



Commercial Cleaning Equipment Market *Research & Analysis* UK 2018

**Commercial Cleaning Equipment Market Size & Industry Review 2012-2022;
SWOT & PEST Analysis, Product Mix & Key Trends 2012-2022; Distributors &
Manufacturers Profiles & Key Financials; Market Forecasts to 2022**

1st Edition

April 2018

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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.

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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, SWOT, key trends and influences, supply and distribution channel trends. 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 be 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, PEST, SWOT & Trends – 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 Mix – Past, Current & Future

This report identifies the key product 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 this report including qualitative and quantitative data we are able to offer an effective insight into the market, as well as forecasting future market shares.

Distribution Channel Sales – Past, Current & Future

The report identifies the key distribution channels that drive demand for this market and provides a current, historical & future market share estimate. 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 channels also provided, the reader is able to undertake strategic decisions with confidence and 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; 3 years of the most recent key financial indicators; turnover & profit estimate for each company and MTW's 'at a glance' chart, enabling the reader to quickly gauge the current financial health of a company.

Relevant Research, 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 are designed to enable you to engage in fast, effective market analysis. We focus on providing what's important in an easy to reference and use format.

1.2 METHODOLOGY & SOURCES OF INFORMATION

MTW Research employ a wide ranging, reliable methodology in order to ensure the highest quality of information possible. Our reports are uniquely based on **financials from a representative sample** of the industry, supported by **intelligent qualitative research** to provide a comprehensive, intelligent review.

By combining **primary** and **secondary** research information, MTW reports uniquely offer an **unparalleled level of confidence** in terms of market data and expert trend comment. This, coupled with the fact that we've been writing reports on these markets **since 1999** means that we are confident you won't find a better report available. Our *price guarantee* ensures that you won't find the same quality report at a cheaper price.

Sources of information for this report included:-

- **Financial Data** from 180+ Leading Cleaning Equipment Manufacturers & Distributors
- **Discussions** with Manufacturers, Distributors, Retailers & End Users
- **Distribution Outlets Analysis** – including site visits, distributors' product mix etc
- **Product Information** – technical data from manufacturers, distributors etc
- **Company Websites** – Manufacturers, Distributors, End Users, Specifiers etc
- **Annual Reports** – Manufacturers and Distributors' Company Literature
- **Press Releases** – New product launches, company news etc
- **HM Government and European Parliament** – Official Statistics
- **HM Revenue & Customs**
- **Social Media** – Facebook, Twitter, LinkedIn, Instagram etc
- **Trade Journals**, Industry Websites and Industry Commentators
- **Trade Associations**, Conferences and Exhibitions

The research & analysis process involves:-

- **Qualitative Analysis** – collate all primary and secondary information sources
- **Quantitative Data Modeling** – using MTW's proprietary data processing for forecasts
- **Qualitative Review** – review data models against qualitative inputs for trends, sizes etc
- **Product Trend Analysis** – identify & review trends for each key product sector
- **Distribution Channels Review** – channel shares & trends analysis
- **End Use Sectors Review** – identify key target markets, key trends in each sector
- **Strategic Marketing Review** – by qualified, experienced marketing professionals
- **PEST & SWOT** – review of all market influences, opportunities and threats
- **Identify 'Quick Wins'** – List current and future opportunities for market / sales growth
- **Turnover & Profit** – Estimate for every company in report, regardless of size
- **Ranking** – Rank leading companies by sales, profit, net worth and assets.
- **Economic Analysis** – forecasts of GDP, inflation, employment, interest rates etc

The above involves 8-10 weeks of combined research & report production time, resulting in an intelligent, comprehensive and usable report identifying immediate opportunities and offers a strategic perspective of the market.

2. COMMERCIAL CLEANING EQUIPMENT MARKET 2012-2022

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

This report reviews the non-domestic UK cleaning equipment market and further examines cleaning equipment key product sales between 2012 and 2018 with forecasts to 2022. The report provides market size & product mix in 2018 for the key sectors within the overall UK contract cleaning equipment market, including: -

- **Manual Cleaning Equipment** Market 2012-2022
- **Cleaning Chemical** Market 2012-2022
- **Powered Cleaning Equipment** Market 2012-2022
- **Vacuum Cleaners** Market 2012-2022
- **Hard Floor Cleaning** Market 2012-2022
- **Carpet Cleaning** Market 2012-2022
- **Steam & Pressure Cleaning** Market 2012-2022

More detailed definitions of each market are found within the three main product sector sections and outline the products that fall under each category and any products that have been excluded for this report. The term 'commercial' includes applications used by **contract cleaners** and **commercial** or **public** organisations.

