



2023 STATE OF THE DRY CLEANING INDUSTRY REPORT

924 RESPONDENTS

HOW'S BUSINESS?

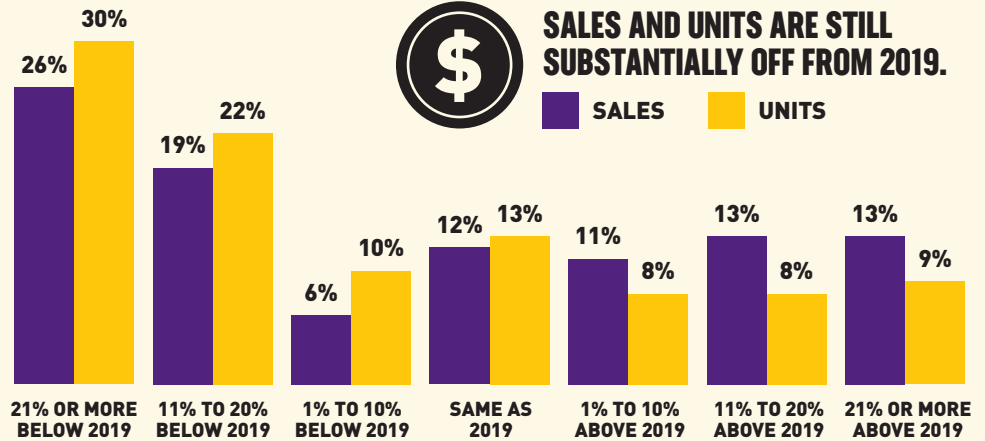
51%

of dry cleaners in the U.S. are reporting sales are still off from 2019.



SALES AND UNITS ARE STILL SUBSTANTIALLY OFF FROM 2019.

SALES UNITS



MANY DRY CLEANERS HAVE EXPERIENCED A SIGNIFICANT IMPACT ON THEIR OVERALL PROFIT.

27%

PROFITS SIGNIFICANTLY BELOW 2019

24%

PROFITS SOMEWHAT BELOW 2019

18%

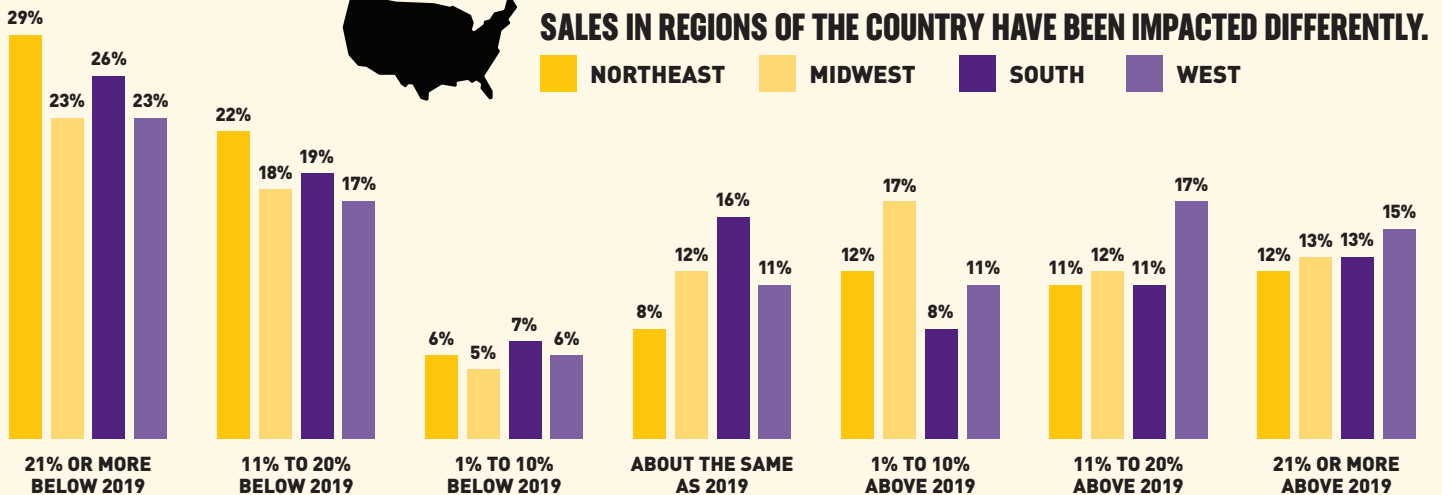
PROFITS ABOUT THE SAME AS 2019

16%

PROFITS SOMEWHAT ABOVE 2019

15%

PROFITS SIGNIFICANTLY ABOVE 2019



GARMENT PRICES AND TRENDS.

