



**Contract Cleaning Market**  
***Research & Analysis***  
***UK 2011***

**REPORT SAMPLE**

**Contract Cleaning Market Size & Review 2006-2011; SWOT & PEST Analysis, Mix by Service Type 2006-2015; End User Mix 2006-2015; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Trend Forecasts to 2015**

**3<sup>rd</sup> Edition**

**September 2011**

# Research & Analysis Report Contents

|           |   |           |
|-----------|---|-----------|
| <b>1.</b> | <b>INTRODUCTION TO RESEARCH &amp; ANALYSIS REPORTS</b>                | <b>5</b>  |
| 1. 1      | Key Features & Benefits of this Research & Analysis Report            | 5         |
| 1. 2      | Introduction to this Research & Analysis Report                       | 6         |
| <b>2.</b> | <b>UK CONTRACT CLEANING MARKET</b>                                    | <b>7</b>  |
| 2. 1      | EXECUTIVE SUMMARY & MARKET OVERVIEW                                   | 7         |
| 2. 2      | CONTRACT CLEANING MARKET SIZE & TRENDS 2006-2015                      | 9         |
| 2.2.1     | Contract Cleaning Market Size 2006-2015 – Current Prices              | 9         |
| 2.2.2     | Contract Cleaning Market Size 2006-2015 – Constant Prices             | 10        |
| 2. 2. 3   | Average Contract Cleaner Sales Revenue 2006-2015                      | 11        |
| 2. 2. 4   | Future Prospects  | 12        |
| 2. 3      | KEY MARKET TRENDS IN THE CONTRACT CLEANING MARKET                     | 14        |
| 2. 3. 1   | Contract Cleaning Industry Profitability 2006-2015                    | 14        |
| 2.3.2     | Contract Cleaning Industry Assets 2006-2015                           | 15        |
| 2.3.3     | Contract Cleaning Industry Debt 2006-2015                             | 18        |
| 2.3.4     | Contract Cleaning Market Net Worth 2006-2015                          | 20        |
| 2. 3. 5   | Sales Per Employee in Contract Cleaning Market 2006-2015              | 22        |
| 2. 4      | KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS                           | 23        |
| 2. 4. 1   | PEST ANALYSIS – Illustration of Key Market Forces                     | 23        |
| 2.4.2     | Political & Legal Influences & Trends                                 | 24        |
| 2. 4. 3   | Economic Influences & Trends  | 26        |
|           | Gross Domestic Product 2006-2015                                      | 26        |
|           | UK Inflation 2006-2015  | 28        |
|           | Interest Rates 2006-2015  | 29        |
|           | Employment Rates  | 31        |
| 2. 4. 4   | SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats         | 32        |
| 2. 5      | CONTRACT CLEANING PRODUCT / SERVICE MIX                               | 34        |
| 2. 5. 1   | Share by Contract Cleaning Sector 2006, 2011 & 2015                   | 34        |
| 2. 5. 2   | Standard Contract Cleaning Market 2006-2015                           | 36        |
| 2. 5. 3   | Specialised Contract Cleaning Market 2006-2015                        | 37        |
| 2. 5. 4   | Window / Facade Contract Cleaning Market 2006-2015                    | 38        |
| 2. 6      | CONTRACT CLEANING END USER / CHANNEL MIX                              | 40        |
| 2. 6. 1   | Share by Key End Use Market 2006, 2011 & 2015                         | 40        |
| <b>3.</b> | <b>THE CONTRACT CLEANING INDUSTRY</b>                                 | <b>44</b> |
| 3. 1      | Contract Cleaning Industry Structure in 2011                          | 44        |
| 3.2.1     | Industry Mix by Growth/Decline Over Last 12 Months                    | 44        |
| 3.2.2     | Industry Share by Credit Rating in 2011                               | 45        |
| 3.2.3     | Industry Mix by Age of Companies in 2011                              | 46        |
| 3.2.4     | Industry Share by Number of Employees in 2011                         | 47        |
| 3.2.5     | Industry Mix by Turnover Band in 2011                                 | 48        |
| 3.2.6     | Industry Share by Location Type in 2011                               | 49        |
| 3. 2. 7   | Industry Mix by Geographical Region in 2011                           | 50        |
| <b>4.</b> | <b>RANKINGS FOR CONTRACT CLEANERS IN 2011</b>                         | <b>51</b> |
| 4. 1      | Contract Cleaning Companies Listing                                   | 51        |
| 4.2       | Contract Cleaners Ranking By Turnover                                 | 53        |
| 4.2       | Individual Turnover Estimates by Company                              | 55        |
| 4.3       | Contract Cleaners Ranking by Profitability                            | 59        |
| 4.4       | Contract Cleaners Ranking by Assets                                   | 61        |
| 4.5       | Contract Cleaners Ranking by Debt                                     | 63        |
| 4.6       | Contract Cleaners Ranking by Net Worth                                | 65        |
| <b>5.</b> | <b>CONTRACT CLEANERS PROFILES &amp; ‘AT A GLANCE’</b>                 | <b>67</b> |
|           | 1 Page Contractor Profiles, 4 Years Financials & ‘At a Glance Charts’ | 67-212    |

