Facilities Management Market

Research & Analysis

UK 2012

REPORT SAMPLE

N.B. Figures in Charts Have Been Changed For Sample Purposes

Facilities Management Market Size & Review 2006-2012; SWOT & PEST Analysis, Mix by Service Type 2006-2016; End User Mix 2006-2016; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Forecasts to 2016

4th Edition

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Research & Analysis Report Contents

Market Report Tables & Charts

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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.

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

1.1Key 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, 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 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 Research & Analysis Reports

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

THE MARKET, PRODUCTS/SERVICES & END USE SECTORS

- **Market Size & Key Market Trends 2006-2016** – 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 & disseminate charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2016. 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 & 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 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 2016 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 & mix by location type (e.g head office/branch etc).

- **Industry Trends 2006–2016 –** 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 2016.

- **Supplier Review** – This report provides vital intelligence of relevant and leading players in this market. Each company is ranked 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 also provides turnover estimates for every company, regardless of size, enabling the reader to easily identify individual market shares.

2. UK FACILITIES MANAGEMENT MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Facilities Management market comprises of a wide range of activities within myriad public and private end use sectors. Valued at just under than £xx billion in 2012, this 4th edition report reviews the size, market trends and influences for facilities management contractors and the implications of these trends for suppliers of equipment, products and materials to the UK FM industry.

The Facilities Management market comprises of the following key market sectors, with this report reviewing and providing market share since 2006, with forecasts to 2016 for each of the following key market sectors:-

- **Integrated / Bundled Facilities Management**
- **Property & Operations & Maintenance**
- **Office Support Services**
- **Security**
- **PFI / PPP FM**
- **Contract Catering**
- **Contract Cleaning**

In addition to analysis of these sectors, the report also reviews market trends and shares accounted for by the key end use sectors since 2006, with forecasts to 2016. More specifically, end use markets quantified and analysed include:-

- **Education (private & public)**
- **Health (private & public)**
- **Central & Local Government**
- **Social Housing**
- **Financial / Professional**
- **Transport / Logistics**
- **Utilities**
- **Technological / Communications**
- **Manufacturing**
- **Retail**
- **Property Management**
- **Leisure**

The research methodology for this report included quantitative analysis of financial data from more than 100 FM contractors coupled with primary research information through trade interviews, credit reference agencies, Companies House, FM contractor reports & websites and discussions with key end use clients. This is supported by secondary research from industry magazines, trade commentators, HM Government, HM Customs and other sources including our own experience of researching this market for more than a decade.

The UK facilities management market is currently estimated to be worth some £x billion in 2012 at contractor selling prices, reflecting a forecast xxxxxxx of just under x% to year end December 2012. During 2011, the market experienced a xxxxxxx in terms of overall sales growth as xxxxxxx remained xxxxxxx and the xxxxxxx remains xxxxxxx xxxxxxx. The double-dip recession in late 2011/early 2012 has xxxxxxx xxxxxxx xxxxxxx market overall with client xxxxxxx remaining xxxxxxx xxxxxxx, xxxxxxx xxxxxxx xxxxxxx growth in average contract values and volume demand.

Given a relatively shallow and short-lived second recession and lack of contagion spreading from the Euro debt crisis, our forecasts are for xxxxxxx xxxxxxx xxxxxxx in the near term, with xxxxxxx xxxxxxx xxxxxxx xxxxxxx likely in the medium to longer term. Clearly market performance remains xxxxxxx at present, with the majority of FM contractors xxxxxxx xxxxxxx xxxxxxx contracts and clients to maintain or grow sales. However, much of the industry has xxxxxxx xxxxxxx xxxxxxx liquidity and flexibility and have xxxxxxx well to the xxxxxxx xxxxxxx rates of growth in the market in recent years through enhancing xxxxxxx xxxxxxx practices. In mid 2012, our research suggests that more than x% of UK FM contractors have a credit rating between 'xxxxxx' and 'excellent', indicating a xxxxxxx of underlying xxxxxxx in the market.