Unless otherwise stated, all prices in this report are measured at manufacturers selling prices excluding any value added tax, other taxes and delivery charges.

The commercial cleaning equipment market is currently valued at some £xxx billion in 2018, reflecting an xxx of around xxx % of the 2017 value of £ xxx billion. The sector is indicated to have xxxx xxxx xxxxxxxx in the last few months, in part due to xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx, but this is very much in line with xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx economy after xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx and subsequent xxxx xxxx xxxxxxxx in business xxxx xxxx xxxxxxxx and investment.

Since 2012, total market value has increased by some xx%, reflecting a sector which has experienced reasonable xxxx xxxx xxxxxxxx trading conditions, albeit with xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx economic xxxx xxxx xxxxxxxx of xxxx xxxx xxxxxxxx. However the xxxx xxxx xxxxxxxx in the market was then followed by xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx performance from H2 xxx onwards to annual growth levels of around x% per annum.

Forecasts for the market are xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx, though xxxx xxxx xxxxxxxx levels of xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx as a result of the xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx post June 2017 are indicated to have xxxx xxxx xxxxxxxx volume demand and xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx in the near term. Nevertheless, our forecast models suggest that the market is set to experience xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx x% in the next 4 years.

xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx cleaning equipment have continued to gain share in the last couple of years as a result of xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx coupled with rising xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx levels and a xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx in the xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx of the market. Consequently manual cleaning equipment has seen a xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx over the last 6 years, as xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx is xxxx xxxx xxxxxxxx to xxxx xxxx xxxxxxxx manual xxxx xxxx xxxxxxxx methods.

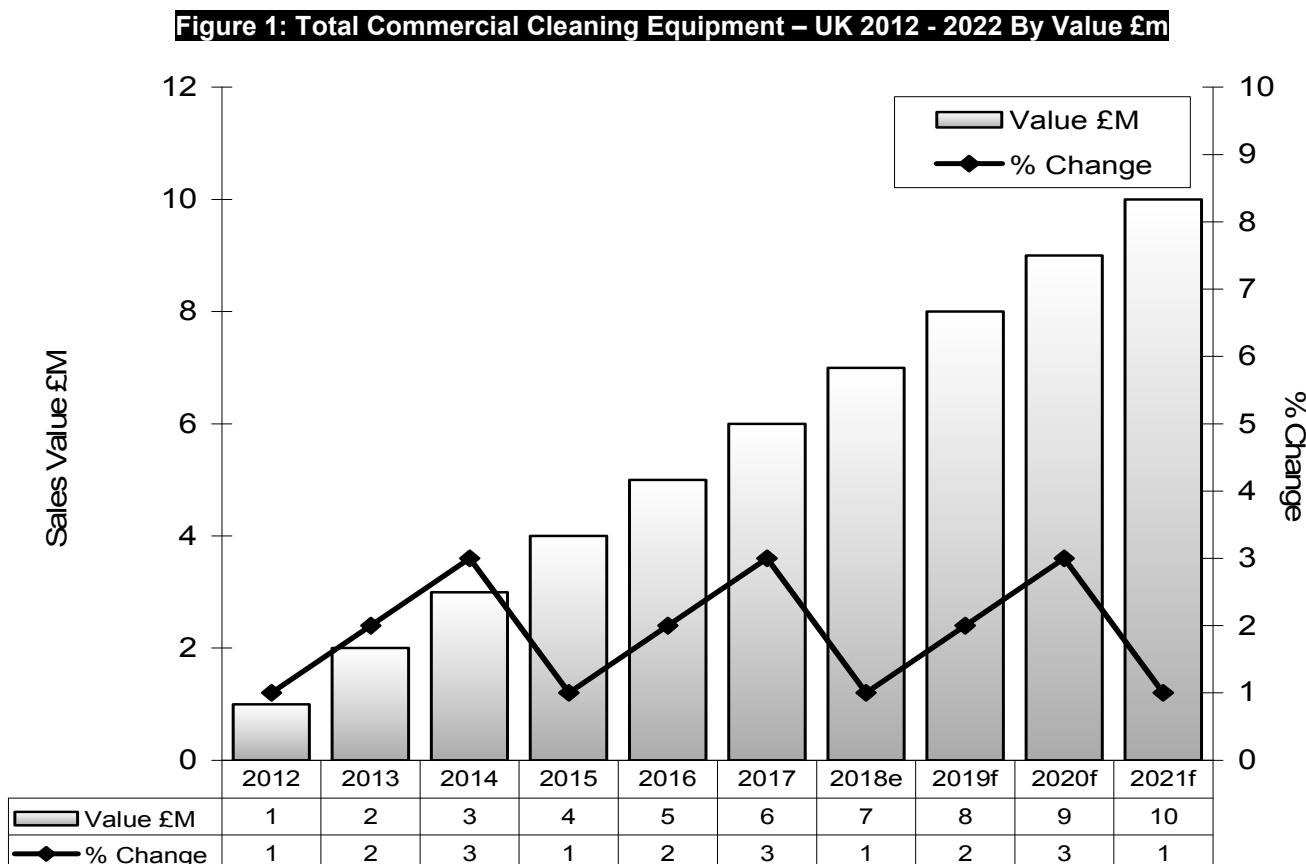
Within the powered cleaning equipment sector, xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx have exhibited the strongest growth since 2012. Thanks largely to xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx; manufacturers have been able xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx products through xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx. Many hard floor cleaners are xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx, reducing xxxx xxxx xxxxxxxx xxxx xxxx xxxxxxxx the user to purchase multiple m xxxx xxxx xxxxxxxx as well as enhancing xxxx xxxx xxxxxxxx.

