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Contract Cleaning Market
Research & Analysis
UK 2016

Sample

N.B – Figures in charts have been changed & data redacted for this sample

Contract Cleaning Market Size & Review 2010-2016; SWOT & PEST Analysis, Mix by Service Type 2010-2020; End User Mix 2010-2020; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Trend Forecasts to 2020

6th Edition

April 2016

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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 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; 3 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 2010-2020** – Value of the market since 2010 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 2020. 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 2020 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 2010 –2020 –** Industry totals and averages since 2010 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 2020.

- **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 3 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.

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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 2010-2020 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 2010, 2016 & forecasts to 2020 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 2016.

Methodology & Report Sources

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 5th edition report included quantitative analysis of financial sales data from 70+ contract cleaners with a combined turnover of more than £4 billion in 2016. The research is unique in that it provides the reader with a 2016 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.

Executive Summary

To year end December 2016 sales of contract cleaning services will be worth some £xx billion, reflecting an xxxx xxxxxx of x% since 2016. The sector has exhibited more xxxxxx xxxxxx in recent years, estimated to have xxxxxx xxxxxx by just over x% since the 2010 value of £x billion. In 2016, xxxxxx xxxxxx across much of the UK xxxxxx continues to xxxxxx xxxxxx sales, though xxxxxx xxxxxx sector xxxxxx continues to lag xxxxxx xxxxxx xxxxxx sector. However, rising xxxxxx xxxxxx, sustained xxxxxx xxxxxx expenditure on xxxxxx xxxxxx xxxxxx coupled with xxxxxx xxxxxx xxxxxx xxxxxx should xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx for the market in the xxxxxx term. Margins have experienced modest xxxxxx since 2016 though xxxxxx xxxxxx pressures due to xxxxxx xxxxxx xxxxxx continue to xxxxxx xxxxxx xxxxxx in this regard. Nevertheless, xxxxxx xxxxxx xxxxxx prices and xxxxxx xxxxxx xxxxxx has xxxxxx xxxxxx an uplift in xxxxxx in more recent months.

xxxxxx xxxxxx services dominate the market in 2016 with this sector worth around £x billion, reflecting a share of x% of the total market. The second largest sector is accounted for by xxxxxx xxxxxx cleaning services, with this estimated to be worth some £x billion in 2016. The xxxxxx xxxxxx cleaning sector has experienced xxxxxx xxxxxx xxxxxx in recent years and exhibited an in xxxxxx crease of some x% xxxxxx the 2016 value.

The xxxxxx xxxxxx end use sector accounts for the largest proportion of the contract cleaning market in 2016 with around x%, closely followed by xxxxxx which is estimated to account for around x%. xxxxxx and xxxxxx sectors are also of significance with x% and 13% respectively. Boosted in part by xxxxxx, xxxxxx is estimated to account for around 12%, with xxxxxx xxxxxx accounting for 6% of the overall market having lost share in recent years. xxxxxx is currently estimated to account for around x% of the market.