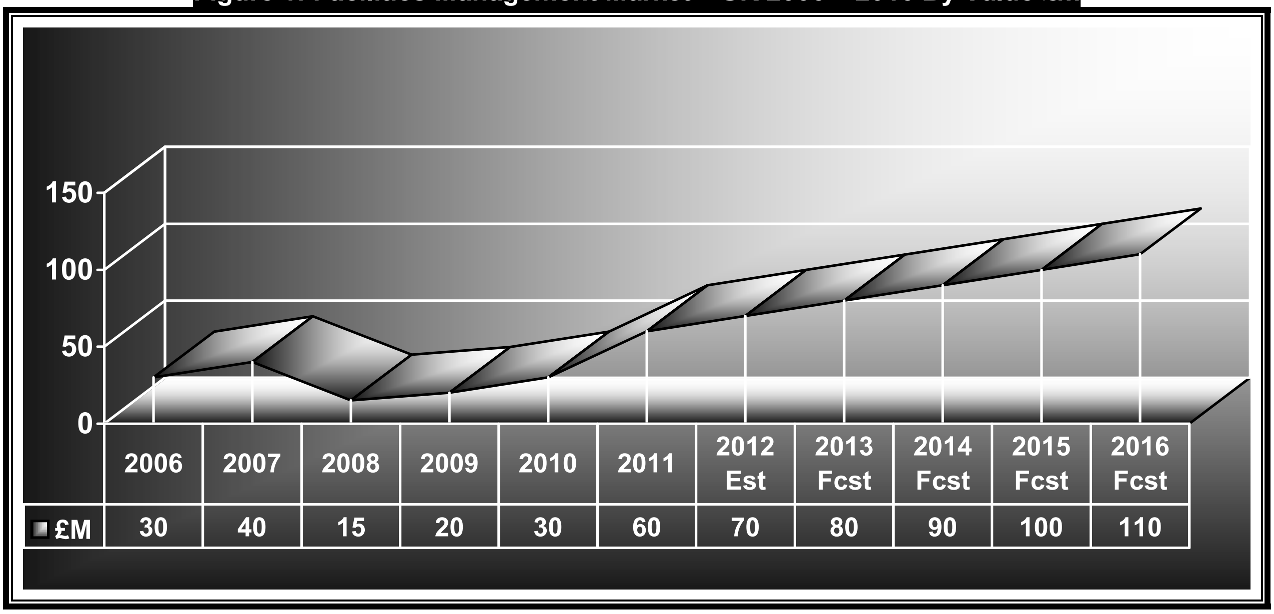
Prospects for value growth at present are indicated to primarily revolve around FM contractors'

2.2FACILITIES MANAGEMENT MARKET SIZE & TRENDS 2006-2016

2.2.1 Facilities Management Market Size 2006-2016 – Current Prices

The UK Facilities Management market encompasses a wide range of services and is estimated to be worth just over £x billion in 2012 as illustrated in the following chart:-

Figure 1: Facilities Management Market – UK 2006 – 2016 By Value £m



Source: MTW Research / Trade Estimates – Figures changed in sample

As illustrated in the above chart, the UK facilities management market is estimated to have increased by just under x% since 2006, reflecting a reasonably xxxxxxx performance against a backdrop of xxxxxxx macro economic conditions - particularly in xxxxxxx and xxxxxxx.

The continued trend towards xxxxxxx and xxxxxxx xxxxxxx seeking to xxxxxxx xxxxxxx xxxxxxx in order to focus on their xxxxxxx continues to provide a key stimulus for the FM market in 2012 and is indicated to have prevented any xxxxxxx xxxxxxx xxxxxxx value in recent years. The ability for clients of FM contractors to xxxxxxx xxxxxxx xxxxxxx and xxxxxxx xxxxxxx xxxxxxx continues to represent a key market driver for the FM market which has continued to underpin turnover growth in recent years. Between 2006 and early 2008 the market was predominantly driven by xxxxxxx xxxxxxx xxxxxxx xxxxxxx xxxxxxx growth. Further, xxxxxxx mid 2012 xxxxxxx also kept pace or outperformed xxxxxxx and xxxxxxx growth in the FM sector, underpinning xxxxxxx xxxxxxx for the xxxxxxx xxxxxxx industry

