



Contract Cleaning Market *Research & Analysis* UK 2013

Report Sample

Nb. Data has been censored/changed for sample purposes

Contract Cleaning Market Size & Review 2007-2013; SWOT & PEST Analysis, Mix by Service Type 2007-2017; End User Mix 2007-2017; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Trend Forecasts to 2017

4th Edition

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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 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 – 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 2007-2017** – Value of the market since 2007 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 charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2017. 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 2017 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 2007 –2017** – Industry totals and averages since 2007 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 2017.
- **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 MARKET DEFINITION & EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK contract cleaning market comprises myriad services within a broad spectrum of key end use application sectors. This report defines the market and provides market size 2007-2017 and analysis for the following key sectors:-

- **Standard Cleaning** – General cleaning, vacuuming, waste clearing & removal, dusting, polishing, washing & general, non-specific waste management etc.
- **Window & Façade Cleaning** – Internal & external cleaning of windows, facades, framework, cladding etc
- **Specialised Cleaning** - High Level / Difficult Access Cleaning, Builders Cleans / Preparation for 'Snagging', Accommodation Sanitising, Graffiti / Gum Removal, Void / Exit Cleaning, Bed Bug Eradication, Industrial Kitchen Deep Cleaning, 'Superbug' Disinfection / Deep Cleaning / Bacterial / Viral Control, Fire/Flood Damage, Bitumen/Tar removal, Odour Control & Air Management, Floor / Carpet Cleaning / Polishing / Maintenance, Crime / Trauma Scene Cleaning / Sharps Removal, Hazardous Waste Collection and Disposal, Kitchen Duct/Ventilation Cleaning / Grease Extraction, Insurance Compliant Cleaning (Fire Exits, Ducts, Extractors etc), Oil / Chemical Spill, Sewage Contamination Cleaning etc.
- **Associated Services** – Secure key holding, consultancy / advice, repair reporting, snagging etc

This report also provides market share 2007, 2013 & forecasts to 2017 for:-

- **Offices / Retail** – high street stores / outlets, 'out of town' retail units, department stores, supermarkets, office blocks, light commercial units, warehousing, car dealerships etc
 - **Leisure Facilities** – pubs, restaurants, holiday units / parks, leisure centres, leisure destinations etc.
 - **Industry / Manufacturing** – Manufacturing sites, industrial units, production facilities, processing centres etc.
 - **Education** – Nursery, primary, secondary, further & higher education facilities both privately & publicly funded.
 - **Health** – Health & well-being centres, hospices, hospitals, surgeries, practices etc, private & publicly funded.
 - **Public Building** – Including but not limited to civic centres, museums, galleries, local authority sites etc.
 - **Transport** –Transport networks & facilities, train, sea, road, air travel, etc
- Market size estimates provided exclude any VAT or other taxes, insurance premiums etc and are expressed at 'contractors selling prices'. 'Current' and 'real

term' market sizes are provided in order to provide as illustrative depiction of the current trading environment for the UK contract cleaning industry in 2013. MTW reports typically take 8-10 weeks to research & produce to include both primary and secondary research and are compiled by experienced, qualified marketing professionals. The methodology for this 4th edition report included quantitative analysis of financial sales data from 170+ contract cleaners with a combined turnover of more than £4 billion in 2013. The research is unique in that it provides the reader with a 2012 turnover and profit estimate for every company included in the report. This is supported by qualitative research on market trends from a wide range of sources including input from contract cleaning companies & clients, trade journals & magazines, trade associations, industry commentators, HM Government, Companies House, credit reference agencies, company literature and our own experience of researching this market for more than a decade.

To year end December 2013 our estimates are that sales of contract cleaning services will be worth some £xx billion, reflecting an increase of just over xx% since 2012. Whilst the sector has exhibited some xxxx xxxxxx in recent years, overall sales are estimated to have xxxxxx by just over x% since 2007 when the market was valued at £x billion. In early 2013, there appears to be xxxxxx in the xxxxxx of xxxxxx stimulus for the contract cleaning market with sales xxxxxx xxxxxx in the first quarter of the year. However, xxxxxx xxxxxx demand, xxxxxx expenditure in xxxxxx and xxxxxx coupled with anticipated xxxxxx xxxxxx of xxxxxx xxxxxx as the xxxxxx xxxxxx xxxxxx to xxxxxx growth should xxxxxx xxxxxx xxxxxx for the contract cleaning market in the longer term.