AVERAGE PRICES ACROSS THE U.S. FOR VARIOUS GARMENTS.

\$369

Average price across the U.S. for a **LAUNDERED SHIRT**

\$756

Average price across the U.S. for a **BLOUSE**

\$765

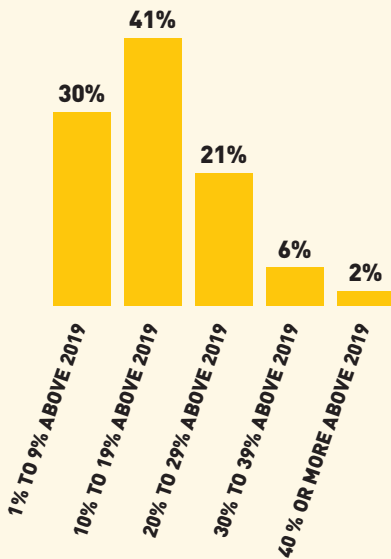
Average price across the U.S. for **PANTS**

\$788

Average price across the U.S. for a **SWEATER**

83%

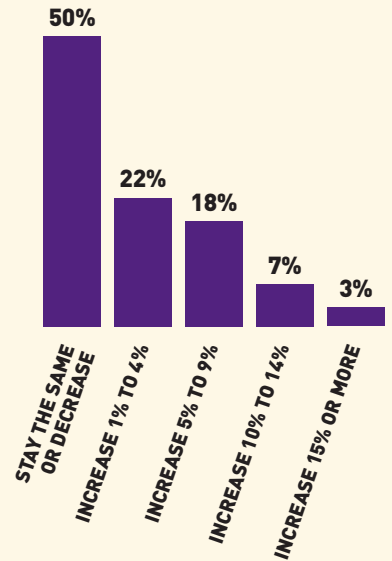
AMOUNT OF OVERALL PRICE INCREASES FROM 2019 TO 2023.



WITH THE COST OF EVERYTHING GOING UP, MOST DRY CLEANERS HAVE BEEN FORCED TO RAISE PRICES.

Percent of dry cleaners reporting if they have raised prices since 2019.

DRY CLEANERS EXPECTING TO RAISE PRICES BEFORE THE END OF 2023.



AVERAGE PRICES ACROSS THE U.S. FOR VARIOUS GARMENTS.

\$1075

Average price across the U.S. for a **SPORT COAT**

\$1719

Average price across the U.S. for a **2-PIECE SUIT**

\$1399

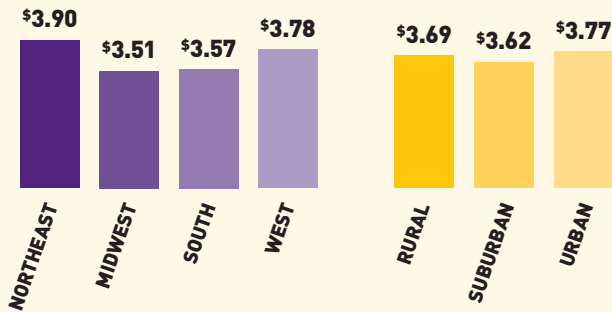
Average price across the U.S. for **PLAIN DRESS**

\$3669

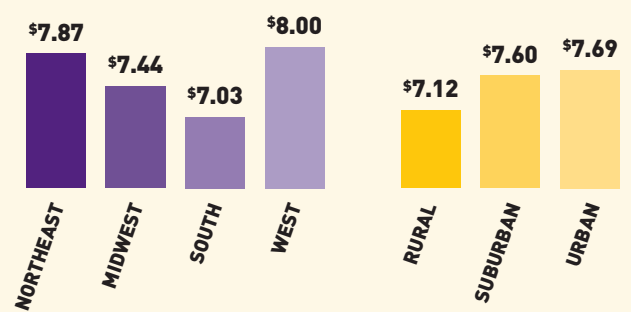
Average price across the U.S. for a **QUEEN COMFORTER**

GARMENT PRICES BY REGION AND LOCATION.