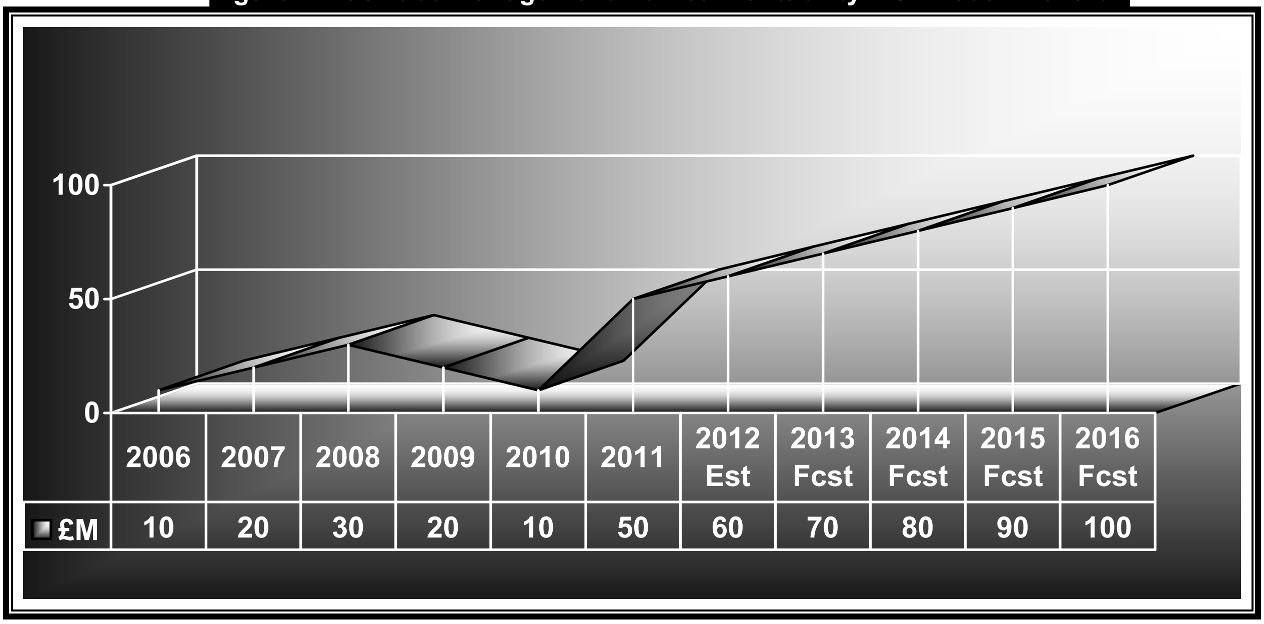
2.3 KEY MARKET TRENDS IN THE FACILITIES MANAGEMENT MARKET

The following section reviews some of the key trends in terms of financial performance of the UK Facilities Management market since 2006, and forecasts to 2016.

2.3.1 Facilities Management Industry Profitability 2006-2016

The following table illustrates the performance of the Facilities Management market in terms of profitability between 2006 and 2012 and provides forecasts to 2016:-

Figure 4: Facilities Management Market Profitability – UK 2006 – 2016 £M



	2006	2007	2008	2009	2010	2011	2012 Est	2013 Fcst	2014 Fcst	2015 Fcst	2016 Fcst
£M	10	20	30	20	10	50	60	70	80	90	100

Source: MTW Research / Trade Estimates – Figures Changed in Sample

Profitability levels in the Facilities Management market peaked in xxxxxxx at just under £ xxxxxxx billion, reflecting margins of around x% of total turnover. Between xxxxxxx and xxxxxxx, total profitability xxxxxxx by around x% supported by demand from xxxxxxx xxxxxxx xxxxxxx xxxxxxx markets. This growth also reflected improving margins as the industry focused on xxxxxxx and xxxxxxx, coupled with xxxxxxx xxxxxxx - in part due to rapid growth in the xxxxxxx xxxxxxx xxxxxxx xxxxxxx xxxxxxx xxxxxxx of the FM industry.

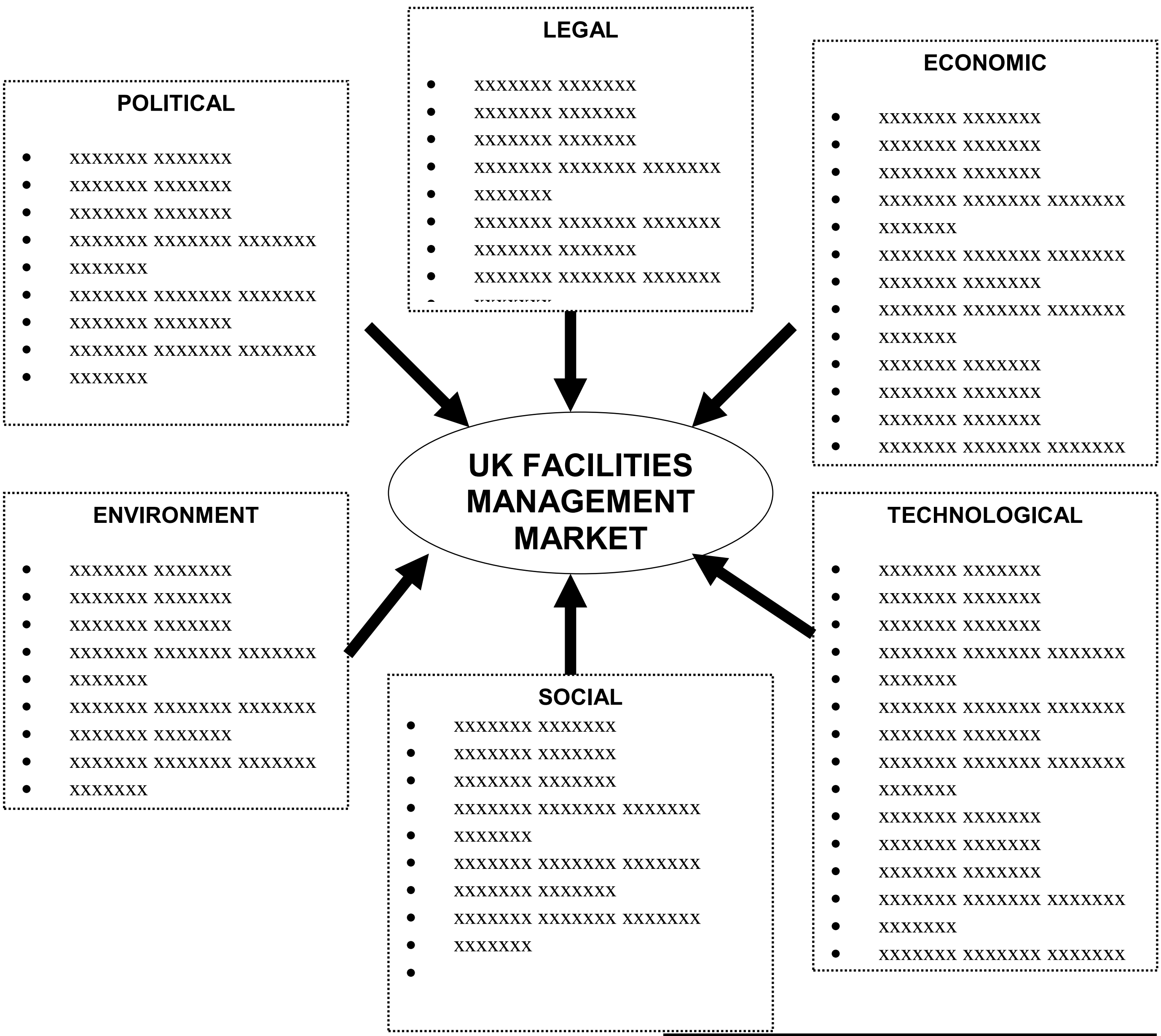
FM companies typically operate on xxxxxxx xxxxxxx xxxxxxx, with xxxxxxx xxxxxxx xxxxxxx xxxxxxx. Sources indicate that between 2008 and 2011, clients of FM providers