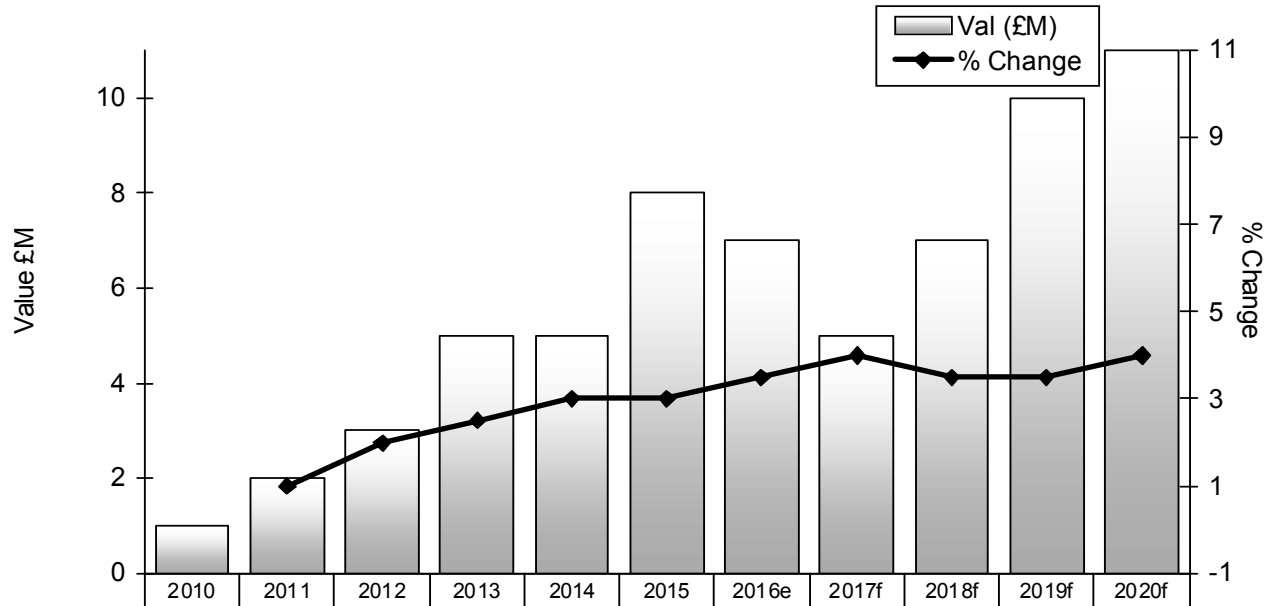
In terms of future prospects, ongoing xxxxxx xxxxxx is set to continue to characterise the market, with xxxxxx xxxxxx xxxxxx xxxxxx contract cleaning companies in order to xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx. Nevertheless, the market will remain xxxxxx xxxxxx xxxxxx with an increasing number of xxxxxx xxxxxx in the near term. Whilst business xxxxxx xxxxxx xxxxxx will remain high and xxxxxx xxxxxx remains a key problem for the market, sources suggest that there will be some xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx in the medium term.

2. 2 CONTRACT CLEANING MARKET SIZE & TRENDS 2010-2020

2.2.1 Contract Cleaning Market Size 2010-2020 – Current Prices

The performance of the UK contract cleaning market since 2010 is illustrated in the following chart with forecasts to 2020:-

Figure 1: Contract Cleaning Market – UK 2010 – 2020 By Value £m MSP (figures changed in sample)



	2010	2011	2012	2013	2014	2015	2016e	2017f	2018f	2019f	2020f
Val (£M)	1	2	3	5	5	8	7	5	7	10	11
% Change		1	2	2.5	3	3	3.5	4	3.5	3.5	4

Source: MTW Research / Trade Estimates - figures changed for sample purposes

The UK contract cleaning market is valued at just under £x billion at current prices in 2016, with the sector having experienced xxxxxx from mid xxxxxx xxxxxx as the UK xxxxxx have continued to xxxxxx xxxxxx.

The 'xxxxxxxx nature of the contract cleaning market often provides a degree of xxxxxx to exposure from xxxxxx xxxxxx and this also prevented any xxxxxx xxxxxx xxxxxx in the market between xxxxxx and xxxxxx. However, this market characteristic also means that the sector is also generally highly susceptible to xxxxxx xxxxxx and xxxxxx, with customer xxxxxx coming under increasing xxxxxx as a result during this period.

As illustrated above, the market experienced relatively xxxxxx performance between xxxxxx, with sales growth troughing in xxxxxx at just 0.2% - reflecting the xxxxxx xxxxxx in the market in recent years. Conditions xxxxxx relatively xxxxxx in H2 2016, before more xxxxxx xxxxxx through to the market in the second half of the year. To year end December 2016, sales xxxxxx xxxxxx xxxxxx % with much of this xxxxxx weighted toward the back end of the year.

xxxxxx xxxxxx xxxxxx xxxxxx across a wide xxxxxx of xxxxxx xxxxxx xxxxxx in the UK xxxxxx continued to xxxxxx xxxxxx volume xxxxxx in 2016, with some

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sources suggesting that contract xxxxxx xxxxxx also provided further stimulus. To year end December 2016, contract cleaning sales xxxxxx xxxxxx xxxxxx %, reflecting an xxxxxx xxxxxx xxxxxx industry xxxxxx by xxxxxx xxxxxx xxxxxx xxxxxx from a xxxxxx xxxxxx xxxxxx sectors.