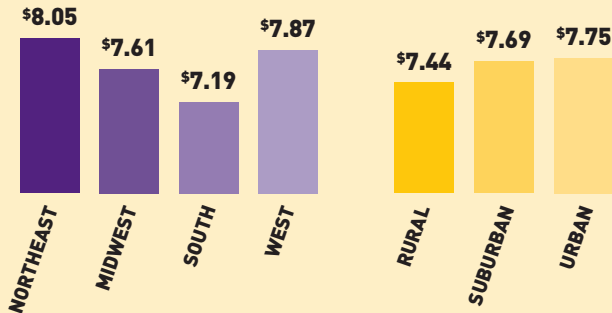
AVERAGE PRICE ACROSS THE U.S. FOR A LAUNDERED SHIRT



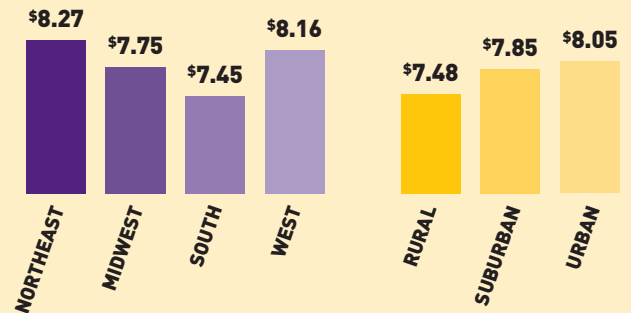
AVERAGE PRICE ACROSS THE U.S. FOR A BLOUSE



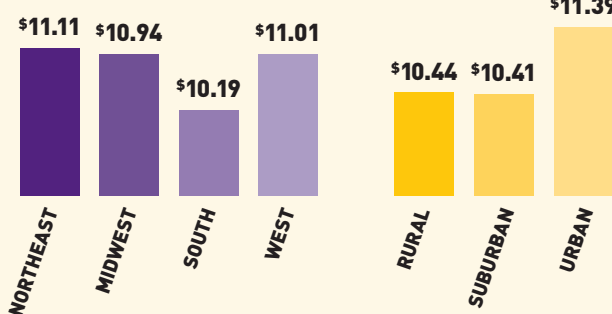
AVERAGE PRICE ACROSS THE U.S. FOR PANTS



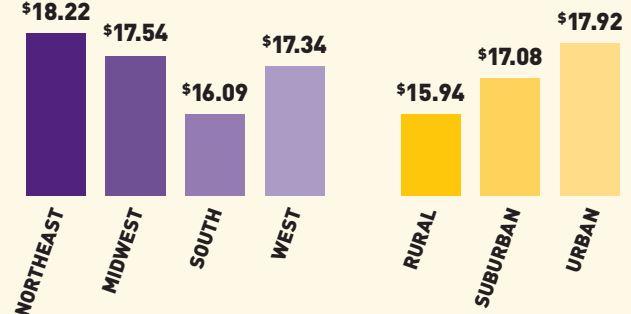
AVERAGE PRICE ACROSS THE U.S. FOR A SWEATER



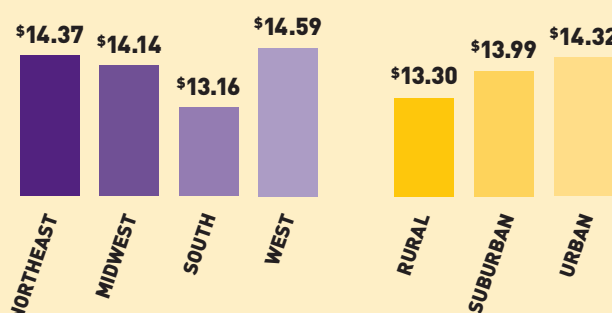
AVERAGE PRICE ACROSS THE U.S. FOR A SPORT COAT