2.4 KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

2.4.1 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 Facilities Management 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 Facilities Management Market in 2012



Source: MTW Research Strategic Review 2012

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.

2.4.4SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

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

Figure 18: Key Strengths & Weaknesses in the Facilities Management Market 2012- 2016

STRENGTHS	WEAKNESSES
• More than 90% of the industry has a	• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx
• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx	• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx
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Source: MTW Research Strategic Review 2012

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

Figure 19: Key Opportunites & Threats in the Facilities Management Market 2012-2016

OPPORTUNITIES	THREATS
• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx	• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx
• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx	• Sample xxxxxxxx sample xxxx sample xxxxxx sample xxxx sample xxxxxxx
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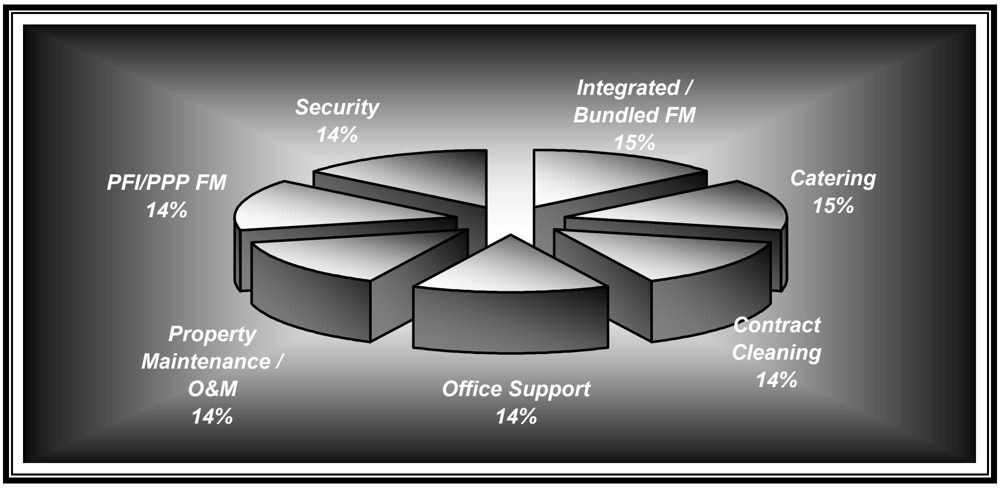
Source: MTW Research Strategic Review 2012

2.5 FACILITIES MANAGEMENT PRODUCT / SERVICE MIX

2.5.1 Share by Facilities Management Sector 2006, 2012 & 2016

The share accounted for by each of the key sectors within the UK Facilities Management market in 2012 is illustrated in the following chart:-

