



WAREWASH

COMPETITIVE LANDSCAPE

There are close to a dozen manufactures selling dishmachines in the US/North America. The following brands represent those with the highest market share.



Meiko	Champion	Jackson	CMA	Ecolab
Price: High	Price: Moderate to high	Price: Moderate	Price: Low	Price: "Lease" (Rental)
Product offering				
Full range of models including undercounter, door, conveyor & flight.	Full range of models including undercounter, door, conveyor & flight.	Full range of models including undercounter, door, conveyor & flight	Heavy focus on undercounters and door, some conveyor units	Primarily undercounters and door, some conveyors
Market Share				
Premium equipment manufacturer with strong presence in Europe. Weak brand recognition and market share in North America.	Premium to mid-tier manufacturer with strong brand recognition and highly aggressive sales force. Quality perception and service team strength are weaker.	Mid-tier equipment manufacturer with good brand recognition and market share.	Mid-tier equipment manufacturer with low-to moderate product perception and market share.	Chemical company with strong brand recognition and market share and excellent coverage with national team of account reps.
Technology & Innovation				
Heavy emphasis on technology & innovation with good differentiation around unique features.	Low to moderate technology and innovation – tends to follow Hobart. Balanced mix of differentiated features to price.	Low technology and innovation targeted to cost conscious customers who want functionality and some basic features and technologies.	Low technology and innovation targeted to low-price customers looking for basic performance and functionality.	Minimum spec equipment with low, no tech - primarily dispensing units for chemicals (innovation targeted at chemical dispensing). Strength is in business model: one monthly fee covers equip, chemicals, installation and service, with no unscheduled maintenance costs. Customer never owns equipment.
Competitive products				
Strongest competition is with flight type units.	Strong competition across all product lines	Strong competition across all product lines	Moderate competition with undercounter and door units.	