In 2013, margins have xxxxxx xxxxxx xxxxxx to 2012, with xxxxxx xxxxxx building following xxxxxx performance in Q4 2011 and Q1 2013. Whilst Q2 2013 is expected to xxxxxx xxxxxx, rather xxxxxx xxxxxx xxxxxx performance, the overall trading environment xxxxxx xxxxxx xxxxxx xxxxxx at present.

'Standard' cleaning services xxxxxx xxxxxx in 2013 with this sector worth around £xx billion, reflecting a share of x% of the total market. The xxxxxx xxxxxx sector is xxxxxx xxxxxx by more specialist cleaning services, with this estimated to be worth some £x billion in 2013. The xxxxxx cleaning sector has experienced xxxxxx levels of xxxxxx in recent years, currently valued at around £x billion, reflecting x xxxxxx of some 3.5% xxxxxx the 2012 value.

The office / retail sector accounts for xxxxxx xxxxxx of the contract cleaning market in 2013 with around x%, xxxxxx xxxxxx by healthcare which is estimated to account for around x%. Leisure and transport sectors are also xxxxxx xxxxxx with x% and x% respectively. Education is estimated to account for around x%, with public buildings accounting for around x% of the overall market. The manufacturing sector xxxxxx xxxxxx xxxxxx than some others in recent years and is currently estimated to account for around x% of the market.

In terms of future prospects, xxxxxx xxxxxx xxxxxx is likely to continue in the contract cleaning market as the number of xxxxxx xxxxxx xxxxxx continues to xxxxxx as a result of xxxxxx xxxxxx xxxxxx and relatively xxxxxx xxxxxx xxxxxx xxxxxx. However, business xxxxxx xxxxxx rates are also expected to remain xxxxxx. The market is expected to xxxxxx by 2017 with a xxxxxx in sales of around x% and an industry worth an estimated £x billion.

2.2 CONTRACT CLEANING MARKET SIZE & TRENDS 2007-2017

2.2.1 Contract Cleaning Market Size 2007-2017 – Current Prices

The performance of the UK contract cleaning market since 2007 is illustrated in the following chart with forecasts to 2017:-

Figure 1: Contract Cleaning Market – UK 2007 – 2017 By Value £m MSP

Sample

Source: MTW Research / Trade Estimates

As illustrated above, the UK contract cleaning market is valued at just under £x billion at current prices in 2013, reflecting a substantial market and one which has exhibited xxxxxx xxxxxx to the recent xxxxxx xxxxxx in the UK over the last 5-6 years.

To year end December 2013 our estimates are that sales of contract cleaning services are likely to xxxxxx by just over x% in current price terms, reflecting relatively xxxxxx xxxxxx in the market in the immediate future. Since 2007, it is estimated that the market has xxxxxx by just over x% from a value of £x billion to current revenue levels of £x billion.

The current size of the contract cleaning market reflects myriad services within a particularly wide range of target markets across both the public and private end use sectors. As illustrated above, performance xxxxxx xxxxxx at present with xxxxxx sales in 2012 giving way to xxxxxx xxxxxx year xxxxxx anticipated for 2013. Trading conditions are indicated to xxxxxx xxxxxx in H1 2013 with xxxxxx xxxxxx to be focused toward xxxxxx xxxxxx as xxxxxx conditions xxxxxx xxxxxx.

The contract cleaning market experienced

2.3 KEY MARKET TRENDS IN THE CONTRACT CLEANING MARKET

The following section reviews some of the key financial performance trends of the UK contract cleaning market since 2007, and forecasts to 2017.

2.3.1 Contract Cleaning Industry Profitability 2007-2017

The following table illustrates the performance of the contract cleaning market in terms of profitability between 2007 and 2013 and provides forecasts to 2017:-

Figure 4: Contract Cleaning Market Profitability – UK 2007 – 2017 £M

REPORT SAMPLE

Source: MTW Research / Trade Estimates

As illustrated above, profitability levels in the contract cleaning market xxxx in xxxx at just under £xxx million, reflecting margins of around x% of total turnover. Between xxxx and xxxx profitability exhibited relatively xxxx xxxx of just over 12% per annum as businesses xxxx xxxx xxxx on contract price. This inevitably resulted in a rapid xxxx in pricing xxxx xxxx xxxx across much of the industry, increasing margin xxxx and xxxx on xxxx xxxx xxxx liquidity.