Cleaning chemicals have also

2.2 UK COMMERCIAL CLEANING EQUIPMENT MARKET 2012-2022

The UK Commercial Cleaning Equipment Market is currently valued at around £xx billion at manufacturers selling prices in 2018, having exhibited xxxx, albeit xxxxxxxx in recent years.

The following chart illustrates our estimates of the performance of the UK Commercial Cleaning Equipment Market since 2012, with forecasts to 2022 (figures changed for sample purposes):-



Source: MTW Research / Trade Estimates

The performance of the commercial cleaning equipment market can be segmented into distinct phases since 2012, with the xxxx xxxx xxxxxxxx xxxx xxxx xxxx having had a significant and long lasting impact on the industry.

During xxx, the market continued to experience reverberations from the xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx, resulting in xxxx xxxx xxxxxxxx xxxx xxxx xxxx growth in the market as xxxx xxxx xxxxxxxx xxxx xxxx xxxx remained xxxx xxxx xxxxxxxx xxxx xxxx xxxx xxxx xxxx confidence and xxxx xxxx xxxx xxxx investment xxxx xxxx xxxx xxxx. Whilst the xxxx xxxx xxxxxxxx xxxx xxxx xxxx to some extent xxxx xxxx xxxx xxxx, investment generally xxxx xxxx xxxx xxxx with the xxxx xxxx xxxx xxxx slowly improving in H2 xx.

Performance since xxxx began to slowly improve as the economy continued to strengthen, resulting in sales growth accelerating during xxx and a particularly

buoyant xxx boosted by both xxxx xxxx xxxxxxx and xxxx xxxx xxxxxxx activity generating xxxx xxxx xxxxxxx xxxx xxxx xxxxxxx downstream for xxxx xxxx xxxxxxx.

xxxx xxxx xxxxxxx levels of performance continued xxxx xxxx xxxxxxx xxxx xxxx xxxxxxx as the xxxx xxxx xxxxxxx positive signs, though xxxx xxxx xxxxxxx expenditure xxxx xxxx xxxxxxx under the xxxx xxxx xxxxxxx xxxx xxxx xxxxxxx. Nevertheless, xxxx xxxx xxxxxxx in most commercial end use sectors continued to xxxx xxxx xxxxxxx throughout xxx with the year ending on xxxx xxxx xxxxxxx xxxx xxxx xxxxxxx levels just under x%.

Performance in

2.3.1 Cleaning Equipment Trends in 2018 and Growth Opportunities

Given the maturity of the UK commercial cleaning equipment market, the sector has become increasingly reliant on product xxxx xxxx xxxxxx in order to generate value growth in a sector where volume demand growth xxxx xxxx xxxxxx muted in recent years due xxxx xxxx xxxxxx xxxx xxxx xxxxxx.

xxxx xxxx xxxxxx represents a key area of opportunity in 2018, with manufacturers xxxx xxxx xxxxxx products and xxxx xxxx xxxxxx in order to xxxx xxxx xxxxxx xxxx xxxx xxxxxx