# Market Report Tables & Charts

|   |        |
|---|--------|
| Figure 1: Contract Cleaning Market – UK 2006 – 2015 By Value £m MSP                   | 9      |
| Figure 2: Contract Cleaning Market – UK 2006 – 2015 Constant Prices £M                | 10     |
| Figure 3: Average Sales in the Contract Cleaning Market – UK 2006 – 2015 £M           | 11     |
| Figure 4: Contract Cleaning Market Profitability – UK 2006 – 2015 £M                  | 14     |
| Figure 5: Contract Cleaning Market Average Profitability – UK 2006 – 2015 £M          | 15     |
| Figure 6: Total Asset Performance – UK 2006 – 2015 £M                                 | 16     |
| Figure 7: Average Asset Performance – UK 2006 – 2015 £M                               | 17     |
| Figure 8: Contract Cleaning Market Debt – UK 2006 – 2015 £M                           | 18     |
| Figure 9: Contract Cleaning Market Average Debt – UK 2006 – 2015 £M                   | 19     |
| Figure 10: Contract Cleaning Market Net Worth – UK 2006 – 2015 £M                     | 20     |
| Figure 11: Contract Cleaners Average Net Worth – UK 2006 – 2015 £M                    | 21     |
| Figure 12: Sales Per Employee – UK 2006 – 2015 £M                                     | 22     |
| Figure 13: PEST Analysis for UK Contract Cleaning Market in 2011                      | 23     |
| Figure 14: UK Economic Annual Performance– GDP 2006-2015                              | 26     |
| Figure 15: UK Economic Annual Performance– Inflation (CPI) 2006-2015                  | 28     |
| Figure 16: UK Economic Annual Performance– Interest Rates (Bank of England) 2006-2015 | 29     |
| Figure 17: UK Unemployment Numbers 2006-2015  | 31     |
| Figure 18: Key Strengths & Weaknesses in the Contract Cleaning Market 2011-2015       | 32     |
| Figure 19: Key Opportunites & Threats in the Contract Cleaning Market 2011-2015       | 33     |
| Figure 20: Share by Key Product Sector in Contract Cleaning Market 2011               | 34     |
| Figure 21: Historical Share by Key Sector in Contract Cleaning Market 2006            | 34     |
| Figure 22: Forecast Share by Key Sector in Contract Cleaning Market 2015              | 35     |
| Figure 23: UK Standard Contract Cleaning Market by Value 2006-2015 £M                 | 36     |
| Figure 24: Specialised Contract Cleaning Market by Value 2006-2015 £M                 | 37     |
| Figure 25: Window / Facade Contract Cleaning Market by Value 2006-2015 £M             | 38     |
| Figure 26: Share by Key End Use Sector in Contract Cleaning Market 2011               | 40     |
| Figure 27: Historical Share by Key End Use Sector in Contract Cleaning Market 2006    | 41     |
| Figure 28: Share by Key End Use Sector 2006, 2011 & Forecasts to 2015                 | 43     |
| Figure 29: Market Share by Contract Cleaning Company Sales Growth / Decline 2011      | 44     |
| Figure 30: Market Share by Credit Rating in the Contract Cleaning Industry 2011       | 45     |
| Figure 31: Market Share by Company Age in the Contract Cleaning Market 2011           | 46     |
| Figure 32: Mix by Number of Employees in the Contract Cleaning Market 2011            | 47     |
| Figure 33: Share by Turnover Band in the Contract Cleaning Market 2011                | 48     |
| Figure 34: Mix by Location Type in the Contract Cleaning Market 2011                  | 49     |
| Figure 35: Mix by Location Type in the Contract Cleaning Market 2011                  | 50     |
| Figure 36: Contract Cleaning Company Listing  | 51     |
| Figure 37: Contract Cleaning Companies Ranked By Turnover 2010                        | 53     |
| Figure 38: Contract Cleaning Companies Sales Estimates 2010                           | 55     |
| Figure 39: Contract Cleaning Companies Ranked By Profit 2010                          | 59     |
| Figure 40: Contract Cleaning Companies Ranked By Assets 2010                          | 61     |
| Figure 41: Contract Cleaning Companies Ranked By Debt 2010                            | 63     |
| Figure 42: Contract Cleaning Companies Ranked By Net Worth 2010                       | 65     |
| Figures 43-188: Contract Cleaning Companies 4 Years Financials "At A Glance"          | 67-212 |

This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

### **Terms & Conditions of Use**

The information contained within this report remains the copyright of MTW Research. Subject to these Terms and Conditions (this "Agreement"), MTW Research ("we", "our", "us") makes available this publication and data or information contained therein (the "Report"). Your use of this report constitutes your acknowledgment and assent to be bound by this Agreement.

### **Permitted Use, Limitations on Use**

You may access purchased Reports only as required to view the Reports for your individual use, and may print/copy a purchased Report once for your use. You may copy extracts from purchased Reports onto your own documents, provided that all citations are attributed to "MTW Research", and are for internal use only. You may not republish, resell or redistribute any Report, or do anything else with any Report, which is not specifically permitted in this Agreement. You may not reproduce, store in a retrieval system or transmit by any means, electronic or mechanical, any report without the prior permission of MTW Research.

### **Limitation of Liability**

You are entirely liable for activities conducted by you or anyone else in connection with your use of the Report. We take no responsibility for any incorrect information supplied to us during the research process. Market information is based on telephone interviews and secondary sources whose accuracy we cannot guarantee. You acknowledge when ordering that MTW Research Reports are for your internal use and not for general publication or disclosure to third parties, unless otherwise agreed. Neither MTW Research nor any of its affiliates, owners, employees or other representatives will be liable for damages arising out of or in connection with the use of the Report or the information, content, materials or products included in the Report. This is a comprehensive limitation of liability that applies to all damages of any kind, including (without limitation) compensatory, direct, indirect or consequential damages, loss of data, income or profit, loss of or damage to property and claims of third parties.