Figure 20: Share by Key Product Sector in Facilities Management Market 2012



Source: MTW Research / Trade Sources – figures changed in sample

As illustrated above, the UK facilities management market is comprised of a wide range of 'hard' and 'soft' FM services. In mid 2012 the xxxxx xxxxxxxxxxx xxxxxxxxx sector is estimated to account for the largest proportion of the market, with a share of around 32% by value. Sales in this sector are currently estimated at just under £xx billion in 2012, having increased by around 1% after xxxxx xxxxxxxxxxx xxxxxxxxx trading conditions in 2011 resulted in the sector xxxxx xxxxxxxxxxx xxxxxxxxx just over 2.5% by value. Indications are that this sector has continued to xxxxxxxxxx somewhat in recent years as expenditure on RMI (repair, maintenance & improvement) has contracted in the last three years as a result of the recession in 2009 and subsequent double dip recession in 2012.

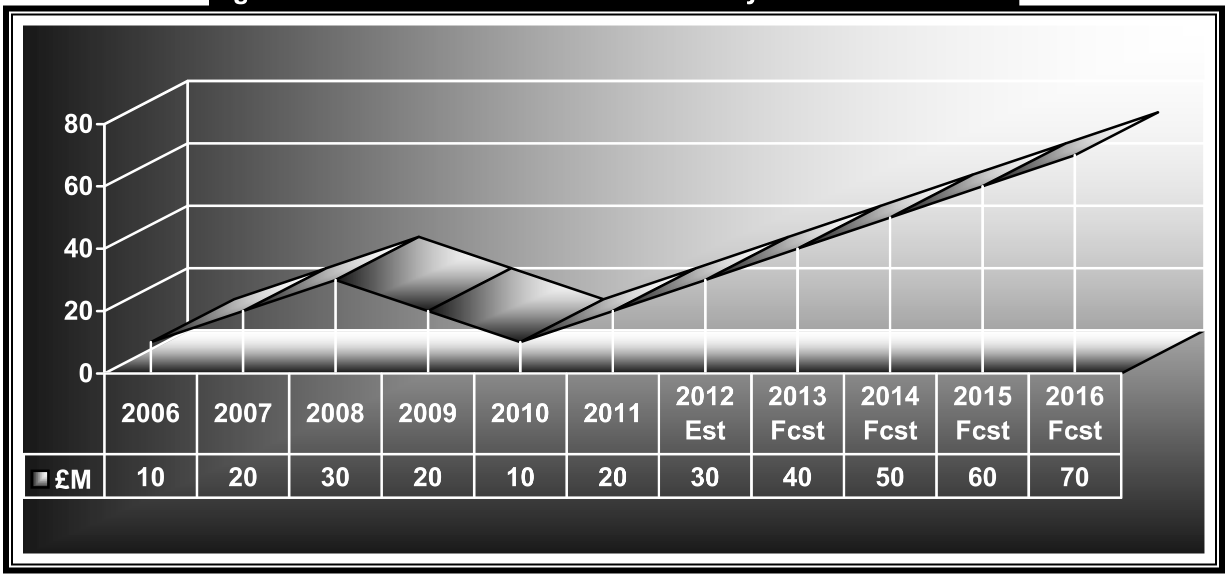
The second largest sector in the UK facilities management market is estimated to be accounted for by the xxxxxxxxxx xxxxxxxxxx FM services sector, with sales in this sector accounting for around 22% of the UK FM industry in 2012. The xxxxxxxxxx xxxxxxxxxx sector has historically outperformed the overall FM market in recent years, and this continued to be the case in 2011 and 2012. Sales in this sector are estimated to reach just under £xx billion to year end December 2012, reflecting a forecast increase of x%.

The 'soft' FM office support sector is also significant to the UK facilities management industry with sales in this market currently

2.5.2 Integrated FM / TFM Services Market Value 2006-2016

The following chart illustrates the performance of the 'bundled' FM sector of the Facilities Management market by value since 2006 and forecasts to 2016:-

Figure 23: 'Bundled' FM Services Market by Value 2006-2016 £M



Source: MTW Research / Trade Estimates

The 'bundled' FM services market comprises a wide range of services and is also referred to as Total Facilities Management or 'TFM'. The main principle of companies operating in this sector is based on xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx for clients than single service providers. More recently, TFM providers have also sought to xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx for clients through the provision of xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx.