Some examples of xxxx xxxx xxxxxx xxxx xxxx xxxxxx and xxxx xxxx xxxxxx tactics employed in 2018 which are set to provide value growth through to 2022 across all three main markets include:

Powered cleaning products

- xxxxxx functionality
- xxxxxx function
- xxxxxx xxxxxx
- Reinforced xxxxxx
- Long xxxxxx
- xxxxxx xxxxxx handles
- Multiple xxxxxx
- xxxxxx xxxxxx
- xxxxxx / xxxxxx

Cleaning Chemicals

- 'xxxxxx credentials
- xxxxxx xxxxxx free
- xxxxxx xxxxxx manufacturing process

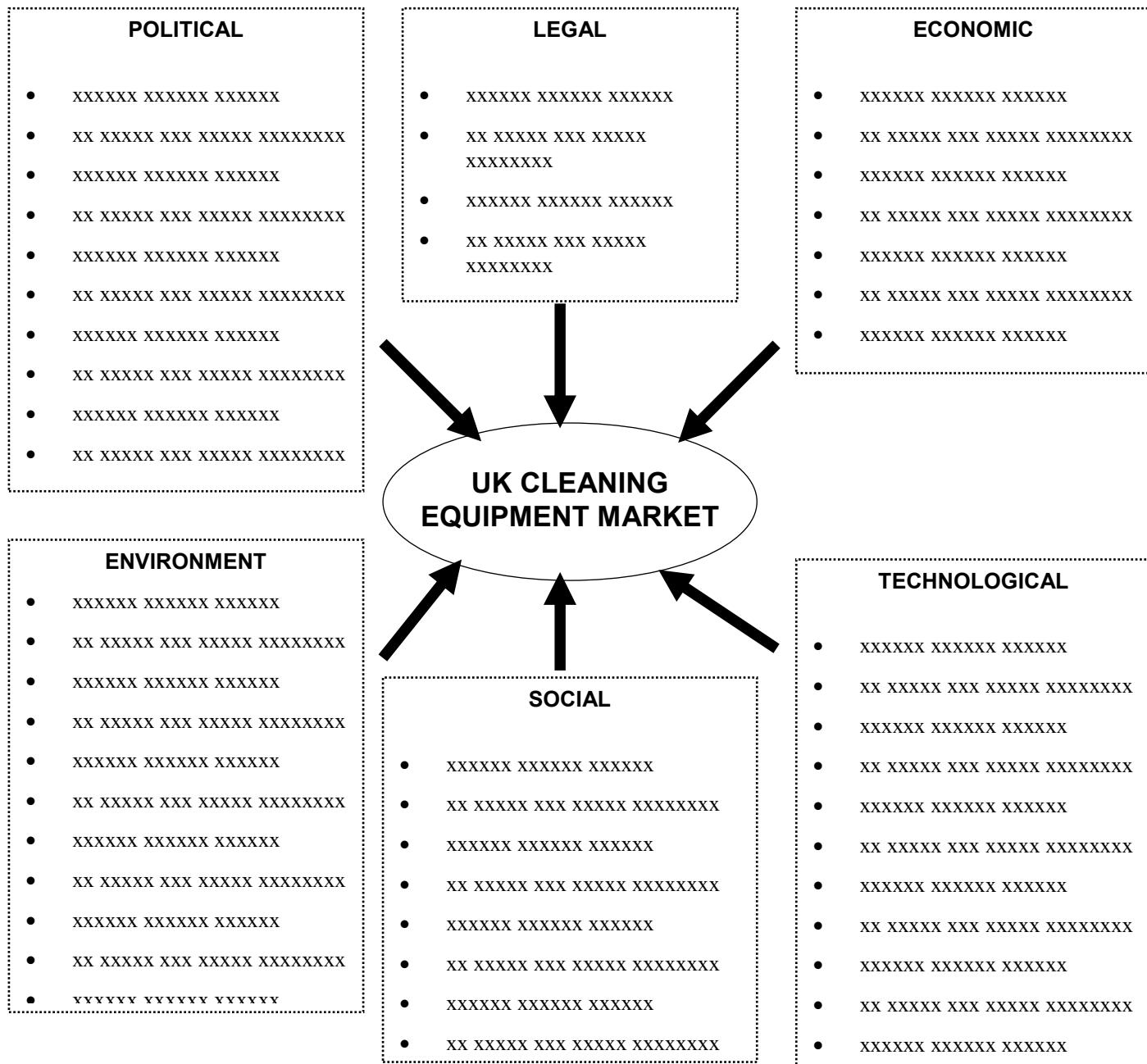
Manual Cleaning Products

- xxxxxx
- xxxxxx materials
- Extra xxxxxx
- xxxxxx xxxxxx storage (Trolleys / carts)
- Most popular or colours include:-
 1. xxxxxx
 2. xxxxxx finish
 3. xxxxxx
- Most popular 'on trend' finishes include:-
 1. xxxxxx
 2. xxxxxx I