### **Applicable Law**

This Agreement will be governed by and construed in accordance with the laws of England and Wales without giving effect to the principles of conflict of laws thereof, and to the extent permitted by applicable law, you consent to the jurisdiction of courts situated in England and Wales in any action arising under this agreement.

### **Intellectual Property Rights**

You acknowledge that legal and beneficial interest in Intellectual Property Rights in connection with the Report belong to us. This includes all Intellectual Property Rights in any Material. You have no rights in or to the Report and you may not use any Material other than as permitted under this Agreement. We grant you a non-exclusive, non-transferable licence to use the Intellectual Property Rights referred to above solely for the use of Material as permitted under this agreement.

### **Companies Included**

Whilst MTW endeavour to ensure that the majority of the major companies active in the market with which this report is concerned are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily indicate, nor should be interpreted as, a company's relevance or otherwise in a particular market. Whilst we endeavour to attain high levels of accuracy, it should be borne in mind that the rankings and other information provided within this report contain an element of estimation, should be regarded as such and treated with a degree of caution.

### **Estimates Provided**

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

# 1. Introduction to *Research & Analysis* Reports

## 1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, end user mix, key trends and influences and forecasts of market size for the next 4 years. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent, strategic decision making, based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product / Service Mix – Current & Future**

This report identifies the key product or service sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **End User / Channel Mix – Current & Future**

The report identifies the key end use sectors or channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key end use sectors also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

## **1.2 Introduction to this Research & Analysis Report**

In order to provide a comprehensive review of the market, this report includes:-

### **THE MARKET, PRODUCTS & END USERS**

- **Market Size & Key Market Trends 2006-2015** – Value of the market since 2006 is provided with current market size estimates provided based on quantitative sales figures from the industry. Profitability, assets, liabilities and net worth are also illustrated in easy to read, yet stylish charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2015. Key market trends are also identified and discussed providing the report with both ‘quantitative’ and ‘qualitative’ characteristics.
- **PEST Review & Key Market Influences** – A review of the key issues and influences which are impacting market demand at present and in the future are also provided. These issues range from economic, political, environmental, social and technological and are identified and discussed where appropriate, providing the reader with a greater depth of market intelligence. A strategic PEST review for this market is also illustrated in chart format for faster reference.
- **Product/Service Mix & Trends** – This report identifies the key sectors which comprise the overall market and provide a current & historical share by value. This data is supported by qualitative comment where appropriate in order to offer more substantive market knowledge. Forecasts to 2015 are also provided to offer more insightful market intelligence.
- **SWOT Analysis** – A strategic SWOT analysis for the market is also provided based on input from primary and secondary sources in the industry. By identifying key strengths, weaknesses, opportunities and threats, this report provides a more solid foundation for basing strategic and operational marketing decisions.
- **End User / Channel Mix & Trends** – By providing historical, current and forecast shares by end user or channel for this market, the report provides an invaluable illustration of the key sectors that are currently driving demand and likely future prospects. Qualitative comment on key trends within these sectors based on input from the industry provides a more in-depth review of the market as well as illustrating the most likely future scenarios.

### **THE SUPPLIERS & INDUSTRY STRUCTURE**

- **Industry Structure** – The report includes a detailed and quantitative review of the industry in terms of number of companies, share by turnover, mix by employees, geographical mix, share by age of companies, mix by recent sales performance, sales per employee, share by credit rating etc
- **Industry Trends 2006 –2015** – Industry totals and averages since 2006 are also provided for turnover, profitability, assets, net worth and liabilities. These indicators provide vital insight into the current health of the industry and are forecasted to 2015.
- **Supplier Review** – This report provides in-depth intelligence of relevant and leading players in this market. Unique in that we estimate a turnover for every company in the report, the report also ranks each company by turnover, profitability, number of employees and other key financial indicators. Each company also has a 1 page profile identifying contact details, overview of activities, key financials for the last 4 years and an ‘*at a glance*’ financial health chart. The report provides turnover estimates for every company, regardless of size, enabling the reader to easily identify individual market shares.

## 2. UK CONTRACT CLEANING MARKET

### 2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK contract cleaning market is estimated to be worth some £X billion in 2011, reflecting an XXXXX in market value of around X% since 2009. At present, market value is estimated to be at levels XXXXX XXXXX in XXXXX, reflecting the XXXXXXXX XXXXXXXX XXXX. However, given the likelihood of XXXX in terms of overall XXXX output in 2012, coupled with XXXXX, our forecasts are XXXX XXXX inflationary XXXXXXX for the market during 2012 in current price terms.

It is estimated that average sales in the contract cleaning industry are around £XX million in 2011, reflecting an overall XXXX of around XX% since 2006. Despite the XXXX XXXXXXX, XXXXXXX is forecast in the XXXXXXX XXXXXXX with an annual XXXXX of around XXXX% expected in 2012, and XXXXX XXXXXXX of XX% to 2015.

XXXXXXX and XXXXXXX initiatives are currently a key characteristic of the contract cleaning market. Longer-term prospects for the industry remain XXXXXXX as businesses continue to XXXXXXXX such as XXXXXXXX in order to focus on XXXXXXX competencies. Industry profitability has XXXXXXX to a current estimated value of just over £XXXX million. These XXXX are in part due to contract cleaning companies implementing further XXXXXXX XXXXXXX schemes.