To year end December 2012, bundled FM service provision is forecast to be worth just under £

2.6 FACILITIES MANAGEMENT END USER / CHANNEL MIX

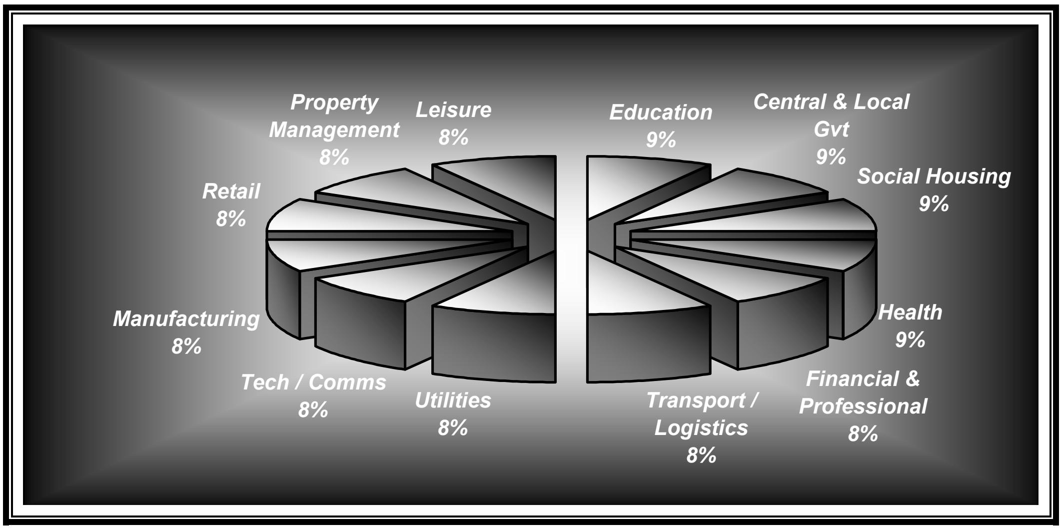
The following section identifies the key end use target markets for the UK Facilities Management industry and provides an illustration of historical market share in 2006, current share for 2012 and provides a forecast share for 2016.

2.6.1Share by Key End Use Market 2006, 2012 & 2016

The Facilities Management market comprises of a wide range of end use markets, each with varying levels of demand and key market influences within.

The following table illustrates our estimates of the current share accounted for by these sectors in 2012 by value:-

Figure 32: Share by Key End Use Sector in Facilities Management Market 2012



Source: MTW Research / Trade Sources - Figures Changed in Sample

As the above chart illustrates, the xxxxxxxxxx sector currently represents the largest key client group for FM companies in 2012, with 14% share, closely followed by the xxxxxxxxxx and xxxxxxxxxx sectors. These key end use markets combined account for around 40% of the total FM market have been boosted in recent years by the ongoing support of xxxxxxxxxx xxxxxxxxxx activity and in particular the xxxxxxxxxx xxxxxxxxxx.

Spending on xxxxxxxxxx by xxxxxxxxxx and xxxxxxxxxx xxxxxxxxxx is also a key customer group for the industry, along with xxxxxxxxxx each accounting for 8% market share in 2012, though the former is indicated to have lost some ground in recent years as xxxxxxxxxx xxxxxxxxxx impact the sector and some organisations have xxxxxxxxxx xxxxxxxxxx having been xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx through outsourcing.

Within the xxxxxxxxxx sector, the largest client groups fall within the xxxxxxxxxx xxxxxxxxxx, xxxxxxxxxx xxxxxxxxxx and xxxxxxxxxx sectors which account for xxxxxxxxxx xxxxxxxxxx x%. Indications are that following the rapid

In order to provide an historical comparison, the following chart illustrates the key sectors' estimated share of the Facilities Management market in 2006:-

Figure 33: Historical Share by Key End Use Sector in Facilities Management Market 2006

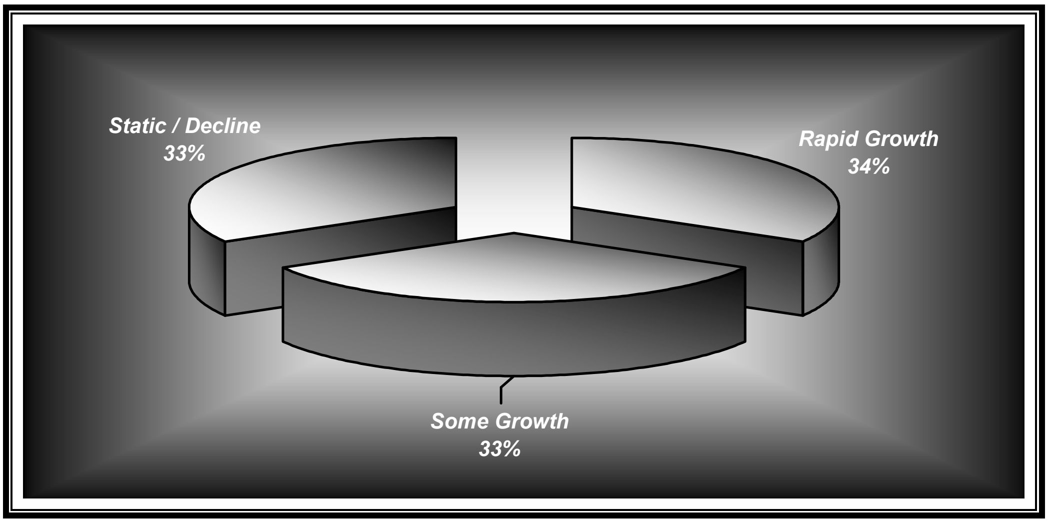
3. THE FACILITIES MANAGEMENT INDUSTRY

3.1 Facilities Management Industry Structure in 2012

3.1.1 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 35: Market Share by Facilities Management Contractor Sales Growth / Decline 2012