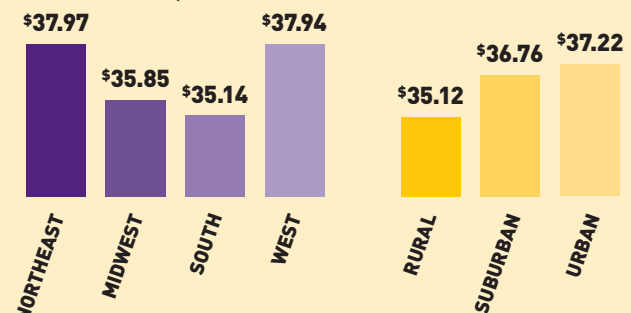
AVERAGE PRICE ACROSS THE U.S. FOR A 2-PIECE SUIT



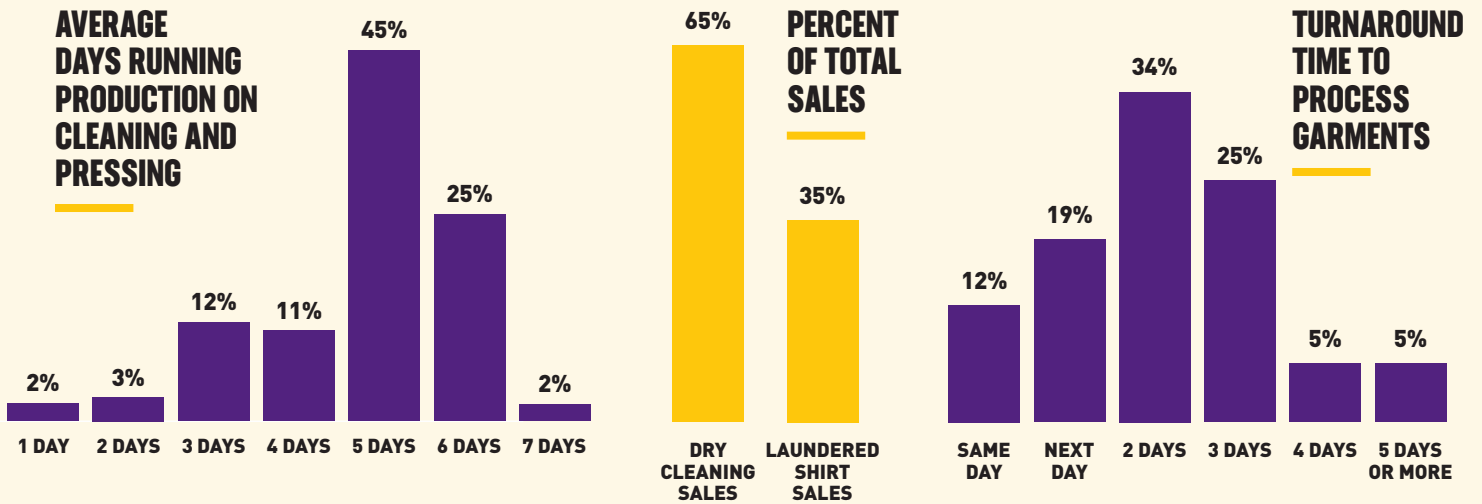
AVERAGE PRICE ACROSS THE U.S. FOR A PLAIN DRESS



AVERAGE PRICE ACROSS THE U.S. FOR A QUEEN SIZE COMFORTER

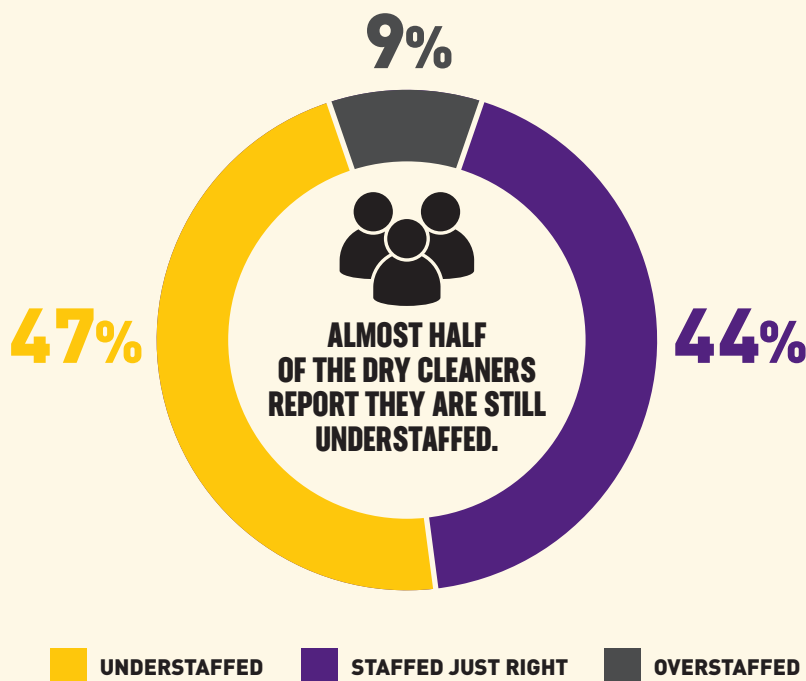


STORE OPERATIONS AND CHALLENGES.