Following the rapid XXXXXXX of XXXXXXX XXXXXXX in recent years, capital expenditure has XXXXXXX and XXXXXXXX has been focused on XXXXX XXXXXXX equipment, XXXXX XXXX XXXXX XXXX additional stimulus for cleaning product & equipment suppliers. A XXXXXXX has been seen over recent months which should XXXXXXX XXXX XXXXXXX XXXX the contract cleaning industry and related suppliers in the XXXXX XXXXXXX, with industry assets forecast to XXX by X% per annum from 2012 –2015.

Opportunities for growth evident in the market at present include a

## **2.2 CONTRACT CLEANING MARKET SIZE & TRENDS 2006-2015**

### **2.2.1 Contract Cleaning Market Size 2006-2015 – Current Prices**

The UK contract cleaning market is estimated to be worth around £4.7 billion in 2011 as illustrated in the following chart:-

**Figure 1: Contract Cleaning Market – UK 2006 – 2015 By Value £m MSP**

Chart Censored from Sample

**Source: MTW Research / Trade Estimates**

The above chart illustrates that the contract cleaning market is estimated to have



### 2.2.2 Contract Cleaning Market Size 2006-2015 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2006, with forecasts to 2015:-

**Figure 2: Contract Cleaning Market – UK 2006 – 2015 Constant Prices £M**

Censored from Sample

**Source: MTW Research / Trade Estimates**

Based on constant 2006 prices the above chart illustrates a

#### 2. 4. 4 SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the contract cleaning market, the following table identifies some of the key strengths & weaknesses evident in the UK contract cleaning market at present:-

**Figure 18: Key Strengths & Weaknesses in the Contract Cleaning Market 2011-2015**

| <b>STRENGTHS</b>  | <b>WEAKNESSES</b>  |
|---|--|
| <ul style="list-style-type: none"><li>• Majority of companies</li></ul> | <ul style="list-style-type: none"><li>• Sustained level of</li></ul> |

**Source: MTW Research Strategic Review 2011**

The following table identifies some of the key opportunities and threats evident in the market at present:-

**Figure 19: Key Opportunites & Threats in the Contract Cleaning Market 2011-2015**

| OPPORTUNITIES  | THREATS   |
|--|---|
| <ul style="list-style-type: none"><li>• High level</li></ul> | <ul style="list-style-type: none"><li>• High level of</li></ul> |

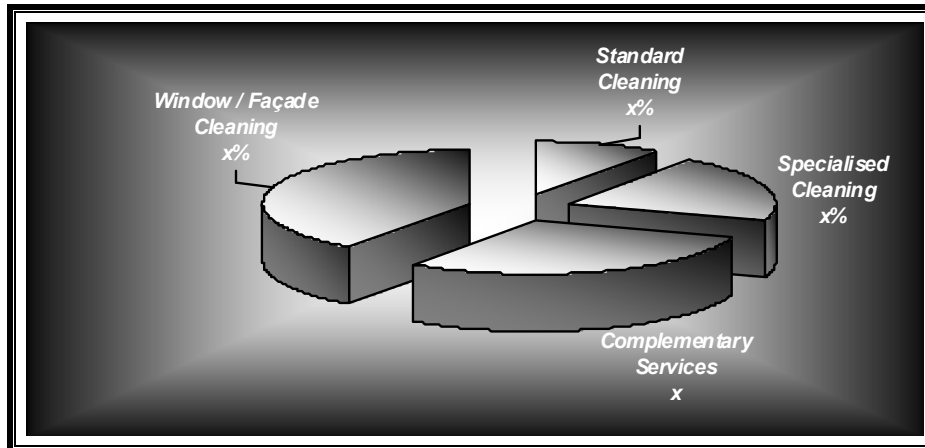
**Source: MTW Research Strategic Review 2011**

## 2. 5 CONTRACT CLEANING PRODUCT / SERVICE MIX

### 2. 5. 1 Share by Contract Cleaning Sector 2006, 2011 & 2015

The share accounted for by each of the key sectors within the UK contract cleaning market in 2011 is illustrated in the following chart:-

**Figure 20: Share by Key Product Sector in Contract Cleaning Market 2011**



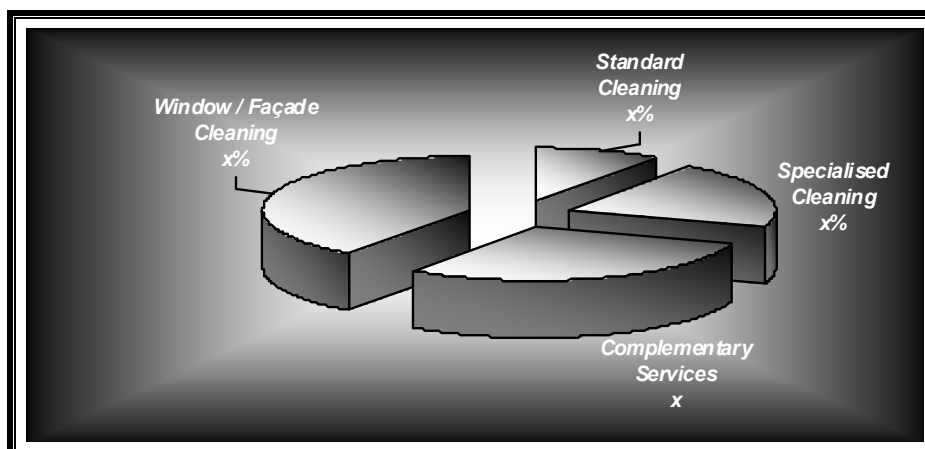
**Source: MTW Research / Trade Sources(sample chart)**

As the above chart illustrates, standard cleaning services dominate the market in 2011 with this sector worth around £x billion, reflecting a share of x% of the total market.