Source: MTW Research / Company Accounts – Figures Changed in Sample

In comparison to our report published in 2011 on this sector, the FM industry in general has experienced a xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx terms of performance, with a lower number of companies reporting xxxxxxxxxx than was the case 12 months ago. For the preceding 12 months to May 2012, our estimates suggest that around 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 Facilities Management market is estimated to have experienced some sales growth over the last 12 months.

4. FACILITIES MANGEMENT COMPANY RANKINGS

4.1Facilities Management Companies Listing

The following companies are ranked by estimated turnover and other financials providing an overview of the key organisations active in the market at present:-

Figure 42: Facilities Management Company Listing

Accuro FM Ltd
Acme Facilities Management (Manchester) Ltd.
Active Facilities Management Ltd.
Amec Group Ltd
Amey UK Plc
Andron Contract Services Ltd
Aramark Ltd
Arneil Johnston Ltd
ASM Facilities Ltd.
AWG Group Ltd
Axcess Solutions Ltd
Babcock International Group Plc
Balfour Beatty Workplace Ltd
BAM Construct UK Ltd
BBM Contracts Ltd
Best Fit Business Solutions Ltd
Capita Plc
Carillion (AM) Ltd
Carisway Facilities Management Ltd
Chaldean LLP
Chartwell Facilities Management Ltd
Clarke Chapman Facilities Management Ltd
Clean Supreme Ltd
CMS Group Ltd
Compass Group Plc
Courier Facilities Ltd
Cross Services Engineering Ltd
Dalkia Plc
Dove Services Ltd
Ecovert Group Ltd
Emcor Group (UK) Plc
Enterprise Plc
Enviro-Waste Ltd
Europa Support Services Ltd
Faceo FM UK Ltd
FES FM Ltd
First Services Facilities Management
Forward Facilities LLP
G & S Facilities Management Ltd.
G4S Plc
Gardiner & Theobald LLP
Gentoo Sunderland Ltd
GSH Group Plc
Guardian Consultancy Services Ltd
GVA Acuity Ltd
Haven Engineering Services Ltd
Haywards 2008 Ltd
Henry Boot Plc
Hillyard Associates Ltd
Hochtief Facility Management UK Ltd
Hs Facilities Management Ltd
Ice White Ltd
Inhouse Corporate Services Ltd
Interactive Facilities Management Ltd
Interserve Plc
Inviron Ltd
ISS Facility Services Ltd
J J & B Projects Ltd
J P B Property Holdings Ltd
Johnson Controls Ltd
Jones Lang Lasalle Ltd
Kier Group Plc
Laing O'Rourke Plc
Level Facilities Management Ltd
Maclellan International Ltd
Matthew Watts Associates Ltd
Miller Construction (UK) Ltd
Mitie Facilities Services Ltd
Morrison Plc
Muller Professional Services Ltd
Network Resource Ltd
NG Bailey Group Ltd
Noonan Services Group (NI) Ltd
OCS Group UK Ltd
Peter Howell Facilities Ltd
Phosters FS Ltd
Plan B Solutions Ltd
Promanex Group Holdings Ltd
PS Facilities Management Ltd
QFSL Cleaning UK Ltd
Quadron Services Ltd
Quality Assured Facility Services Ltd
Reliable Maintenance Ltd
Reliance Facilities Management Ltd
Rentokil Initial Plc
Risk Facility Management Ltd
Robertson Facilities Management Ltd
Rollright Facilities Ltd
Romec Ltd
Safetynet Solutions Ltd
Serco Group Plc
Service Works Group Ltd
Skanska Rashleigh Weatherfoil Ltd
Sodexo Holdings Ltd
Spencer Cox & Partners Ltd
Staveley Industries Public Ltd Company
Taylor Ridgway International Ltd
Thomson FM Ltd
Thyssenkrupp Services UK Ltd
Turner Estate Solutions Ltd
Tynewater Property Management Ltd
Veolia Environmental Services (UK)
VFM Consultancy Ltd
Vinci Plc
Vogue Facilities Management Ltd
Watson Lennard & Payne Ltd
Williams Facilities Management Ltd
WS Atkins Plc
WSP UK Ltd

Source: MTW Research / Trade Sources

The following section ranks the companies identified 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 Facilities Management Contractors Ranking By Turnover

