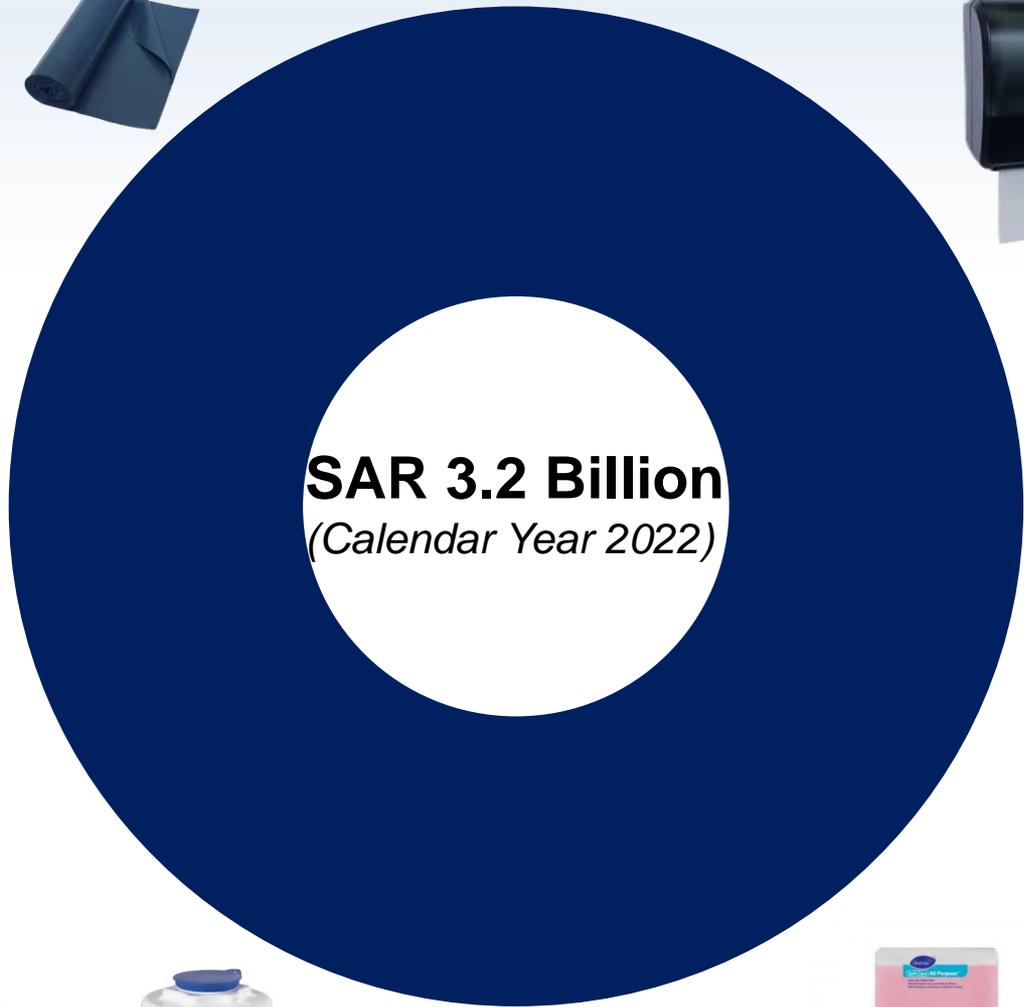
January 2023

PRECISION

Market Size
Total Cleaning & Hygiene Product Basket

SAR 3.2 Billion
(Calendar Year 2022)

See Slides 7-9 for Scope and Definitions

Confidential

PRECISION

Market Size
By Product Category – millions (SAR)

Pie chart centered on: **SAR 3.2 Billion** *(Calendar Year 2022)*

Categories:
- Other SAR 63
- Towels SAR 269
- Bath Tissue SAR 206
- Cleaning Chemicals SAR 634
- Skin Care SAR 253
- Dry Wipers SAR 95
- Wet Wipers SAR 32
- Laundry & Warewash SAR 444
- Powered Equipment SAR 507
- Non-Powered Equipment SAR 412
- Can Liners SAR 253

See Slides 7-9 for Scope and Definitions

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PRECISION

Market Size

By Customer Segment/Vertical – millions (SAR)