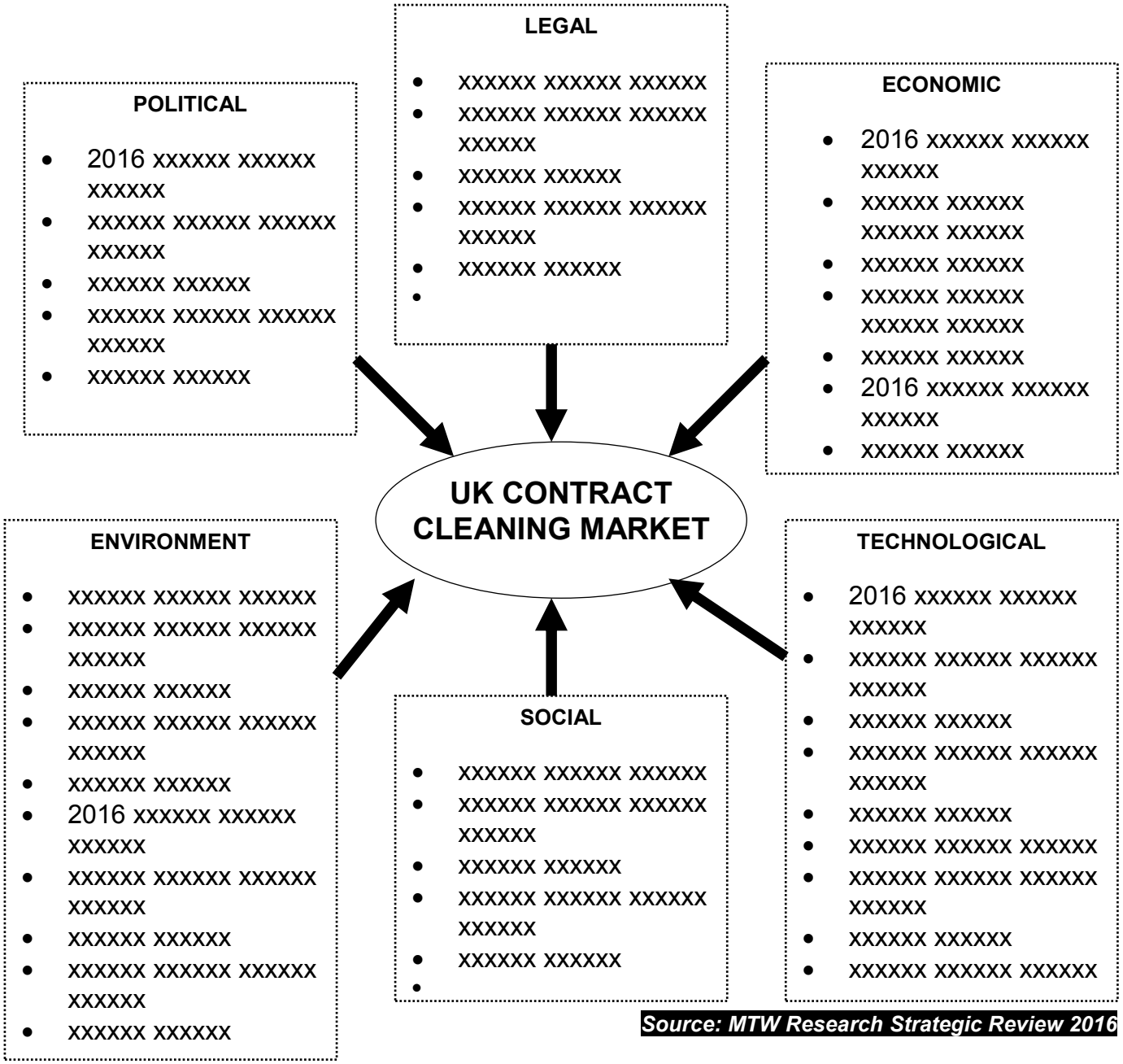
This xxxxxx xxxxxx xxxxxx xxxxxx continued into 2016, with xxxxxx xxxxxx xxxxxx and xxxxxx xxxxxx providing xxxxxx rates of xxxxxx in the market. Whilst there has been a lack of xxxxxx xxxxxx xxxxxx sector, sources indicate that sustained xxxxxx xxxxxx xxxxxx xxxxxx has continued to offer some