3.2 PEST ANALYSIS – ILLUSTRATION OF KEY MARKET FORCES

There are a large number of macro market issues and trends which directly or indirectly influence the UK Commercial Cleaning Equipment market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 5: PEST Analysis for UK Commercial Cleaning Equipment Market



Source: MTW Research Strategic Review 2018

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

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

Figure 11: Key Strengths & Weaknesses in the Cleaning Equipment Market 2018-2022

Source: MTW Research Strategic Review 2018

Key opportunities and threats evident in the market at present include:-

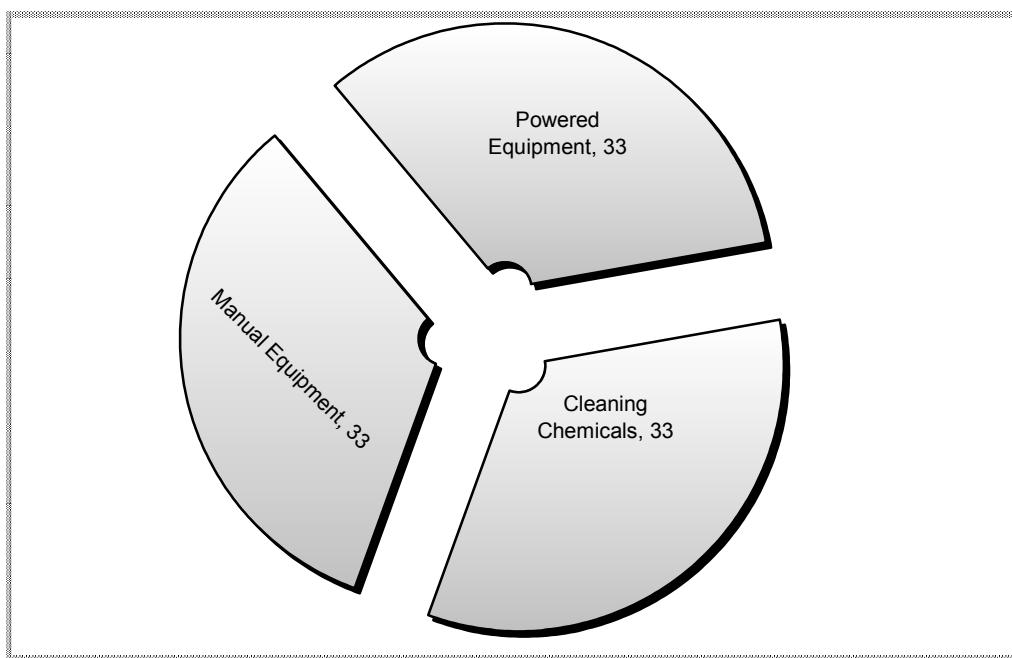
Figure 12: Key Opportunities & Threats in the Cleaning Equipment Market 2018-2022

4. COMMERCIAL CLEANING EQUIPMENT MARKET SHARES & TRENDS

4.1 Share by Cleaning Chemicals, Manual & Powered Cleaning Equipment Sectors – 2018, 2012 and 2022

The UK non-domestic cleaning equipment market comprises of a wide range of product sectors which can be generally divided into manual, chemical and powered cleaning products. The share accounted for by these three main sectors within the UK commercial cleaning equipment market in 2018 is illustrated in the following chart (figures changed in sample):-

Figure 13: Commercial Cleaning Equipment Product Sectors Share % 2018



Source: MTW Research / Trade Sources

As shown above, xxxxx currently dominate the market with a share of xx% reflecting an estimated value of around £xxx million to year-end December 2018, reflecting an xxxxxxx of around 3% by the end of 2018.