Profitability troughed xxxx xxxx at x% of total market revenue, xxxx xxxx xxxx trading environment in value terms, despite relatively xxxx xxxx xxxx xxxxxx volume demand. Much of this xxxxxx is indicated to have been due to a rapid xxxxxx in xxxxxx xxxxxx levels as a result of the xxxxxx xxxxxx and xxxxxx xxxxxx, xxxxxx than any significant xxxxxx from within the industry itself.

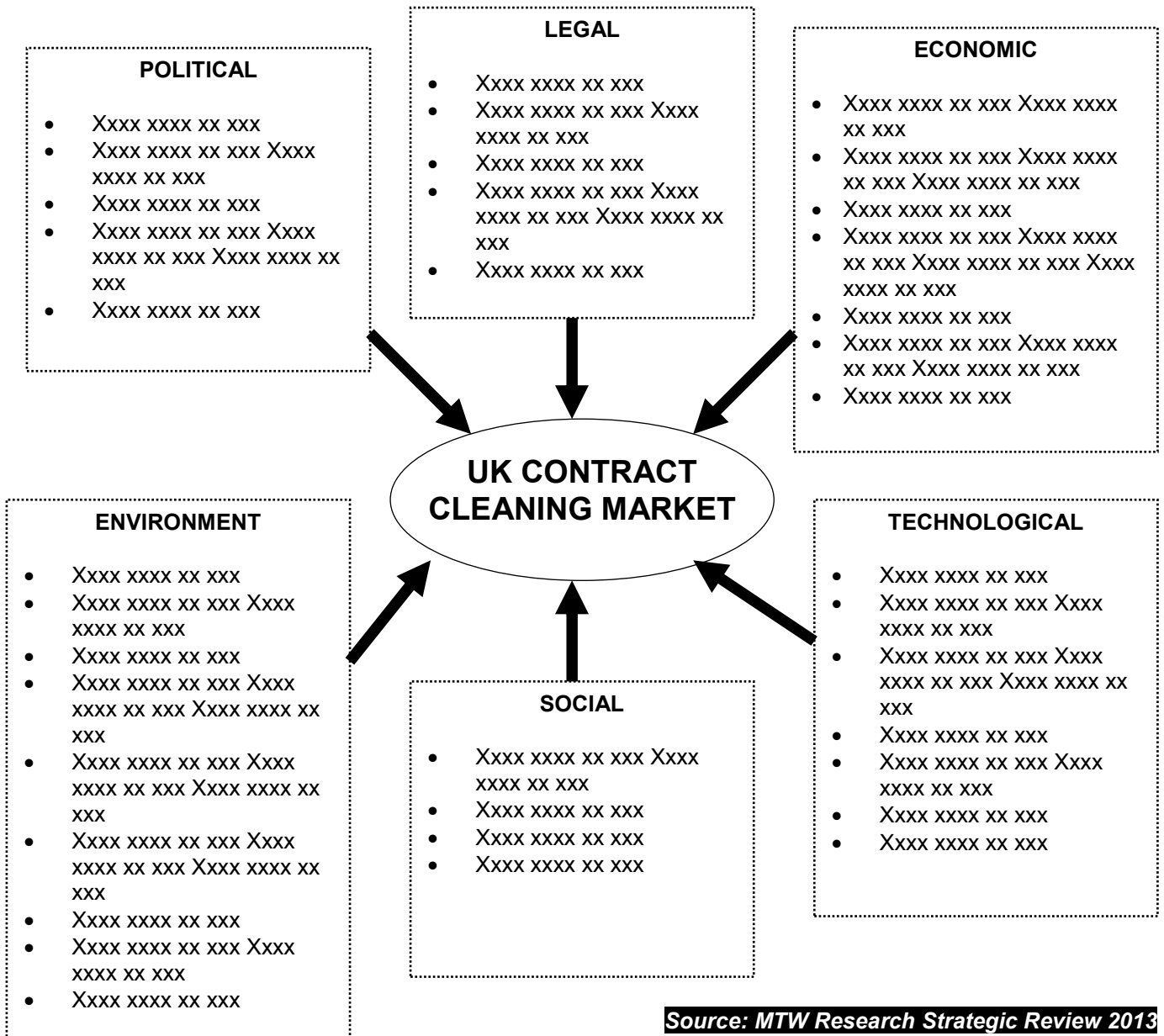
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2. 4 KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

2. 4. 1PEST ANALYSIS – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK contract cleaning 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 13: PEST Analysis for UK Contract Cleaning Market in 2013



Source: MTW Research Strategic Review 2013

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.