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 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 2016



Source: MTW Research Strategic Review 2016

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.

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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 2016-2020

STRENGTHS	WEAKNESSES
• Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample	• Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample

Source: MTW Research Strategic Review 2016

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

Figure 19: Key Opportunities & Threats in the Contract Cleaning Market 2016-2020

OPPORTUNITIES	THREATS
• Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample	• Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample Lorem Dipsum Sample Comment Censored From Sample • Lorem Dipsum Sample Comment Censored From Sample

Source: MTW Research Strategic Review 2016

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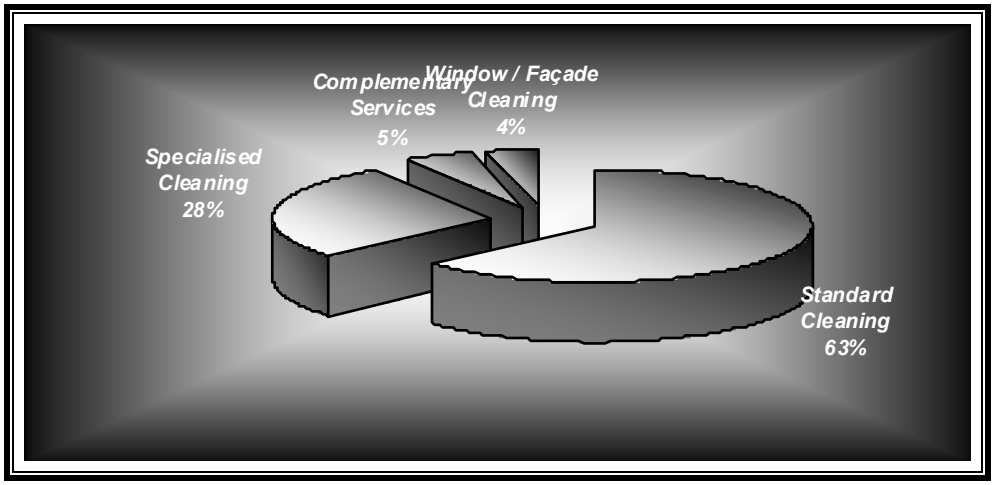
2. 5 CONTRACT CLEANING PRODUCT / SERVICE MIX

2.5.1 Share by Contract Cleaning Sector 2010, 2016 & 2020

The share accounted for by each of the key sectors within the UK contract cleaning market in 2016 is illustrated in the following chart:-