The second largest sector at present is accounted for by

The following chart illustrates the historical mix by value for each of the key sectors in 2006:-

**Figure 21: Historical Share by Key Sector in Contract Cleaning Market 2006**

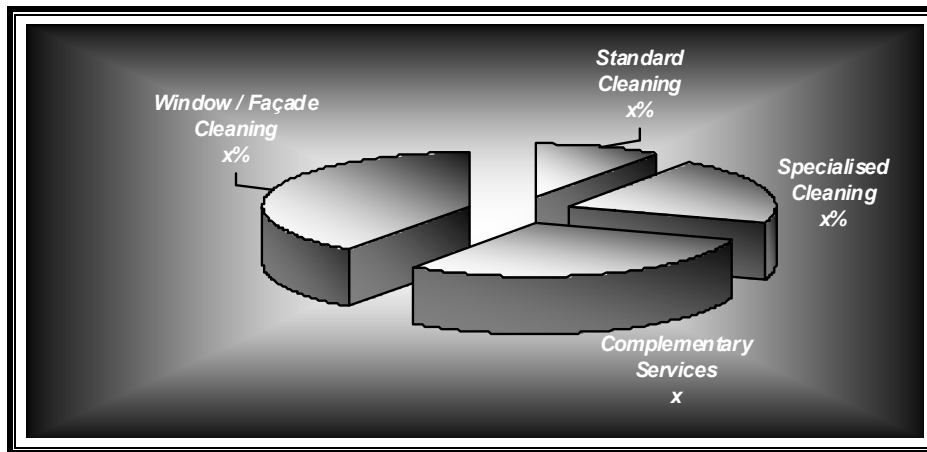


**Source: MTW Research / Trade Sources(sample chart)**

The above chart illustrates how the market has changed historically in terms of service provision, with

In terms of future prospects, the following chart illustrates our forecasts of the likely share for each sector in 2015:-

**Figure 22: Forecast Share by Key Sector in Contract Cleaning Market 2015**



**Source: MTW Research / Trade Sources (Sample Chart)**

By 2015, forecasts suggest that

## 2. 5. 2Standard Contract Cleaning Market 2006-2015

The following chart illustrates the performance of the 'standard cleaning' sector of the contract cleaning market by value since 2006 and forecasts to 2015:-

**Figure 23: UK Standard Contract Cleaning Market by Value 2006-2015 £M**

Censored

**Source: MTW Research / Trade Estimates**

It can be seen from the above chart that standard cleaning is currently worth some

### **2. 5. 3Specialised Contract Cleaning Market 2006-2015**

The following chart illustrates the performance of the 'specialised cleaning' sector of the contract cleaning market by value since 2006 and forecasts to 2015:-

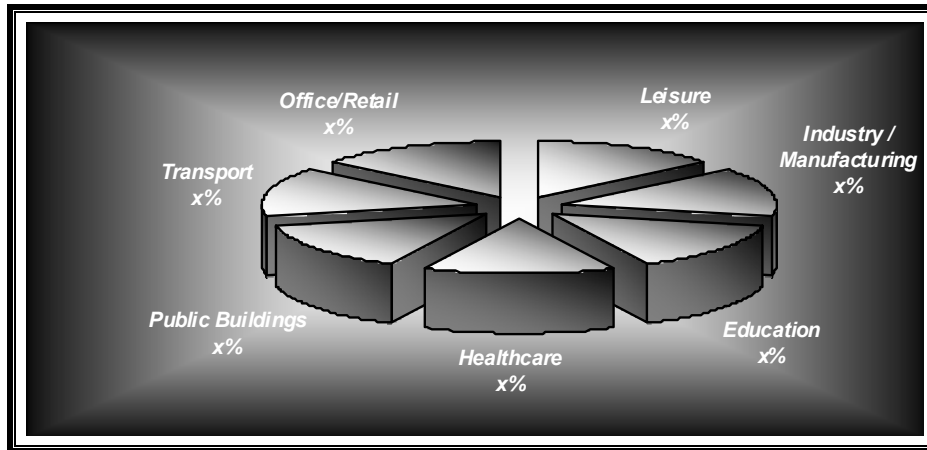
## 2. 6 CONTRACT CLEANING END USER / CHANNEL MIX

The following section identifies the key end use target markets for the UK contract cleaning industry and provides an illustration of historical market share in 2006, current share in 2011 and provides a forecast share for 2015.