Powered equipment is the

5 POWERED CLEANING EQUIPMENT MARKET 2012-2022

5.1 Vacuum Cleaners Market Size & Trends 2012-2022

The following chart illustrates the performance of the vacuum cleaners market by value since 2012 and forecasts to 2022:-

Figure 19: Vacuum Cleaners Market by Value 2012-2022 £M

Redacted in sample

Source: MTW Research / Trade Estimates

Sales of commercial vacuum cleaners are currently estimated to be worth some £xx million at manufacturers selling prices in 2018, with the market forecast to xxxx to around £xxx million by year-end 2022.

As illustrated, the market experienced

The majority of commercial vacuum cleaners fall under these main categories listed below:

- Wet & Dry Vacuum
- Cordless Vacuum
- Wide Area (rotary) Vacuum
- Robotic Vacuum
- Back Pack Vacuum
- Dry Tub Vacuum
- Upright Vacuum
- Hazardous Waste Vacuum

Pricing

Prices start

5.2 Hard Floor Cleaning Machines Market Size & Trends 2012-2022

The following chart illustrates the performance of the Hard Floor Cleaning Machines Market by value since 2012 and forecasts to 2022:-

Figure 20: Hard Floor Cleaning Machine Market by Value 2012-2022 £M

Redacted in sample

Source: MTW Research / Trade Estimates

The commercial hard floor machine market is the

6 END USE SECTORS SHARES FOR COMMERCIAL CLEANING

The following section identifies the key end use target markets for the UK contract cleaning equipment market and provides an illustration of historical market share in 2012, current share in 2018 and provides a forecast share for 2022.

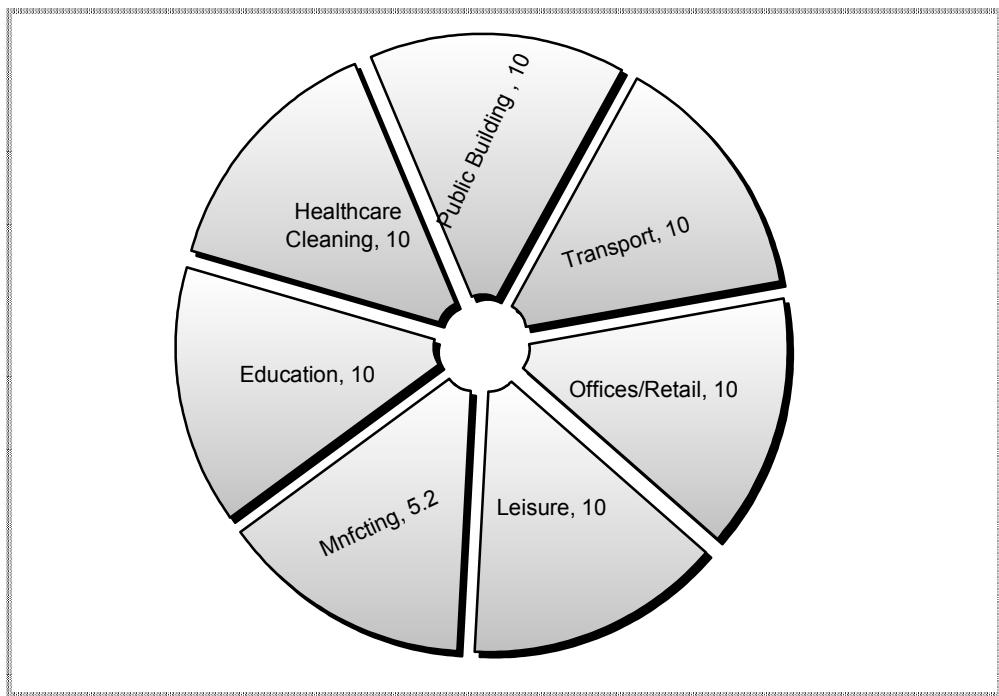
The commercial cleaning equipment market is heavily influenced by the contract cleaning & FM sector, which accounts for a large proportion of market sales at around x%. Tool hire is also xxxxxxxx accounting for around x% of the total market in 2018.

The remainder is generally accounted for xxxxxxxxxxx companies that employ xxxxxxxxx(8%); with some demand from xxxxxx end users such as independent xxxxxxxxxxx (6%), who purchase on a more xxxxxx basis at the xxxxxx value end of the market. An overview of the contract cleaning market is discussed in section 2 of this report, with MTW also having published 2 separate more detailed reports on Contract Cleaning and the Facilities Management Markets.