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 2013-2017

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX 	<ul style="list-style-type: none"> • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX • XXXXX XXXXXXXX XX XXXXX XXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXXX

Source: MTW Research Strategic Review 2013

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

Figure 19: Key Opportunitites & Threats in the Contract Cleaning Market 2013-2017

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX 	<ul style="list-style-type: none"> • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXXX XXXXXXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXX XXXXX XXXXXXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX • XXXXX XXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX XXXX XXXXX XXXXXXXXXXXX XX XXXX XXXXXXXXXXXX XXXXX XX XXXXXXXX XX XXX XXXXXXXX XXX XXXX

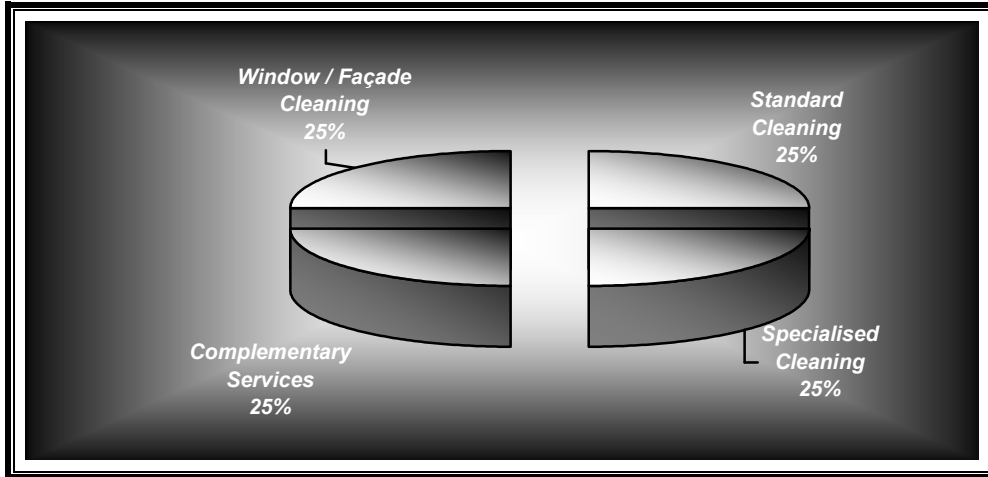
Source: MTW Research Strategic Review 2013

2. 5 CONTRACT CLEANING PRODUCT / SERVICE MIX

2. 5. 1 Share by Contract Cleaning Sector 2007, 2013 & 2017

The share accounted for by each of the key sectors within the UK contract cleaning market in 2013 is illustrated in the following chart:-

Figure 20: Share by Key Product Sector in Contract Cleaning Market 2013



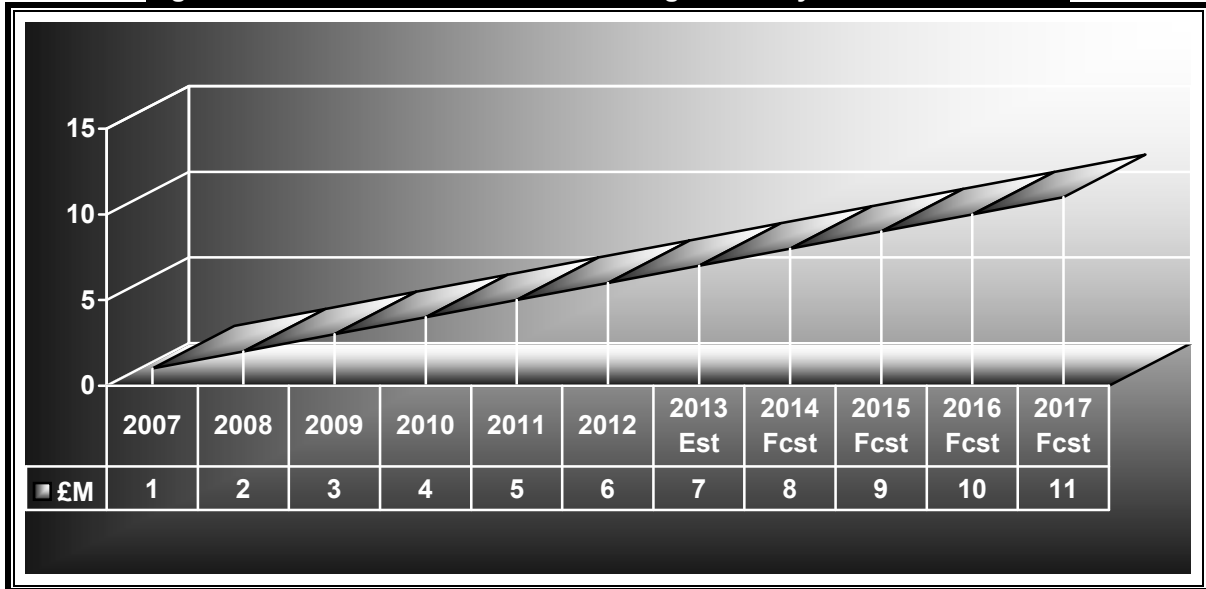
- Figures changed for sample purposes Source: MTW Research / Trade Sources