### 2. 6. 1 Share by Key End Use Market 2006, 2011 & 2015

The contract cleaning market comprises of a wide range of end use markets. The following table illustrates our estimates of the current share accounted for by these sectors in 2011 by value:-

**Figure 26: Share by Key End Use Sector in Contract Cleaning Market 2011**



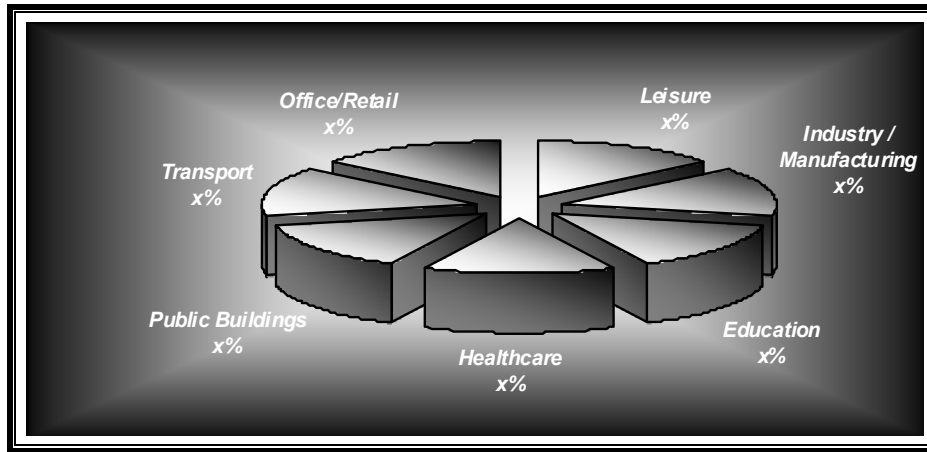
**Source: MTW Research / Trade Sources(sample chart)**

Due to



In order to provide a historical comparison, the following chart illustrates the key sectors' estimated share of the contract cleaning market in 2006:-

**Figure 27: Historical Share by Key End Use Sector in Contract Cleaning Market 2006**



**Source: MTW Research / Trade Sources**

According to trade sources, the largest end use

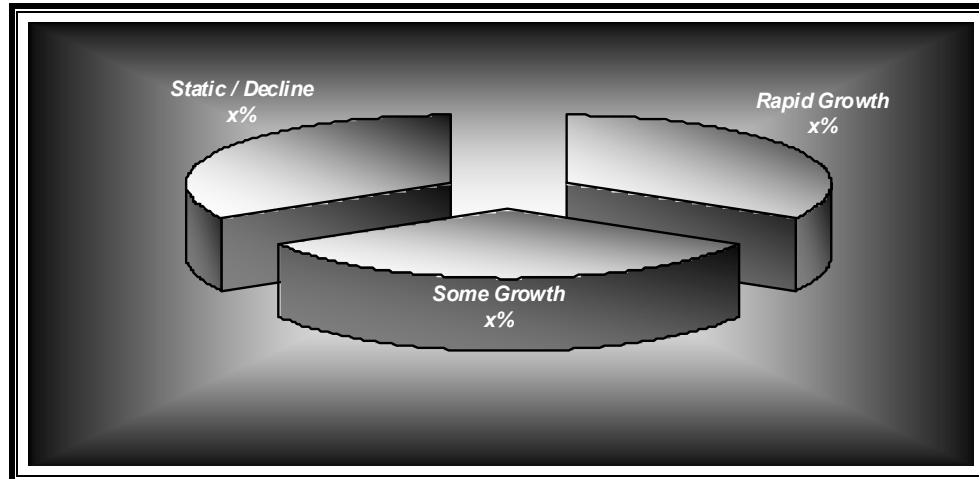
### 3. THE CONTRACT CLEANING INDUSTRY

#### 3.1 Contract Cleaning Industry Structure in 2011

##### 3.2.1 Industry Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

**Figure 29: Market Share by Contract Cleaning Company Sales Growth / Decline 2011**



**Source: MTW Research / Company Accounts(sample chart)**

For the preceding 12 months to September 2011, our estimates suggest that more than x% of the market experienced growth which could be described as 'rapid', with sales rising by more than 10% per year. Further, around x% of the contract cleaning market is estimated to have experienced some sales growth over the last 12 months.