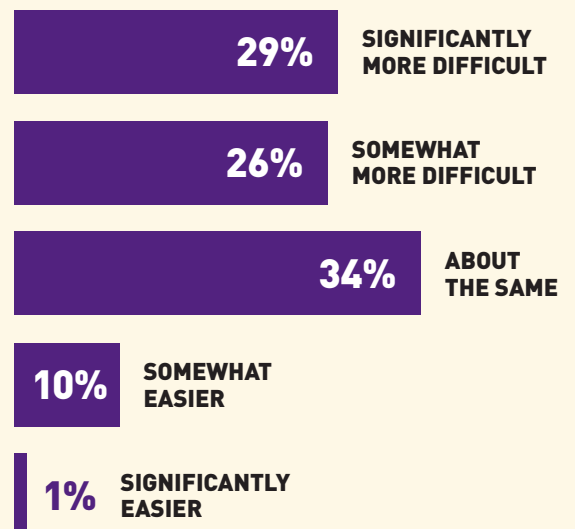


NOT SURPRISINGLY, THE THREE BIGGEST CHALLENGES FACING DRY CLEANERS ARE RECRUITMENT, REVENUE AND WORKLOAD.

Responses from dry cleaners on their top 3 challenges.



FINDING EMPLOYEES COMPARED TO LAST YEAR.

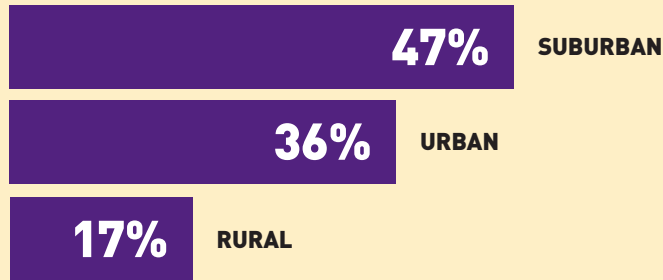


WHO IS THE TYPICAL DRY CLEANER OWNER?

YEARS IN THE INDUSTRY



WHERE DRY CLEANERS ARE LOCATED

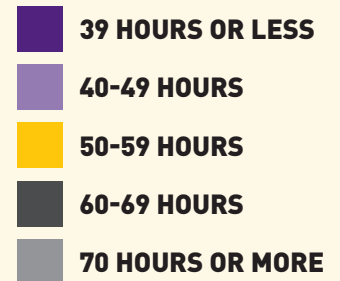
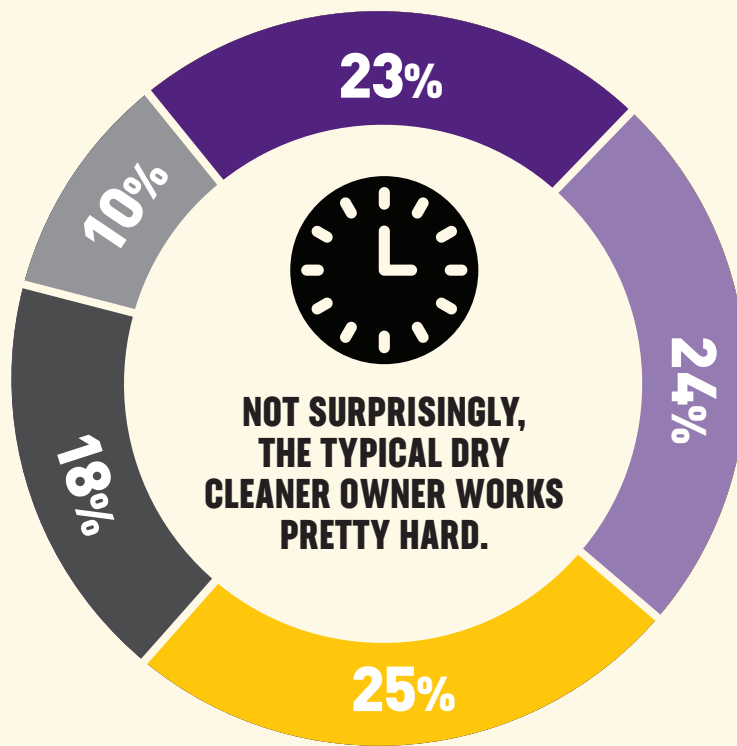