6.1 Cleaning Equipment Share by End Use Sector 2012, 2018 & 2022

The commercial cleaning equipment 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 2018 by value (figures changed in sample):-

Figure 23: Share by Key End Use Sector In Commercial Cleaning Equipment Market 2018



Source: MTW Research / Company Accounts

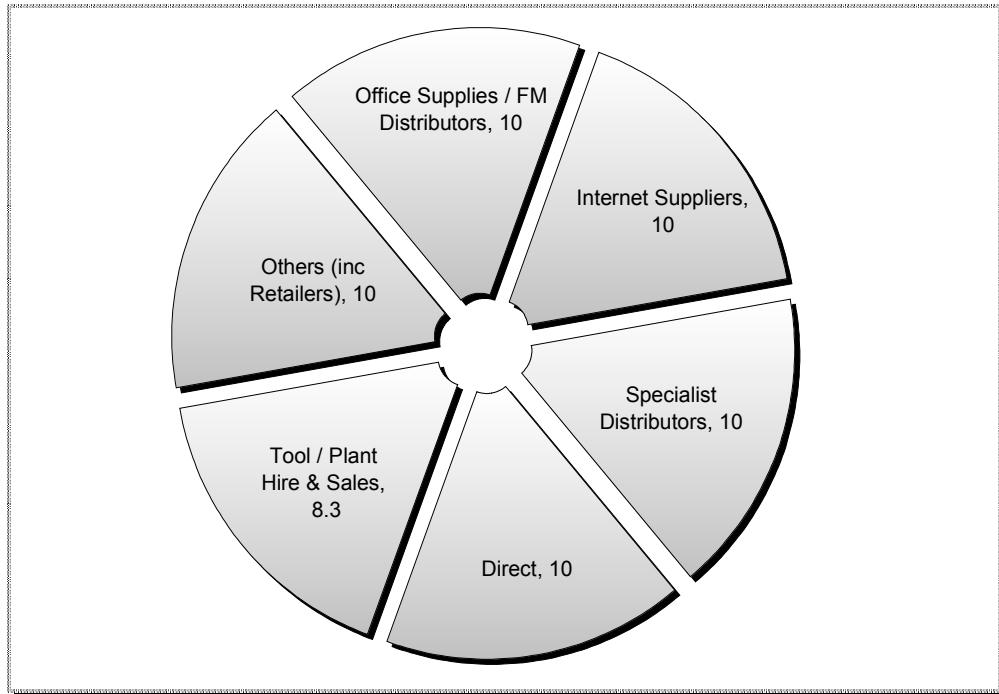
As the above chart illustrates, the xxxx sector accounts for the largest proportion of the commercial cleaning equipment market in 2018 with just under 25%, closely followed by the xxxxx sector which is estimated to account for around 24%.

7 DISTRIBUTION CHANNEL SHARES FOR COMMERCIAL CLEANING EQUIPMENT

7.1 Share By Key Distribution Channel 2012, 2018, 2022

The following chart illustrates our estimates of the mix by key distribution channels within the UK Commercial Cleaning Equipment Market in 2018 (figures changed in sample):-

Figure 27: Cleaning Equipment Market Share by Key Distribution Channels 2018



Source: MTW Research / Company Accounts

As illustrated, the

8 CLEANING EQUIPMENT MANUFACTURER PROFILES

The following section identifies some of the key UK commercial cleaning equipment/material manufacturers and suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

8.1 Commercial Cleaning Manufacturers Profiles & KPIs

Sample Co Ltd - Company Overview & 'At a Glance'

Address 1

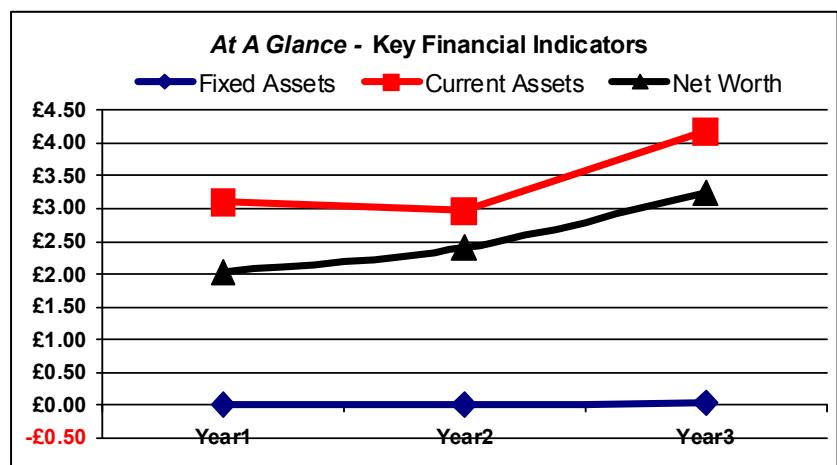
Address 2

County

Postcode

Tel: Sample

Sample Co Ltd is a private limited company, incorporated on 9th March 2001. The company's main activities are recorded by Companies House as "Wholesale Of Chemical Products." In 2018, the company has an estimated 1800 employees.