However, whilst the above chart identifies more than

## 4. RANKINGS FOR CONTRACT CLEANERS IN 2011

### 4.1 Contract Cleaning Companies Listing

The list below illustrates the key players active in the market at present:-

**Figure 36: Contract Cleaning Company Listing**

|                                      |  |                                      |
|--------------------------------------|--|--------------------------------------|
| 1st Omega Contract Cleaning Ltd      | Edwards Commercial Cleaning Services Ltd | OCS Group UK Ltd                     |
| A J Procter Cleaning Contractors     | Emprise Services Plc                     | Optim Contract Services              |
| Able Cleaning Services Ltd           | Enviroclean Services Ltd                 | Orion Cleaning Co Ltd                |
| Ableclean Ltd                        | Euroclean Contractors Limited            | Pacemaker Cleaning Services Ltd      |
| Acre Industrial & Cleaning Services  | Europa Support Services                  | Paneless Services Ltd                |
| Aim Hygiene Services                 | Executive Cleaning Ltd                   | Pinnacle Cleaning                    |
| Alliance Cleaning Services UK Ltd    | Falcon Cleaning Services Ltd             | PKM Cleaning Ltd                     |
| Alternative Cleaning Ltd             | Farnham Office Cleaning Co Ltd           | Poplars F. M Ltd                     |
| Angel Cleaning Services Ltd          | Finclean S K J Ltd                       | Premier Cleaners Ltd                 |
| Apex Cleaning Services (Wales)       | Floorbrite Cleaning Contractors Ltd      | Premier Contract Cleaning Ltd        |
| Archgate Cleaning & Support Services | Fluid Options UK Limited                 | Premier Contract Services (Bristol)  |
| Ashbon Services                      | G S F Sandylight Ltd                     | Progressive Cleaning Ltd             |
| Ashford Cleaning Contractors Ltd     | GBM Support Services Group Limited       | Prokleen Uk Ltd                      |
| Atlas Cleaning                       | Glen Cleaning Co Ltd                     | Purley Contract Cleaning Co Ltd      |
| Ayleton Cleaning Ltd                 | Glencross Cleaning Ltd                   | Regent Office Care Ltd               |
| Bespoke Cleaning Contractors Ltd     | Glenn Management Ltd                     | Rentokil Initial Plc                 |
| Birkin Cleaning Services Ltd         | Global Multi Service Uk Ltd              | Response Services Uk Ltd             |
| Blitz Cleaning & Maintenance Ltd     | Goldenclean Ltd                          | Reynard Cleaning Ltd                 |
| Bluebay Cleaning Services            | Goldservice Contract Cleaning Ltd        | RGS Cleaning Ltd                     |
| Bush Brush Cleaners Ltd              | Graduate Services Ltd                    | Riverside Contract Cleaning Services |
| Busy Bee Cleaning                    | Hall Cleaning Services Ltd               | SCB Services                         |
| Capital Maintenance Services Ltd     | Hayward Services Ltd                     | Scot Kleen Ltd                       |
| Carlisle Cleaning Services           | HBS Europe Services Ltd                  | Scotia Clean Teck Ltd                |
| Carlton Cleaning Contractors Ltd     | Hygienic Cleaning Company (UK) Ltd       | SCS Cleaning Services Ltd            |
| Caroline Mondo Cleaning Services     | Ideal Cleaning Services                  | Servicemaster Ltd                    |
| Celtic Cleaning                      | Insitu Cleaning Co                       | Smart Cleanings UK Ltd               |
| Central Industrial Services Ltd      | Integrated Cleaning Management           | Sofisti-Clean Limited                |
| Chrysalis Cleaning                   | Inter County Service Group Ltd           | Sparkle Cleaning Co, (London) Ltd    |
| City Cleaning Contracts Ltd          | Interclean Commercial Ltd                | Spick & Span Professional Cleaners   |
| Civic Maintenance Services Ltd       | Inverclean Services Ltd                  | Supreme Cleaning Services Ltd        |
| Classic Cleaning Services Ltd        | Jani-King (GB)                           | Sussex Cleaning & Care Ltd           |
| Clayton Cleaning Consultants         | Jardak Services Ltd                      | Swallow Cleaning Contractors         |
| Clean Image                          | K G B Cleaning & Support Services        | Swift Cleaner Services Ltd           |
| Clean Slate (UK) Ltd                 | Kenkleen Ltd                             | TC Cleaning Contractors              |
| Cleanbright Services Ltd             | Kite Contract Cleaning Ltd               | Templewood Cleaning Service          |
| Cleaner Care Ltd                     | Lakethorne Ltd                           | Tewkesbury Cleaning Services Ltd     |
| Cleanit Contract Services Ltd        | Lancaster Office Cleaning                | Thames Cleaning & Support Services   |
| Cleanrite Ltd                        | Landmark Facilities Management Ltd       | Thames Valley Cleaning Services      |
| Consultant Cleaners                  | LCC Support Services Ltd                 | The Carroll Cleaning Co Ltd          |
| Corporate Hygienics Ltd              | M & D Cleaning Services Ltd              | Three C's Cleaning Ltd               |
| Courtesy Cleaning Services Ltd       | Martyn Madden                            | Tower Group Services Ltd             |
| Cranes Cleaning Co. Ltd              | Mavis Russell Cleaning Ltd               | Trowbridge Office Cleaning Services  |
| Crusader Cleaners Ltd                | Meridian Contract Services Ltd           | Tudor Contract Cleaners Ltd          |
| D P Cleaning Services                | Millard's Cleaning Services Ltd          | Universal Cleaning Ltd               |
| Delta Cleaning Services (Scotland)   | Millennium Cleaning Ltd                  | Vanguard Cleaning Management         |
| LtdDeniva Cleaning Services Ltd      | Mitie Cleaning & Environmental Svcs      | Solutions Ltd                        |
| Diamond Commercial Cleaning Ltd      | Monthind Ltd                             | We Clean Ltd                         |
| Dougland Support Services Ltd        | North Downs Cleaning & Maintenance       | Wycombe Office Contract Cleaners     |
| Dusters Wales Ltd                    | North East Cleaning Systems Ltd          | Zonecloth Ltd                        |