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

Figure 43: Facilities Management Companies Ranked By Turnover 2012

1	xxxxxxxxxxx xxxxxxxx Ltd
2	xxxxxxxxxxx xxxxxxx

Source: MTW Research / Trade Sources

4.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2011:-

Figure 44: FM Companies Sales Estimates 2011

Trading Name	2011 Turnover £M	Trading Name	2011 Turnover £M
	£xxx		£111
	£xxx		£110
	£xxx		£80.0
	£xxx		£60.0
	£xxx		£45.0
	£xxx		£45.0
	£xxx		£35.0
	£xxx		£34.3
	£xxx		£30.5
	£xxx		£30.0
	£xxx		£22.0
	£xxx		£22.0
	£xxx		£19.0
	£xxx		£15.0
	£950		£15.0
	£890		£13.3
	£720		£13.1
	£645		£9.0
	£530		£6.0
	£495		£5.9
	£420		£4.3
	£405		£3.9
	£360		£3.6
	£300		£3.3
	£300		£3.1
	£275		£2.8
	£270		£2.7
	£250		£2.7
	£240		£2.6
	£200		£2.5
	£170		£2.5
	£160		£2.4
	£150		£2.1
	£147		£2.0
	£140		£1.9
	£136		£1.7
	£135		£1.4
	£125		£1.2

4.3 FM Companies Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the FM providers in 2011:-

Figure 45: Facilities Management Companies Ranked By Profit 2011

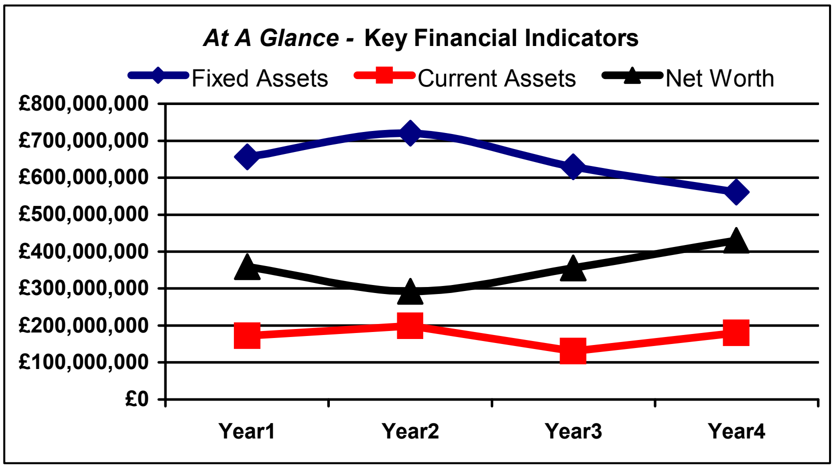
The following chapter illustrates the key financial indicators for the selected companies active in the UK FM industry, along with an 'at a glance' chart, illustrating the recent performance of each company. Turnover and profit estimates are also provided for each company alongside a brief description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

5. FM CONTRACTOR PROFILES & *'AT A GLANCE"*

The following chapter illustrates the key financial indicators for the selected companies active in the UK FM 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 Group Ltd - Company Overview & *'At a Glance'*

Sample Address
Sample Road
Sample Town
Sample Postcode
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on 09 December 2002. The company's main activities are recorded by Companies House as "To harness in-house design capabilities, project management and construction skills to establish long-term relationships and to provide services to the facilities management and electrical services." In 2012, the company has an estimated 4900 employees.

To year end December 2011, Sample Ltd is estimated to have achieved a turnover of around £720 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 Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	To harness in-house design capabilities, project management, and construction skills
Parent Company	Sample P L C
Ultimate Holding Company	Sample P L C
Estimated Number of Employees	4900
Senior Decision Maker / Director	John Sample

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

Sample Ltd - 4 Year KPIs to Year End 31-Dec-10

Key Indicator £	Year End 31-Dec-07 (Year1)	Year End 31-Dec-08 (Year2)	Year End 31-Dec-09 (Year3)	Year End 31-Dec-10 (Year4)
Fixed Assets	£656,413,000	£720,841,000	£629,999,000	£561,066,000
Current Assets	£171,726,000	£198,717,000	£130,413,000	£179,859,000
Current Liabilities	£223,297,000	£230,246,000	£169,929,000	£147,703,000
Long Term Liabilities	£229,872,000	£382,348,000	£221,396,000	£149,556,000
Net Worth	£358,659,000	£291,900,000	£355,080,000	£430,716,000
Working Capital	-£51,571,000	-£31,529,000	-£39,516,000	£32,156,000
Profit per Employee	£20,532	£1,739	£4,702	£12,474
Sales per Employee	£136,770	£144,256	£145,600	£146,691

END OF REPORT SAMPLE