AVERAGE NUMBER OF STORES OWNED



58

AVERAGE AGE OF DRY CLEANER OWNER
(but you probably feel much older)



PERCENT OF STORES OWNED BY DRY CLEANERS

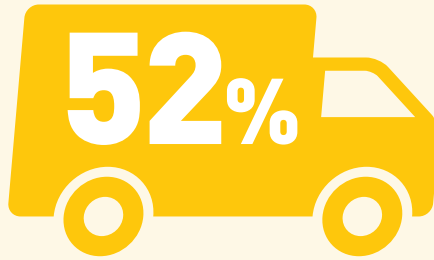


GROW, GROW, GROW YOUR BUSINESS.

PICK-UP AND DELIVERY CAN BE A REAL “DRIVER” FOR MANY DRY CLEANERS.

24%

of total sales on average are derived from pick-up and delivery for those who offer this service.



of dry cleaners offer pick-up and delivery service.

71%

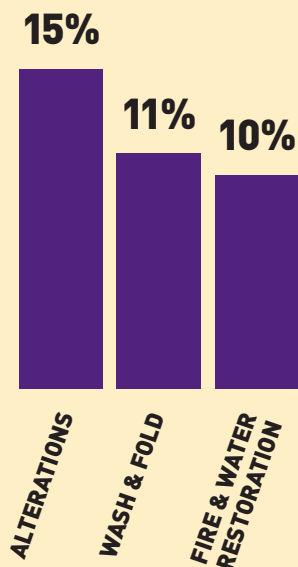
of dry cleaners indicated that they do not charge extra for deliveries.

12 MOST POPULAR ADDITIONAL SERVICES THAT DRY CLEANERS OFFER.

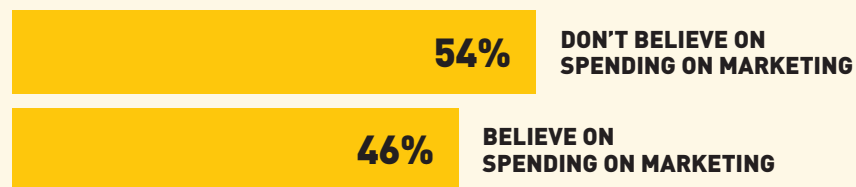
- Alteration Services
- Drapery Cleaning
- Fire & Water Restoration
- Households & Linens
- Outdoor Patio Cushion Cleaning
- Rug Cleaning
- Shoe Cleaning
- Shoe Repair
- Suede & Leather
- Tuxedo Rental
- Wash & Fold
- Wedding Gown Cleaning & Preservation

TOP 3 ADDITIONAL SERVICES BY REVENUE CONTRIBUTION.

Percent of total sales derived from these services.



SLIGHTLY MORE THAN HALF THE DRY CLEANERS IN THE U.S. BELIEVE IN NOT SPENDING MONEY ON MARKETING.



IF YOU ARE SPENDING MONEY ON ADVERTISING, THESE ARE THE MOST EFFECTIVE CHANNELS IN ORDER OF IMPORTANCE. *(excludes coupons)*

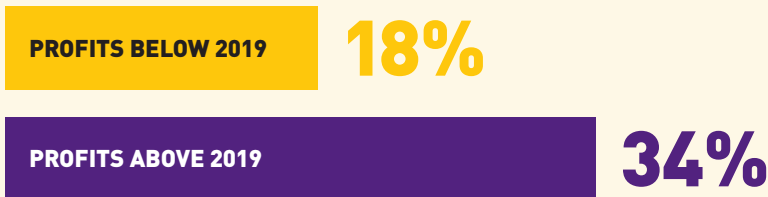
- 1 Google Ads
- 2 Email Marketing
- 3 Text Marketing
- 4 Facebook Ads
- 5 Newspaper Ads
- 6 SEO (Search Engine Optimization)
- 7 Yellow Page Ads
- 8 Radio Ads
- 9 Yelp Ads
- 10 TV Ads

DRY CLEANERS WITH PROFITS UP.