SAR 3.2 Billion
(Calendar Year 2022)

- All Other SAR 399
- Healthcare SAR 593
- Industrial / Manufacturing SAR 570
- Office SAR 425
- Restaurants & Catering SAR 375
- Education SAR 171
- Retail SAR 163
- High Traffic SAR 147
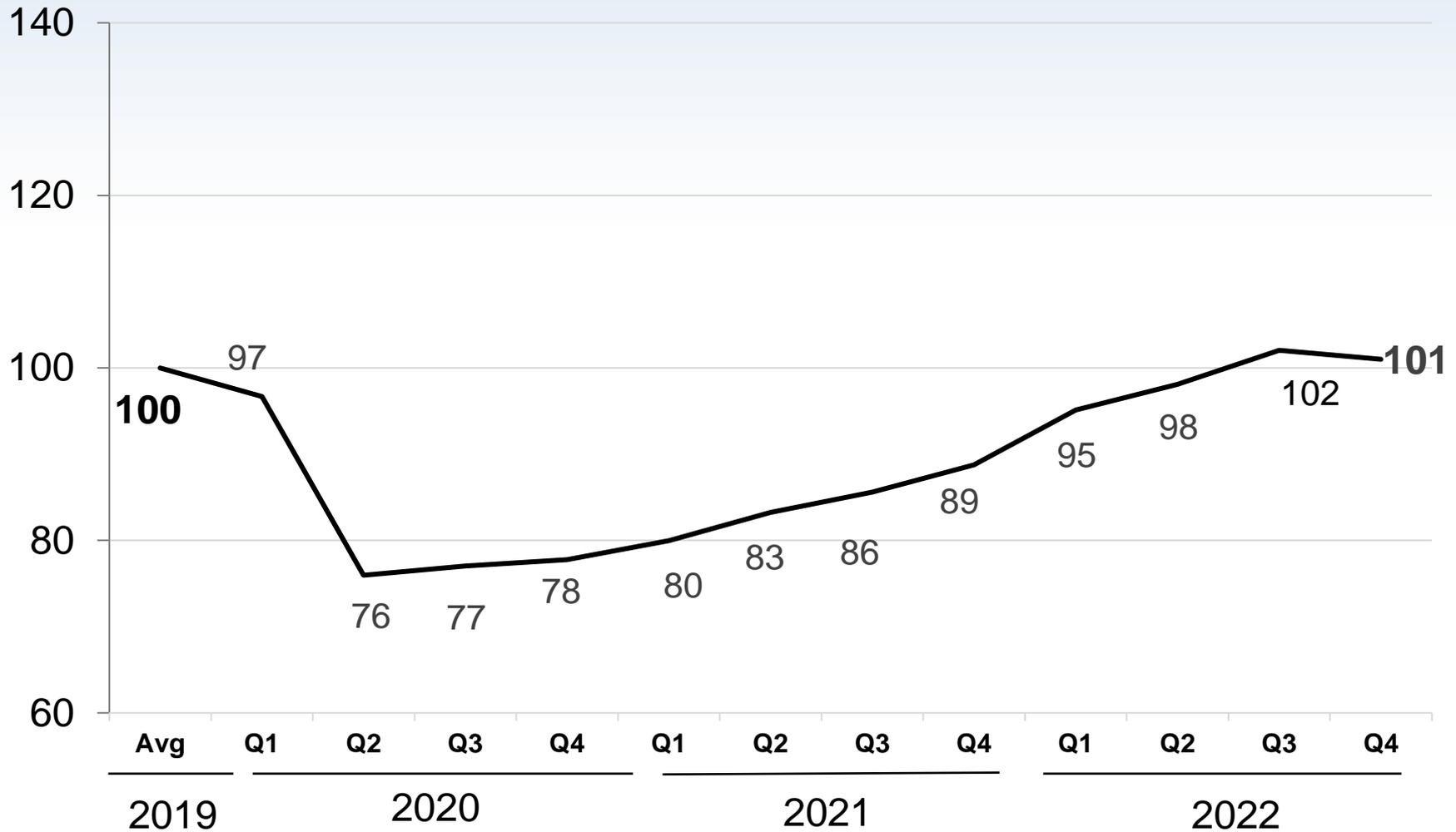- Grocery SAR 95
- Lodging SAR 229
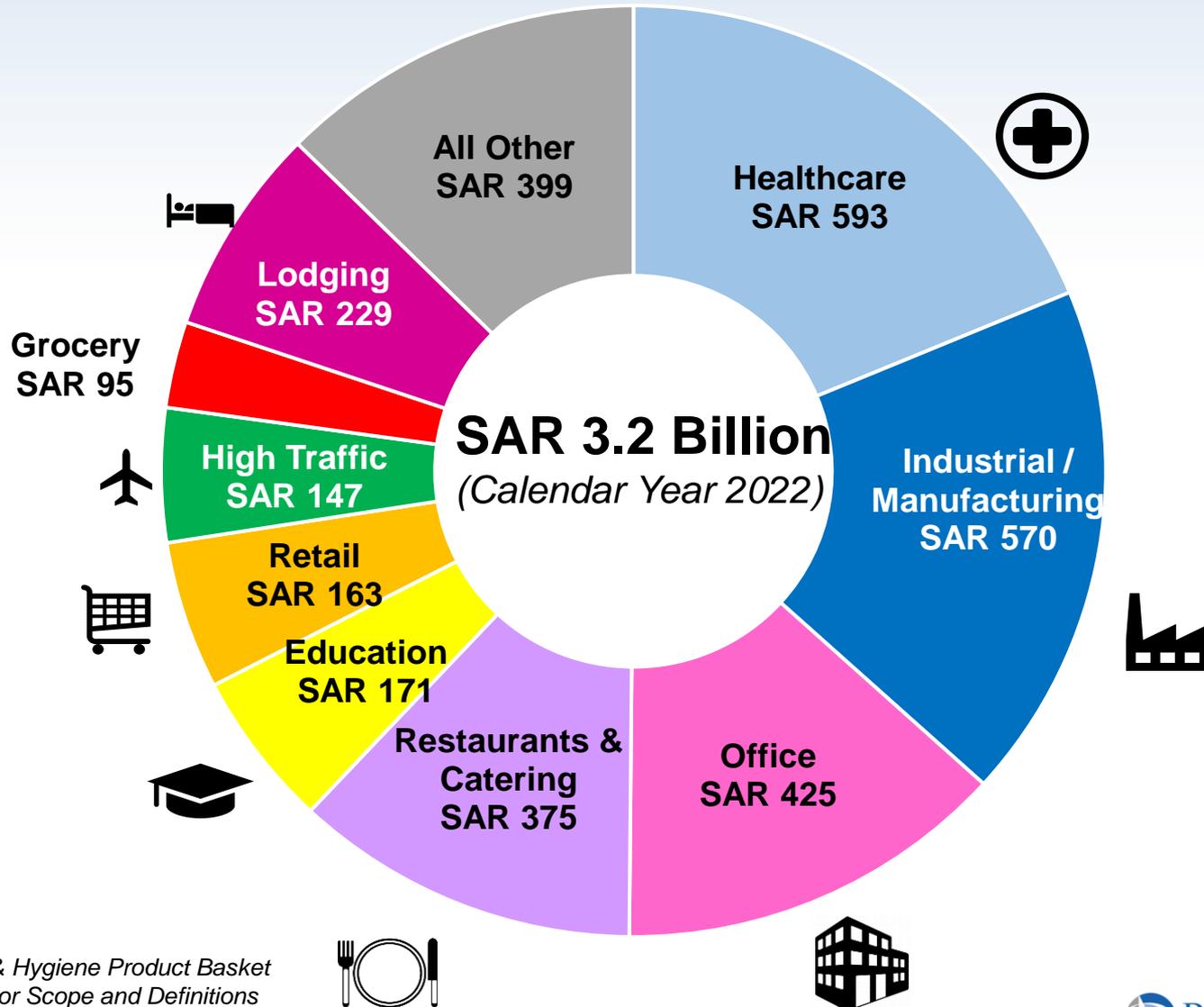
Total Cleaning & Hygiene Product Basket
See Slides 7-9 for Scope and Definitions
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PRECISION