To year end December 2017, Sample Co Ltd is estimated to have achieved a turnover of around £350 million. Pre-tax profit for the same period is estimated at around £50 million. The following table briefly provides a top line overview on Sample Co Ltd:-

Company Name	Sample Co Ltd
Brief Description of Activities	Wholesale Of Chemical Products.
Parent Company	Sample Co
Ultimate Holding Company	Sample Co
Estimated Number of Employees	1800
Senior Decision Maker / Director	David Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

Sample Co Ltd - 3 Year Financials to Year End 31-Dec-16

Key Indicator £M	Year End 31-Dec-14 (Year1) £M	Year End 31-Dec-15 (Year2) £M	Year End 31-Dec-16 (Year3) £M
Fixed Assets	£0.01	£0.0	£0.03
Current Assets	£3.1	£2.97	£4.18
Current Liabilities	£1.08	£0.57	£0.96
Long Term Liabilities	-	-	-
Net Worth	£2.03	£2.4	£3.25
Working Capital	£2.02	£2.4	£3.22
Profit per Employee	-	-	-
Sales per Employee	-	-	-

9. CLEANING EQUIPMENT DISTRIBUTORS PROFILES

The following section identifies some of the key UK commercial cleaning equipment distributors and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

9.1 Cleaning Distributors Profiles & 3 Year Financials

Sample Co Ltd - Company Overview & 'At a Glance'

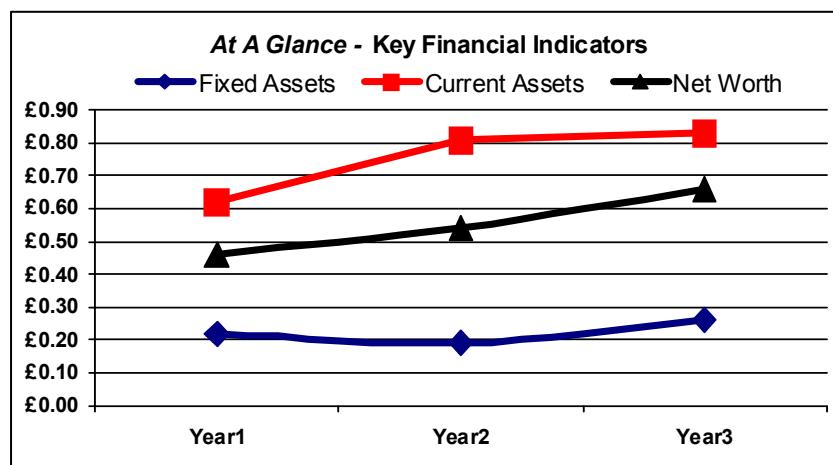
Sample Road

Sample Town

Postcode

Tel: Sample

Sample Co Ltd is a private limited company, incorporated on 30th September 1974. The company's main activities are recorded by Companies House as "Sale Of Janitorial Supplies." In 2018, the company has an estimated 10-20 employees.



To year end December 2017, Sample Co Ltd is estimated to have achieved a turnover of around £2.5 million. Pre-tax profit for the same period is estimated at around £0.10 million. The following table briefly provides a top line overview on Sample Co Ltd:-

Company Name	Sample Co Ltd
Brief Description of Activities	Sale Of Janitorial Supplies.
Parent Company	
Ultimate Holding Company	
Estimated Number of Employees	10-20
Senior Decision Maker / Director	Alfred Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

Sample Co Ltd - 3 Year Financials to Year End 31-Mar-17

Key Indicator £M	Year End 31-Mar-15 (Year1) £M	Year End 31-Mar-16 (Year2) £M	Year End 31-Mar-17 (Year3) £M
Fixed Assets	£0.22	£0.19	£0.26
Current Assets	£0.62	£0.81	£0.83
Current Liabilities	£0.38	£0.47	£0.43
Long Term Liabilities	-	-	-
Net Worth	£0.46	£0.54	£0.66
Working Capital	£0.25	£0.34	£0.4
Profit per Employee	-	-	-
Sales per Employee	-	-	-