Figure 20: Share by Key Product Sector in Contract Cleaning Market 2016



Source: MTW Research / Trade Sources

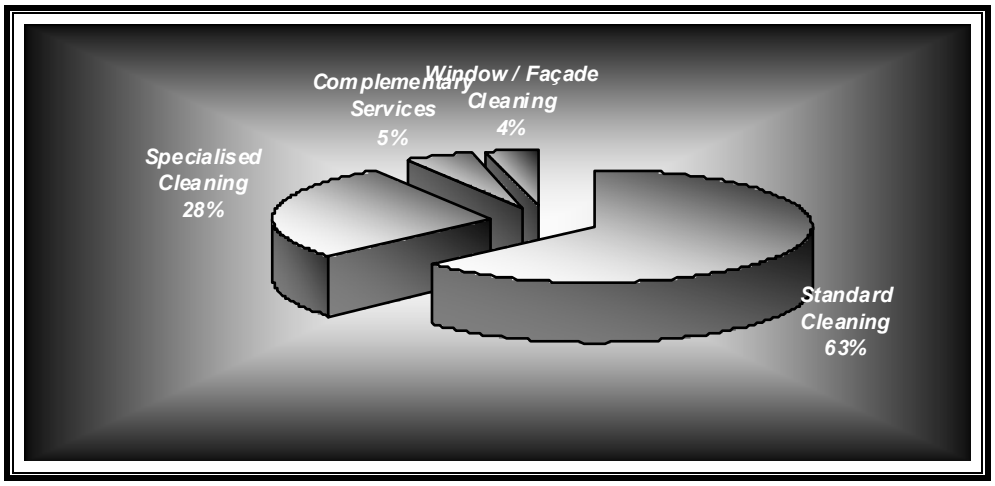
Shares Have Been Changed in Sample

As the above chart illustrates, 'xxxxxxx' cleaning services dominate the market in 2016 with this sector worth around £x billion, reflecting a share of x% of the total market.

The second largest sector at present is accounted for by xxxxx xx xxxxxx services, with this sector estimated to be worth some £xx billion in 2016. Given the changing nature of xxxxx xx xxxxxx toward more xxxxx xx xxxxxx xxxxx xx xxxxxx coupled with xxxxx xx xxxxxx xxxxx xx xxxxxx development, rising xxxxx xx xxxxxx xxxxx xx xxxxxx emphasis on xxxxx xx xxxxxx xxxxx xx xxxxxx and xxxxx xx xxxxxx, this sector is likely to gain share in the medium to longer term as contractors seek to xxxxx xx xxxxxx xxxxx xx xxxxxx within a more xxxxx xx xxxxxx market.

The following chart illustrates the historical mix by value for each of the key sectors in 2010:-