As the above chart illustrates,

2. 5. 2Standard Contract Cleaning Market 2007-2017

The following chart illustrates the performance of the 'standard cleaning' sector of the contract cleaning market by value since 2007 and forecasts to 2017:-

Figure 23: UK Standard Contract Cleaning Market by Value 2007-2017 £M



Figures changed for sample purposes. Source: MTW Research / Trade Estimates

As illustrated above, the value of the 'standard' cleaning sector is currently valued at just over £

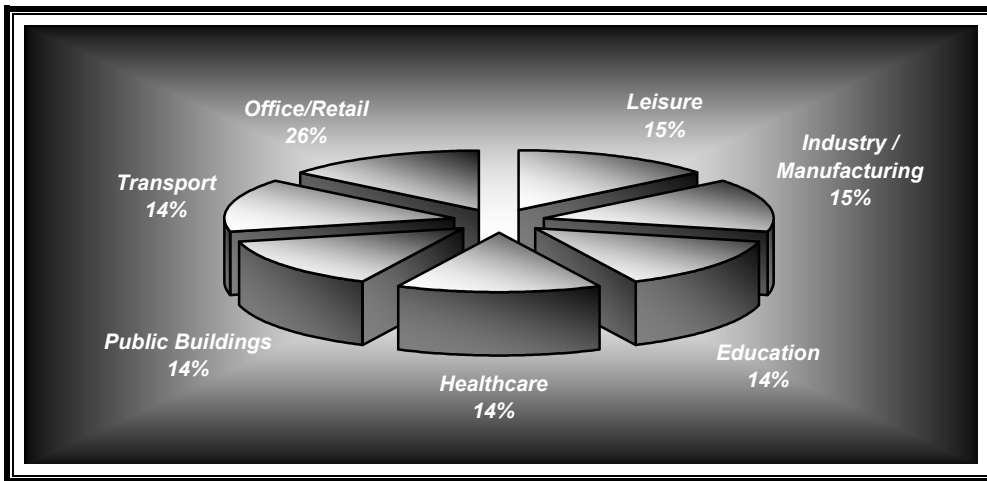
2.6 CONTRACT CLEANING END USER / CHANNEL MIX

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 2007, current share in 2013 and provides a forecast share for 2017.

2.6.1 Share by Key End Use Market 2007, 2013 & 2017

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 2013 by value:-

Figure 26: Share by Key End Use Sector in Contract Cleaning Market 2013



Figures changed for sample purposes. Source: MTW Research / Trade Sources

Due to the fact that there is a considerable overlap between some of the sectors in terms of service provision there are complexities in estimating market share, as such the above figures should be regarded as a guideline only.