IF YOUR PROFITS ARE UP FROM 2019, THERE'S A STRONG LIKELIHOOD THAT YOU'RE DOING THESE TWO THINGS.

1 HAVE PUT THROUGH MORE PRICE INCREASES.

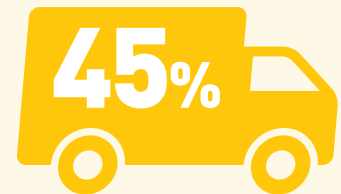


Percent of dry cleaners who raised prices from 2019 above 20%.

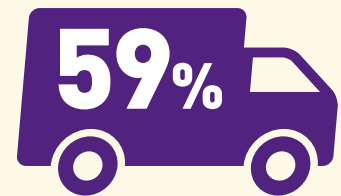


Percent of dry cleaners who plan to raise prices before the end of 2023.

2 OFFER PICK-UP AND DELIVERY.



of dry cleaners with **PROFITS BELOW 2019** offer pick-up and delivery.

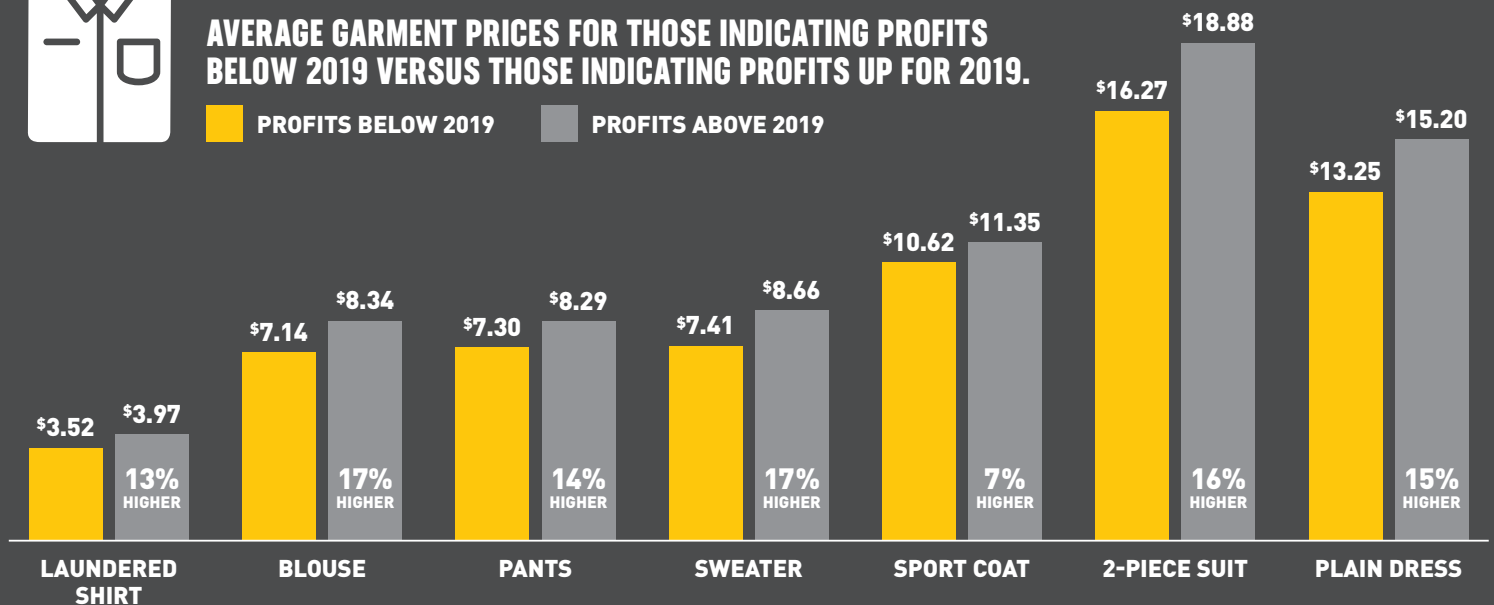


of dry cleaners with **PROFITS ABOVE 2019** offer pick-up and delivery.