**Source: MTW Research**

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

## **4.2 Contract Cleaners Ranking By Turnover**

The table illustrates our estimates of the turnover rank for each company:-

**Figure 37: Contract Cleaning Companies Ranked By Turnover 2010**

1 R

**Source: MTW Research / Trade Sources**

## 4.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2010:-

**Figure 38: Contract Cleaning Companies Sales Estimates 2010**

| Trading Name   | 2010<br>Turnover<br>£M | Trading Name | 2010<br>Turnover<br>£M |
|----------------|------------------------|--------------|------------------------|
| Sample Company | xxx                    |              | 1.8                    |
|                | xxx. 0                 |              | 1.7                    |
|                | xxx. 7                 |              | 1.7                    |
|                | xxx. 0                 |              | 1.6                    |
|                | xxx. 0                 |              | 1.5                    |
|                | xx. 5                  |              | 1.5                    |
|                | xx. 5                  |              | 1.3                    |
|                | xx. 5                  |              | 1.3                    |
|                | xx. 5                  |              | 1.2                    |
|                | xx. 2                  |              | 1.1                    |
|                | xx. 5                  |              | 1.1                    |
|                | 17. 0                  |              | 1.1                    |
|                | 13. 5                  |              | 1.1                    |
|                | 13. 3                  |              | 1.1                    |
|                | 13. 2                  |              | 1.1                    |
|                | 11. 6                  |              | 1.0                    |
|                | 11. 5                  |              | 1.0                    |
|                | 11. 1                  |              | 1.0                    |
|                | 8. 5                   |              | 1.0                    |
|                | 8. 3                   |              | 0.9                    |
|                | 8. 2                   |              | 0.9                    |
|                | 7. 3                   |              | 0.9                    |
|                | 7. 2                   |              | 0.8                    |
|                | 6. 2                   |              | 0.8                    |
|                | 6. 0                   |              | 0.8                    |
|                | 5. 5                   |              | 0.8                    |
|                | 4. 7                   |              | 0.7                    |
|                | 4. 3                   |              | 0.7                    |
|                | 4. 1                   |              | 0.7                    |
|                | 3. 8                   |              | 0.7                    |
|                | 3. 6                   |              | 0.7                    |
|                | 3. 4                   |              | 0.6                    |
|                | 2. 8                   |              | 0.6                    |
|                | 2. 5                   |              | 0.6                    |
|                | 2. 4                   |              | 0.6                    |
|                | 2. 1                   |              | 0.6                    |
|                | 2. 1                   |              | 0.6                    |
|                | 2. 0                   |              | 0.6                    |
|                | 2. 0                   |              | 0.6                    |
|                | 2. 0                   |              | 0.5                    |
|                |                        |              | 0.5                    |
|                |                        |              | 0.5                    |

### **4.3 Contract Cleaners Ranking by Profitability**

The following table illustrates our estimates of the rank by profit for each of the contract cleaners in 2010:-

**Figure 39: Contract Cleaning Companies Ranked By Profit 2010**

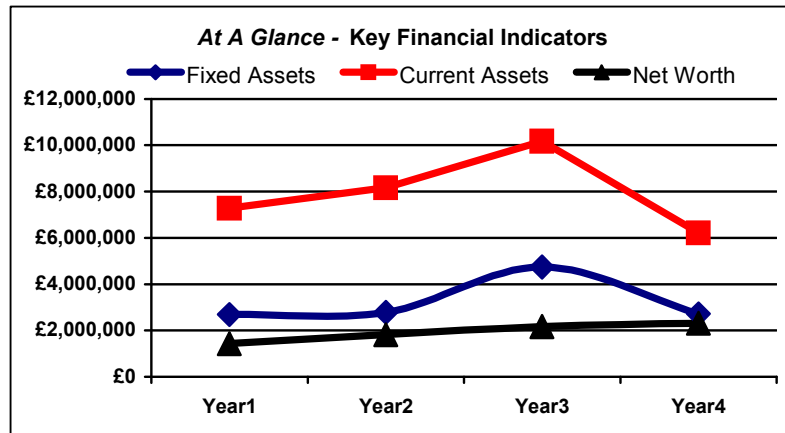
## 5. CONTRACT CLEANERS PROFILES & 'AT A GLANCE'

The following chapter illustrates the key financial indicators for the selected companies active in the UK contract cleaning industry, along with an 'at a glance' chart, illustrating the recent performance of each company. Turnover and profit estimates are also provided for each company alongside a brief description of activities, estimate of number of employees and contact details.

### Sample Services - Company Overview & 'At a Glance'

30 Sample Street  
Sample Address  
Postcode  
Tel: Sample

Sample Services is a public limited with share capital company, incorporated on May 24, 1989. The company's main activities are recorded by Companies House as "The provision of contract cleaning services in the UK". In 2011, the company has an estimated 2500 employees.



To year end December 2010, Sample Services is estimated to have achieved a turnover of around £36.5 million. Pre-tax profit for the same period is estimated at around £1.20 million.

The following table briefly provides a top line overview on Sample Services:-

|   |   |
|---|---|
| <b>Company Name</b>                     | Sample Services                                       |
| <b>Brief Description of Activities</b>  | The provision of contract cleaning services in the UK |
| <b>Parent Company</b>                   | Sample SERVICES HOLDINGS LIMITED                      |
| <b>Ultimate Holding Company</b>         | Sample GROUP PLC                                      |
| <b>Estimated Number of Employees</b>    | 3000  |
| <b>Senior Decision Maker / Director</b> | Sample Sample   |

The following table illustrates the company's key performance indicators for the last 4 years:-

**Sample Services - 4 Year KPIs to Year End 31-Dec-10**

| Key Indicator £              | Year End 31-Mar-08 (Year1) | Year End 31-Dec-08 (Year2) | Year End 31-Dec-09 (Year3) | Year End 31-Dec-10 (Year4) |
|------------------------------|----------------------------|----------------------------|----------------------------|----------------------------|
| <b>Fixed Assets</b>          | £2,690,000                 | £2,774,000                 | £4,731,000                 | £2,712,000                 |
| <b>Current Assets</b>        | £7,275,000                 | £8,161,000                 | £10,171,000                | £6,209,000                 |
| <b>Current Liabilities</b>   | £6,614,000                 | £7,035,000                 | £10,725,000                | £4,653,000                 |
| <b>Long Term Liabilities</b> | £57,000                    | £217,000                   | £153,000                   | £100,000                   |
| <b>Net Worth</b>             | £1,432,000                 | £1,821,000                 | £2,162,000                 | £2,306,000                 |
| <b>Working Capital</b>       | £661,000                   | £1,126,000                 | £-554,000                  | £1,556,000                 |