As the above chart illustrates

3. THE CONTRACT CLEANING INDUSTRY

3.1 Contract Cleaning Industry Structure in 2013

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 2013

Sample

Source: MTW Research / Company Accounts

The current trading environment represents a

4. RANKINGS FOR CONTRACT CLEANERS IN 2013

4.1 Contract Cleaning Companies Listing

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

Figure 36: Contract Cleaning Company Listing

Able Cleaning Services	Cleaner Care	Graduate Services
Ableclean	Cleanit Contract Services	Greencrest City
Acre Industrial & Cleaning Services	Cleanrite	Greenwich Service Plus
Aim Hygiene Services	Consultant Cleaners	Greenzone Cleaning & Support Services
Alliance Cleaning	Consultant Services Group	Gsf Sandylight
Alliance Cleaning Services UK	Corporate Hygienics	Hall Cleaning Services
Alternative Cleaning	Courtesy Cleaning Services	Hamton Environmental Services
Ambassador Services	Cranes Cleaning Company .	Hayward Services
Andron Contract Services	D P Cleaning Services	Hbs Europe Services
Archgate Cleaning & Support Services	Delta Cleaning Services (Scotland)	Head Office Cleaning Services
Ashbon Services	Deniva Cleaning Services	Hygienic Cleaning Company (UK)
Ashford Cleaning Contractors	Diamond Commercial Cleaning (N Est)	Ideal Cleaning Services
Atlas Cleaning	Douglan Support Services	Indigo Services (UK)
Ayleton Cleaning	Dusters (Wales)	Integrated Cleaning Management
Bespoke Cleaning Contractors	Ecocleen Services	Interclean Commercial
Birkin Cleaning Services	Edwards Commercial Cleaning Services	Inverclean Services
Blitz Cleaning & Maintenance	Enhance Office Cleaning	J & K Commercial Cleaning Services
Bluebay Cleaning Services	Enterprise Cleaning & Support Services	Jani-King (Gb)
Bulloughs Cleaning Services	Enterprise Support Services UK	Jardak Services
Burke & Clemens	Enviroclean (Services)	Just Washroom Services
Bush Brush Cleaners	Euroclean Contractors	Kenkleen
Busy Bee Cleaning	Europa Support Services	KGB Cleaning & Support Services
Cam Specialist Support	Ever Brite Cleaning Services	Lakethorne
Capital Maintenance Services	Exclusive Contract Services	Lcc Support Services
Carlisle Cleaning Services	Executive Cleaning	Lpm Group
Carlton Cleaning Contractors	Facilities Support Partners	Lynn Webster Consultants
Caroline Mondo Cleaning Services	Falcon Cleaning Services	M & D Cleaning Services
Celtic Cleaning	Farnham Office Cleaning Co	Mavis Russell Cleaning
Central Industrial Services	Finclean SKJ	Meridian Contract Services
Chequers Contract Services	Floorbrite Cleaning Contractors	Millard's Cleaning Services
Chrysalis Cleaning	Fluid Options UK	Mitie Cleaning & Envntal Services
Churchill Contract Services	Futures Supplies And Support Services	Monthind
City Cleaning Contractors	Glen Cleaning Company	Naturally Flawless Cleaning Services
Civic Maintenance Services	Glencross Cleaning	North Downs Cleaning & Maintenance
Clarendon	Glenn Management	N-Viro
Classic Cleaning Services	Goldenclean	Ocean Contract Cleaning
Clayton Cleaning Consultants	Goldservice Contract Cleaning	Ocean Group Holdings
Clean Slate (UK)		OCS Group UK
Cleanbright Services		

Office & General Environmental Services	Regular Cleaning Services	Swift Cleaner Services
Optim Contract Services	Rentokil Initial	Temco Facility Services
Origin Retail Property Services	Response Services (UK)	Templewood Cleaning Services
Orion Cleaning Company	Reynard Cleaning (London)	Tewkesbury Cleaning Services
P K M Cleaning	RGS Cleaning	Thames Cleaning & Support Services
Pacemaker Cleaning Services	Ridge Crest Cleaning	Thames Valley Cleaning Services
Paneless Services	Robinson Services	The Carroll Cleaning Company
Peartree Cleaning Services	Sasse	Three C's Cleaning
Phs Group	SCB Services	Tower Group Services
Pinnacle Cleaning Services	Scot Kleen UK	Trendleway Cleaners
Poplars FM	Scotia Clean Teck	Trowbridge Office Cleaning Services
Premier Cleaners	SCS Cleaning Services	Tudor Contract Cleaners
Premier Contract Cleaning	Servest Group	Universal Cleaning
Premier Contract Services (Bristol)	Servicemaster	Vanguard Cleaning Management Solutions
Prime Clean	Smart Cleanings UK	Victoria General Cleaning Services
Principle Cleaning Services	Sofisti-Clean	We Clean
Progressive Cleaning	Solo Service Group	Wetton Cleaning Services
Prokleen UK	Sparkle Cleaning Co. (London)	Wycombe Office Contract Cleaners
Purley Contract Cleaning Co.	Spick & Span Professional Cleaners .	Zonecloth
Quest Contract Services	Supreme Cleaning Services	
Regent Office Care	Sussex Cleaning & Care .	
	Swallow Cleaning Contractors	