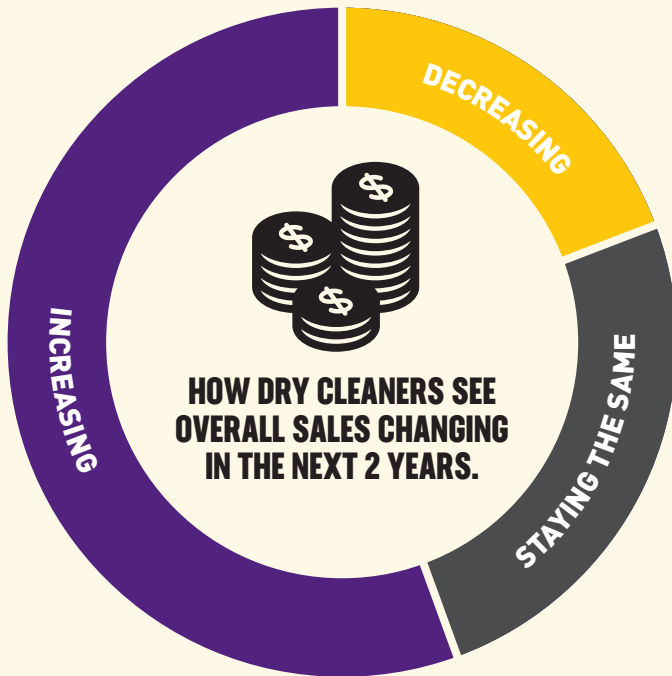
AVERAGE GARMENT PRICES FOR THOSE INDICATING PROFITS BELOW 2019 VERSUS THOSE INDICATING PROFITS UP FOR 2019.

■ PROFITS BELOW 2019 ■ PROFITS ABOVE 2019



HOW DOES THE FUTURE OF DRY CLEANING LOOK?

MOST DRY CLEANERS FEEL PRETTY OPTIMISTIC.



56%

INCREASING

16%

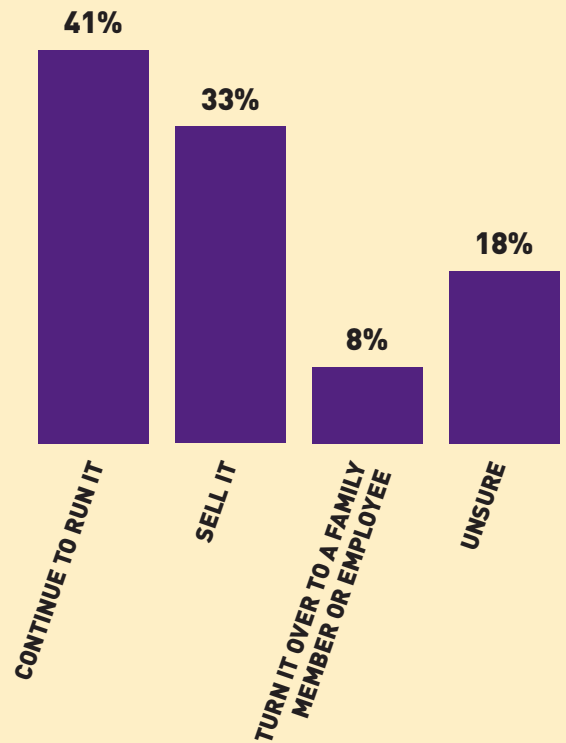
DECREASING

28%

STAYING
THE SAME



DRY CLEANING OWNERS' PLAN FOR THEIR BUSINESS IN THE NEXT 5 YEARS.



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OVER HALF OF THE DRY CLEANERS PLAN ON MAKING SOME MAJOR CAPITAL INVESTMENTS.

Top 10 purchases dry cleaners are looking to make in the next 3 years.

- 1 Dry Cleaning Pressing Equipment
- 2 Wet Cleaning Machine
- 3 Software System

- 4 Shirt Pressing Equipment
- 5 Dry Cleaning Machine
- 6 Automated Assembly

- 7 Boiler
- 8 Steam Tunnel
- 9 Dryer
- 10 Auto Bagger



**RESEARCH STUDY CONDUCTED BY
DRIVE RESEARCH COMMISSIONED BY CLEANER'S SUPPLY.**