Figure 21: Historical Share by Key Sector in Contract Cleaning Market 2010



Source: MTW Research / Trade Sources

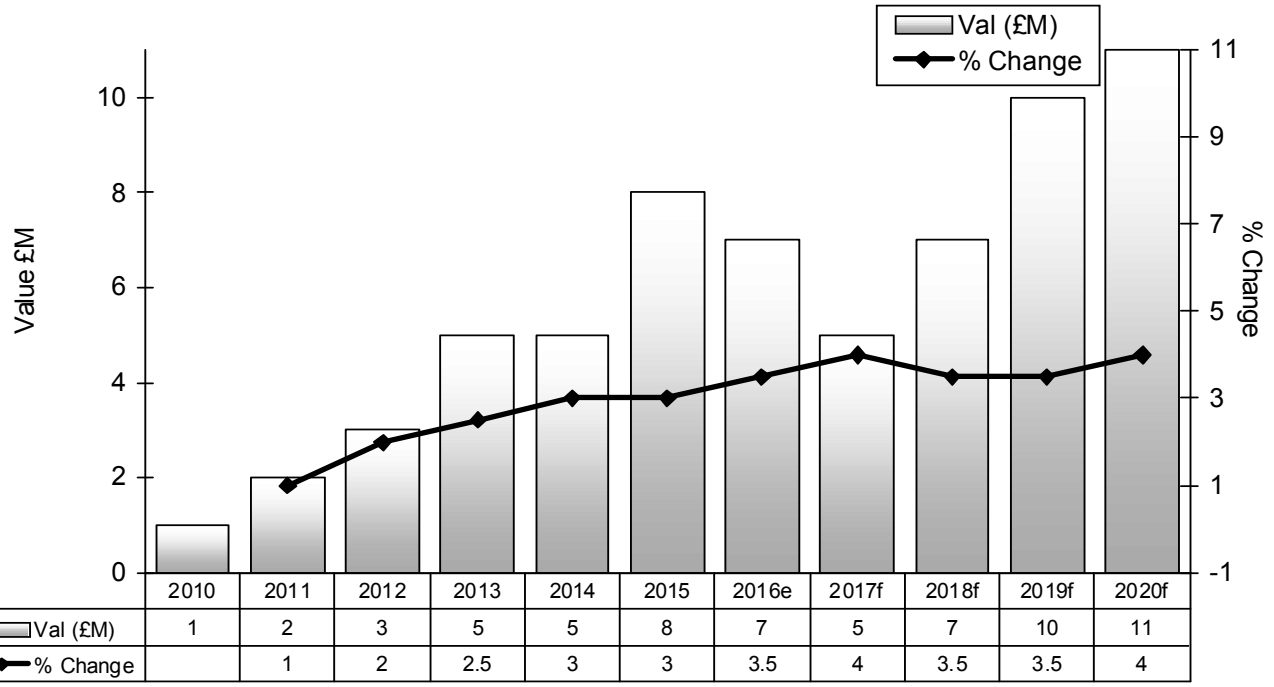
Shares Have Been Changed in Sample

As illustrated in the above chart,

2.5.2 Standard Contract Cleaning Market 2010-2020

The following chart illustrates the performance of the 'standard cleaning' sector of the contract cleaning market by value since 2010 and forecasts to 2020:-

Figure 23: UK Standard Contract Cleaning Market by Value 2010-2020 £M



	2010	2011	2012	2013	2014	2015	2016e	2017f	2018f	2019f	2020f
Val (£M)	1	2	3	5	5	8	7	5	7	10	11
% Change		1	2	2.5	3	3	3.5	4	3.5	3.5	4

Source: MTW Research / Trade Estimates

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In 2016, sales of 'standard cleaning' services are currently estimated to be worth some £xx billion, reflecting a xxxxx xx xxxxxx xxxxx xx xxxxxx of trading in the last couple of years in value terms. Sources indicate that whilst the market xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx in value in recent years, xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx evident across a number of key end use sectors, offering xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx value performance in the next few years.

However, despite a likely xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx in the near term, xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx remains a key characteristic of this sector of the market which continues to xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx sales growth.

As illustrated in the above chart, since 2010 sales of 'standard' cleaning have xxxxx xx xxxxxx xxxxx xx xxxxxx from a value of just over £x billion to current levels of £xx billion in 2016, reflecting a xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx of 8% in the last 6 years.

Trade sources indicate that demand from xxxxx xx xxxxxx have been xxxxx xx xxxxxx xxxxx xx xxxxxx in recent years, with these companies increasingly bringing xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx, in order to xxxxx xx xxxxxx. This trend is indicated to be slowing in 2016 as xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx slowly, though remains a key characteristic of the sector. Nevertheless, the 'xxxxx xx xxxxxx of these services also often means that xxxxx xx xxxxxx xxxxx xx xxxxxx – particularly in larger organisations and companies. As a result, xxxxx xx xxxxxx xxxxx xx xxxxxx in the xxxxx xx xxxxxx xxxxx xx xxxxxx is indicated to have remained reasonably xxxxx xx xxxxxx in the last few years.

Despite ongoing efforts by the industry to encourage xxxxx xx xxxxxx and xxxxx xx xxxxxx xxxxx xx xxxxxx cleaning services, the majority of the sector remains in the 'xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx the market. This has sustained a xxxxx xx xxxxxx xxxxx xx xxxxxx from clients in recent years, resulting in the sector having xxxxx xx xxxxxx xxxxx xx xxxxxx