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 2012

SAMPLE

Source: MTW Research / Trade Sources

4.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2012:-

Figure 38: Contract Cleaning Companies Sales Estimates 2012

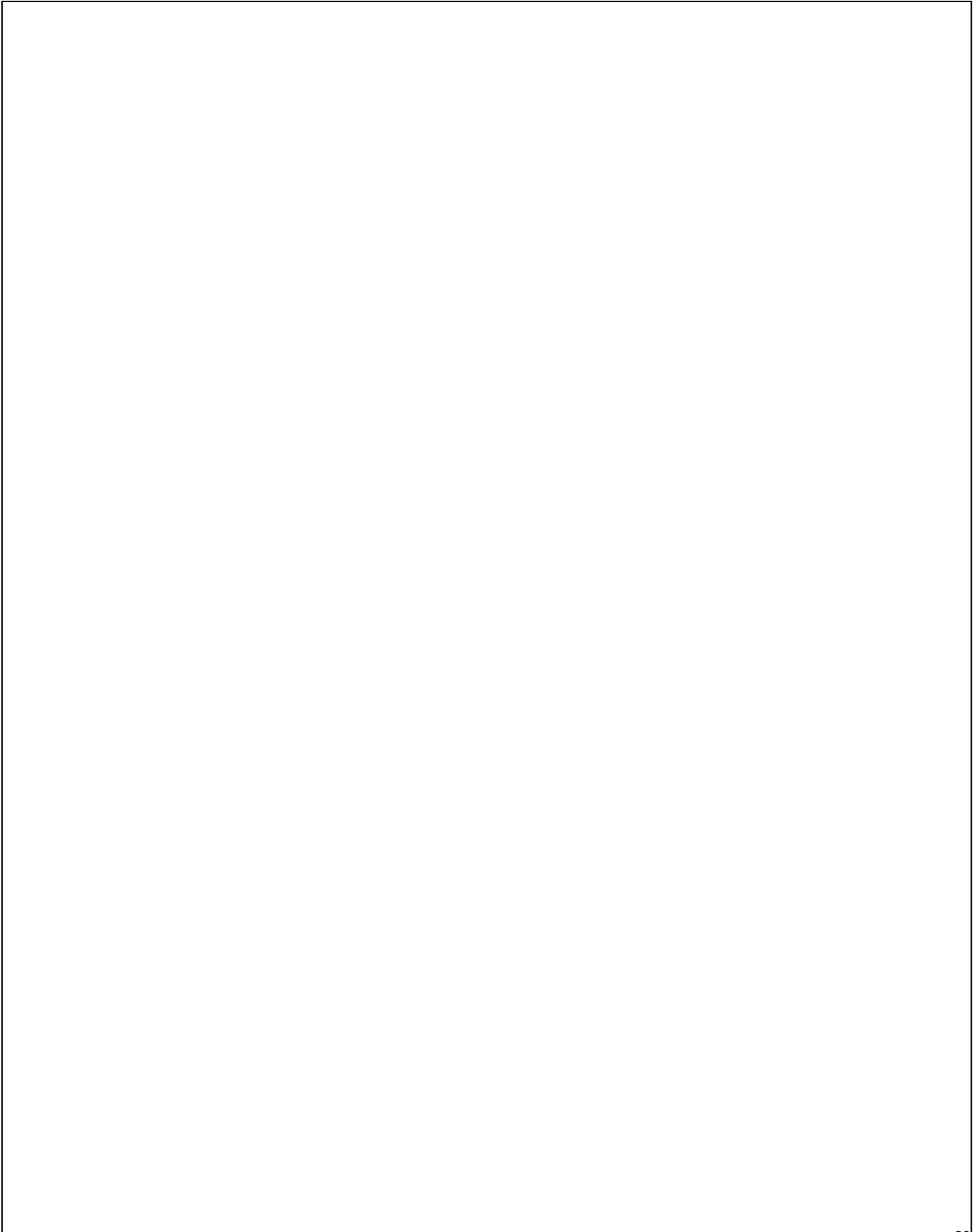
Trading Name	2012 Turnover Estimate £M	2012 Turnover Estimate £M
		£9.0
		£7.7
		£7.1
		£7.0
		£6.7
		£6.5
		£6.4
		£5.5
		£5.4
		£5.3
		£5.0
		£5.0
		£4.5
		£4.5
		£4.4
		£4.3
		£4.2
		£4.1
		£4.0
		£4.0
		£3.9
		£3.7
		£3.6
		£3.5
		£3.0
		£2.9
		£2.4
		£2.4
		£2.3
		£2.2
		£2.2
		£2.0
		£2.0
		£1.9
		£1.8
		£1.8
		£1.7
		£1.7
		£1.7
		£1.7
		£1.6