Net Sales (including volume & price)
Total Cleaning & Hygiene Product Basket

Data points:
- 2019 Avg: 100
- 2020 Q1: 97
- 2020 Q2: 76
- 2020 Q3: 77
- 2020 Q4: 78
- 2021 Q1: 80
- 2021 Q2: 83
- 2021 Q3: 86
- 2021 Q4: 89
- 2022 Q1: 95
- 2022 Q2: 98
- 2022 Q3: 102
- 2022 Q4: 101

See Slides 7-9 for Scope and Definitions

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PRECISION

Other Market Insights
Available Upon Request – for example:

- By Category by quarter (slide 3)

  o Customized Categories & Subcategories

- By Customer Segment/Vertical by quarter (slide 4)

  o Customized Segments/Verticals & Subsegments/Subverticals

- Growth split between volume and price (slide 5)

  o By Category and Segment/Vertical

- Other market details as requested

PRECISION

Scope and Definitions

- B2B Professional Market, Away from Home (Excludes Consumer Purchases)

- All Distribution Channels, including Retail/C&C and eCommerce Pure Plays

- Customer Riyals (from Distributor to Customer) in Millions. Includes distributor mark-up

- Market Size: January – December 2022 (12 months)

- Geography = Saudi Arabia

- Excludes Exports

PRECISION

Category Definitions

Towels	Rolled and folded disposable paper towels. May be used with a wall-mounted dispenser or placed upright on a flat surface. Excludes Kitchen Roll Towels (KRT)
Bath Tissue	Single & jumbo rolled, folded, and coreless & centrefeed bath tissue
Cleaning Chemicals	Cleaning & disinfecting liquids, ready-to-use, concentrates, dilution control systems, hard floor care, other chemicals
Skin Care	Hand soap & sanitizer, moisturizer, industrial cleaner, and protectant
Dry Wipers	General purpose paper and general & specialized non-woven wipers Excludes rags & shop towels, couch covers, microfibers, and pre-saturated/treated wipers
Wet Wipers	Germicidal, disinfecting, general purpose, and foodservice pre-saturated wipers intended for hard surfaces. Excludes Wipers intended for use on skin.
Laundry & Warewash	Commercial & non-commercial laundry & warewash chemicals
Powered Equipment	Vacuums, carpet extractors, sweepers, scrubbers, burnishers/floor machines, electrostatic sprayers, and others
Non-Powered Equipment	Floor pads, mops, buckets, scrapers, carts, dusters, waste receptacles, mats & matting, and others
Can Liners	Garbage bags, high & low-density liners, specialty liners

PRECISION

Customer Segment/Vertical Definitions

Healthcare   Acute care (for example: hospitals), long-term care (for example: care homes), primary care, and all other healthcare facilities

Restaurants & Catering   Commercial restaurants, non-commercial restaurants, and managed services.

Industrial   Facilities that manufacture, transform, & process items including food processing.

Office   Office buildings in industries such as finance, Information Technology, legal, consulting, and others.

Education   All public, private, and non-traditional institutions that educate students.

Retail (not for resale)   Non-grocery retailers (not for resale)

High Traffic   High-traffic locations where patrons are present for a specific event such as airports, stadiums, theaters, churches, and others

Lodging   Includes temporary lodging and travel accommodations.

Grocery   Includes grocery (not for resale)

All Other   Includes non-office government such as prisons, oil & gas, mining, agriculture, and others

PRECISION

Precision Syndicated Market Insights

- B2B Data Feeds (transactional point-of-sale data)
    - 300+ unique data sources
    - SAR 13 billion+ ($4 billion USD+) per month
    - 380 million+ sales invoice transactions annually
    - 14 million+ ship-to locations annually
- 20+ years industry experience

Europe		North America	South America	Asia	Oceania	Africa
Germany	Slovakia	USA	Brazil	India	Australia	South Africa
France	Switzerland	Canada	Colombia	China	New Zealand	Egypt
UK	Ireland	Mexico	Peru	Thailand		Nigeria
Italy	Belgium		Chile	UAE		Morocco
Spain	Netherlands		Argentina	Israel		Others
Portugal	Poland		Others	Saudi Arabia		
Greece	Czech Republic			South Korea		
Turkey	Others			Indonesia		
				Others		

PRECISION