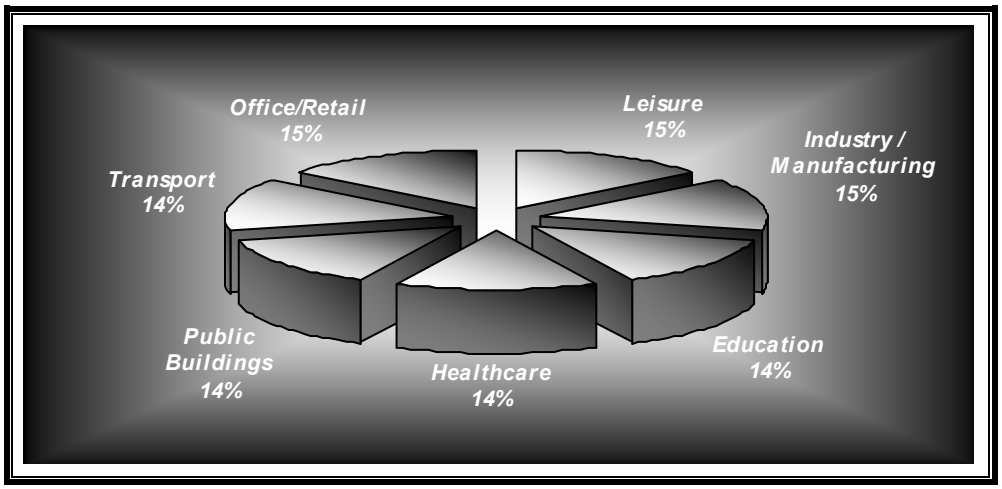
2. 6 CONTRACT CLEANING END USER / CHANNEL MIX

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 2010, current share in 2016 and provides a forecast share for 2020.

2. 6. 1Share by Key End Use Market 2010, 2016 & 2020

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 2016 by value:-

Figure 26: Share by Key End Use Sector in Contract Cleaning Market 2016



Source: MTW Research / Trade Sources

Shares Have Been Changed in Sample

NB: Shares may not sum 100% due to rounding

Due to the fact that there is a considerable xxxxx xx xxxxxx xxxxx xx xxxxxx xxxxx xx xxxxxx market share, as such the above figures xxxxx xx xxxxxx xxxxx xx xxxxxx

As the above chart illustrates, the xxxxx xx xxxxxx sector accounts for the largest proportion of the contract cleaning market in 2016 with around x%, closely followed by the xxxxx xx xxxxxx sector which is estimated to account for around x4%.

xxxxx xx xxxxxx xxxxx xx xxxxxx sectors are also of significance with 16% and x% respectively. xxxxx xx xxxxxx is estimated to account for around 12%, with xxxxx xx xxxxxx accounting for around 6% of the overall market.

The xxxxx xx xxxxxx sector has performed less well than some others in recent years and is currently estimated to account for around x% of the market by value.

In order to provide a historical comparison, the following chart illustrates the key sectors' estimated share of the contract cleaning market in 2010:-

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3. RANKINGS FOR CONTRACT CLEANERS IN 2016

3.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2016:-

Figure 38: Contract Cleaning Companies Sales Estimates 2016

Trading Name	2016 Turnover £M	Trading Name	2016 Turnover £M
Sample Company	£x.xxx	Sample Company	£x.xxx
Sample Company	£x.xxx	Sample Company	£x.xxx
Sample Company	£x.xxx	Sample Company	£x.xxx

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4.2 Contract Cleaners Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the contract cleaners in 2016:-

Figure 39: Contract Cleaning Companies Ranked By Profit 2016

1	Sample Company Ltd	41	Sample Company Ltd
2	Sample Company Ltd	42	Sample Company Ltd
3	Sample Company Ltd	43	Sample Company Ltd
4	Sample Company Ltd	44	Sample Company Ltd
5	Sample Company Ltd	45	Sample Company Ltd
6	Sample Company Ltd	46	Sample Company Ltd
7	Sample Company Ltd	47	Sample Company Ltd
8	Sample Company Ltd	48	Sample Company Ltd
9	Sample Company Ltd	49	Sample Company Ltd
10	Sample Company Ltd	50	Sample Company Ltd
11	Sample Company Ltd	51	Sample Company Ltd
12	Sample Company Ltd	52	Sample Company Ltd
13	Sample Company Ltd	53	Sample Company Ltd
14	Sample Company Ltd	54	Sample Company Ltd
15	Sample Company Ltd	55	Sample Company Ltd
16	Sample Company Ltd	56	Sample Company Ltd
17	Sample Company Ltd	57	Sample Company Ltd
18	Sample Company Ltd	58	Sample Company Ltd
19	Sample Company Ltd	59	Sample Company Ltd
20	Sample Company Ltd	60	Sample Company Ltd
21	Sample Company Ltd	61	Sample Company Ltd
22	Sample Company Ltd	62	Sample Company Ltd
23	Sample Company Ltd	63	Sample Company Ltd
24	Sample Company Ltd	64	Sample Company Ltd
25	Sample Company Ltd	65	Sample Company Ltd
26	Sample Company Ltd	66	Sample Company Ltd
27	Sample Company Ltd	67	Sample Company Ltd
28	Sample Company Ltd	68	Sample Company Ltd
29	Sample Company Ltd	69	Sample Company Ltd
30	Sample Company Ltd	70	Sample Company Ltd
31	Sample Company Ltd	71	Sample Company Ltd
32	Sample Company Ltd	72	Sample Company Ltd
33	Sample Company Ltd	73	Sample Company Ltd
34	Sample Company Ltd	74	Sample Company Ltd
35	Sample Company Ltd	75	Sample Company Ltd
36	Sample Company Ltd	76	Sample Company Ltd
37	Sample Company Ltd	77	Sample Company Ltd
38	Sample Company Ltd		
39	Sample Company Ltd		
40	Sample Company Ltd		