£1.6	£0.4
£1.5	£0.4
£1.4	£0.4
£1.4	£0.4
£1.4	£0.3
£1.3	£0.3
£1.3	£0.3
£1.3	£0.3
£1.2	£0.3
£1.2	£0.3
£1.2	£0.3
£1.2	£0.2
£1.2	£0.2
£1.1	£0.2
£1.1	£0.2
£1.1	£0.2
£1.1	£0.2
£1.0	£0.2
£1.0	£0.2
£0.9	£0.2
£0.9	£0.2
£0.9	£0.2
£0.8	£0.2
£0.8	£0.2
£0.8	£0.1
£0.8	£0.1
£0.7	£0.1
£0.7	£0.1
£0.7	£0.1
£0.7	£0.1
£0.7	£0.1
£0.6	£0.1
£0.6	£0.1
£0.6	£0.1
£0.6	£0.1
£0.6	£0.1
£0.5	£0.1
£0.5	£0.1
£0.5	£0.1
£0.5	£0.1
£0.4	£0.1
£0.4	£0.1
£0.4	£0.1
£0.4	£0.1
£0.4	£0.1
£0.4	£0.1
£0.4	£0.1
£0.4	£0.1

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 2012:-

Figure 39: Contract Cleaning Companies Ranked By Profit 2012



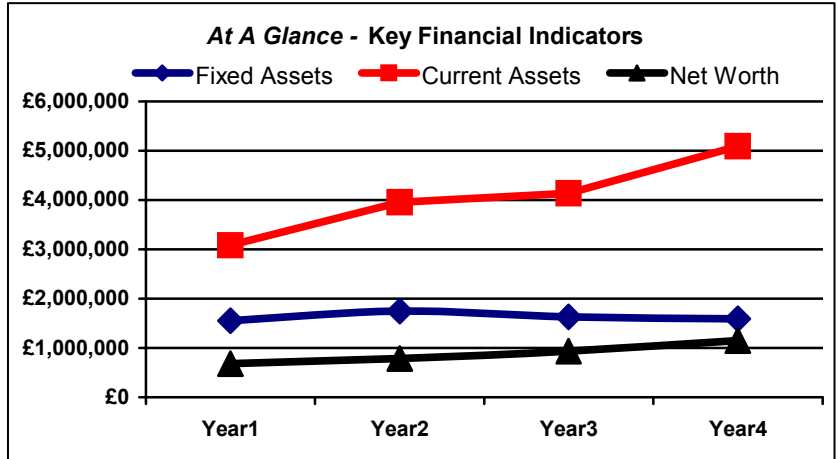
5. CONTRACT CLEANERS PROFILES & 'AT A GLANCE'

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 Co Ltd - Company Overview & 'At a Glance'

Address 1
Address 2
Address 3
Postcode
Tel

Sample Co Ltd is a private limited with share capital company, incorporated on September 19, 1949. The company's main activities are recorded by Companies House as "Providing cleaning services, grounds and minor maintenance." In 2012, the company has an estimated 2100 employees.



To year end December 2011, Sample Co Ltd is estimated to have achieved a turnover of around £29.0 million. Pre-tax profit for the same period is estimated at around £1.30 million. The following table briefly provides a top line overview on Sample Co Ltd:-

Company Name	Sample Co Ltd
Brief Description of Activities	Providing cleaning services, grounds and minor maintenance.
Parent Company	-
Ultimate Holding Company	-
Estimated Number of Employees	2100
Senior Decision Maker / Director	Nicola, Sample

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

Sample Co Ltd - 4 Year KPIs to Year End 31-Mar-12

Key Indicator £	Year End 31-Mar-09 (Year1)	Year End 31-Mar-10 (Year2)	Year End 31-Mar-11 (Year3)	Year End 31-Mar-12 (Year4)
Fixed Assets	£1,551,470	£1,745,330	£1,627,749	£1,586,545
Current Assets	£3,078,528	£3,959,040	£4,141,361	£5,092,404
Current Liabilities	£3,602,161	£4,493,473	£4,469,578	£5,247,699
Long Term Liabilities	£344,123	£428,358	£365,957	£282,437
Net Worth	£683,714	£782,539	£933,575	£1,148,813
Working Capital	£-523,633	£-534,433	£-328,217	£-155,295
Profit per Employee	£460	£366	£577	£588
Sales per Employee	£14,113	£12,325	£13,567	£13,380

REPORT SAMPLE END