Source: MTW Research / Company Accounts

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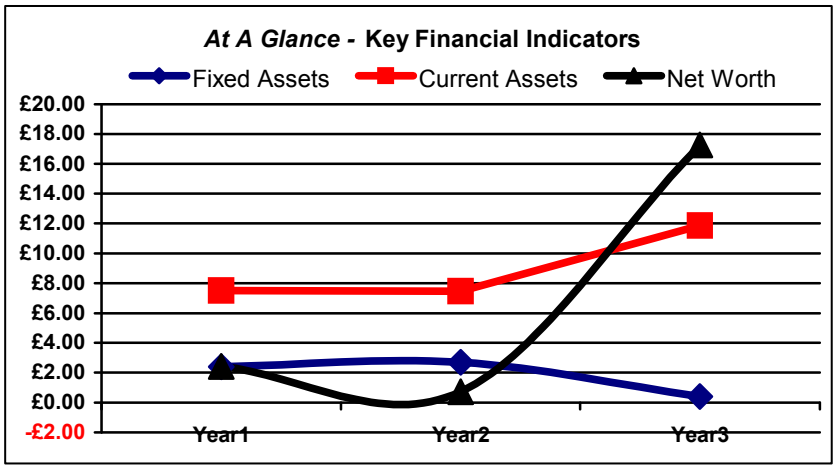
4. CONTRACT CLEANERS PROFILES & *'AT A GLANCE"*

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 Cleaning Services Limited - Company Overview & *'At a Glance'*

Address1
Address2
Address3
Address4
Postcode
Tel:

Sample Cleaning Services Limited is a private limited company, incorporated on 19th February 1987. The company's main activities are recorded by Companies House as "Contract Cleaning Services." In 2016, the company has an estimated 1,300 employees.

To year end December 2016, Sample Cleaning Services Limited is estimated to have achieved a turnover of around £13.0 million. Pre-tax profit for the same period is estimated at around £1.5 million. The following table briefly provides a top line overview on Sample Cleaning Services Limited:-

Company Name	Sample Cleaning Services Limited
Brief Description of Activities	Contract Cleaning Services.
Parent Company	Sample
Ultimate Holding Company	
Estimated Number of Employees	1,300
Senior Decision Maker / Director	Sample Sample

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

Sample Cleaning Services Limited - 3 Year Financials to Year End 31-Aug-14

Key Indicator £M	Year End 31-Aug-12 (Year1) £M	Year End 31-Aug-13 (Year2) £M	Year End 31-Aug-14 (Year3) £M
Fixed Assets	£0.26	£0.3	£0.25
Current Assets	£4.42	£4.75	£6.03
Current Liabilities	£1.52	£1.47	£1.77
Long Term Liabilities	-	-	-
Net Worth	£3.16	£3.57	£4.48
Working Capital	£2.9	£3.28	£4.25
Profit per Employee	£0.001	£0.001	£0.001
Sales per Employee	£0.009	£0.009	£0.01