



Contract Cleaning Market
Research & Analysis
UK 2022

REPORT SAMPLE

Contract Cleaning Market Size & Review 2016-2022; SWOT & PEST Analysis, Mix by Service Type 2016-2026; End User Mix 2016-2026; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Trend Forecasts to 2026

8th Edition

November 2022

Research & Analysis Report Contents

1.	INTRODUCTION TO RESEARCH & ANALYSIS REPORTS.....	5
1.1	Key Features & Benefits of this <i>Research & Analysis</i> Report	5
1.2	Introduction to this <i>Research & Analysis</i> Report	6
2.	UK CONTRACT CLEANING MARKET.....	7
2.1	MARKET DEFINITION & EXECUTIVE SUMMARY & MARKET OVERVIEW	7
2.2	CONTRACT CLEANING MARKET SIZE & TRENDS 2016-2026	10
2.2.1	Contract Cleaning Market Size & Trends 2016-2026 – Current Prices	10
2.2.2	Market Size Trends & Macro Market Influences.....	10
2.2.3	Micro Market Trends, Strategies & Influences.....	12
2.2.4	Recent Market Mergers & Acquisitions.....	14
2.2.5	Contract Cleaning Market Size 2016-2026 – Constant Prices.....	16
2.2.6	Contract Cleaning Market – Positive Market Trends.....	17
2.2.7	Contract Cleaning Market – Negative Market Trends.....	18
2.2.8	Average Contract Cleaner Sales Revenue 2016-2026.....	21
2.2.9	Future Prospects.....	22
2.3	KEY MARKET TRENDS IN THE CONTRACT CLEANING MARKET.....	25
2.3.1	Contract Cleaning Industry Profitability 2016-2026	25
2.3.2	Contract Cleaning Industry Assets 2016-2026	27
2.3.3	Contract Cleaning Industry Debt 2016-2026	29
2.3.4	Contract Cleaning Market Net Worth 2016-2026	31
2.3.5	Sales Per Employee in Contract Cleaning Market 2016-2026	33
2.4	KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS.....	34
2.4.1	PEST ANALYSIS – Illustration of Key Market Forces.....	34
2.4.2	Political & Legal Influences & Trends.....	35
2.4.3	The Impact of Brexit on the Market 2022-2026	37
2.4.4	Impact of Covid 19 on the UK FM Market	38
2.4.5	Macro Economic Influences & Trends 2016-2026	39
	Gross Domestic Product 2016-2026	39
	UK Inflation 2016-2026	40
	Interest Rates 2016-2026	41
	UK Unemployment Rates 2016-2026.....	41
	Commercial Property Market 2016-2026	42
2.4.6	SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats.....	44
2.5	CONTRACT CLEANING PRODUCT / SERVICE MIX.....	46
2.5.1	Share by Contract Cleaning Sector 2016, 2022 & 2026	46
2.5.2	Standard Contract Cleaning Market 2016-2026	48
2.5.3	Specialised Contract Cleaning Market 2016-2026.....	52
2.5.4	Window / Facade Contract Cleaning Market 2016-2026	56
2.6	CONTRACT CLEANING END USER / CHANNEL MIX.....	59
2.6.1	Share by Key End Use Market 2016, 2022 & 2026	59
3.	THE CONTRACT CLEANING INDUSTRY	63
3.1	Contract Cleaning Industry Structure in 2022.....	63
3.1.1	Industry Mix by Growth/Decline Over Last 12 Months.....	63
3.1.2	Industry Share by Credit Rating in 2022	64
3.1.3	Industry Mix by Age of Companies in 2022	65
3.1.4	Industry Share by Number of Employees in 2022	66
3.1.5	Industry Mix by Turnover Band in 2022	67
3.1.6	Industry Share by Location Type in 2022.....	68
3.1.7	Industry Mix by Geographical Region in 2022	69
4.	RANKINGS FOR CONTRACT CLEANERS	70
4.1	Contract Cleaning Companies Listing.....	70
4.2	Contract Cleaners Ranking By Turnover.....	72
4.2	Individual Turnover Estimates by Company.....	73
4.3	Contract Cleaners Ranking by Profitability.....	74

Market Report Tables & Charts

Figure 1: Contract Cleaning Market – UK 2016 - 2026 By Value £m	10
Figure 2: Contract Cleaning Market – UK 2016 - 2026 in Constant Prices £m	16
Figure 3: Average Sales in the Contract Cleaning Market – UK 2016 – 2026 £M	21
Figure 4: Contract Cleaning Market Profitability – UK 2016 – 2026 £M	25
Figure 5: Contract Cleaning Market Average Profitability – UK 2016 – 2026 £M	26
Figure 6: Total Asset Performance – UK 2016 – 2026 £M	27
Figure 7: Average Asset Performance – UK 2016 – 2026 £M	28
Figure 8: Contract Cleaning Market Debt – UK 2016 – 2026 £M	29
Figure 9: Contract Cleaning Market Average Debt – UK 2016 – 2026 £M	30
Figure 10: Contract Cleaning Market Net Worth – UK 2016 – 2026 £M	31
Figure 11: Contract Cleaners Average Net Worth – UK 2026 – 2026 £M	32
Figure 12: Sales Per Employee – UK 2016 – 2026 £M	33
Figure 13: PEST Analysis for UK Contract Cleaning Market in 2022.....	34
Figure 13: UK Economic Annual Performance– GDP 2016-2026	39
Figure 14: UK Economic Annual Performance– Inflation (CPI) 2016-2026	40
Figure 15: UK Economic Annual Performance– Interest Rates (Bank of England) 2016-2026.....	41
Figure 16: UK Unemployment Numbers 2016-2026	42
Figure 17: UK Non-Domestic Property Transactions 2016-2026.....	43
Figure 18: Key Strengths & Weaknesses in the Contract Cleaning Market 2022-2026	44
Figure 19: Key Opportunities & Threats in the Contract Cleaning Market	45
Figure 20: Share by Key Product Sector in Contract Cleaning Market 2022	46
Figure 21: Historical Share by Key Sector in Contract Cleaning Market 2016-2022	47
Figure 22: Forecast Share by Key Sector in Contract Cleaning Market 2022-2026	48
Figure 23: UK Standard Contract Cleaning Market by Value 2016-2026 £M	49
Figure 24: Specialised Contract Cleaning Market by Value 2016-2026 £M	52
Figure 25: Window / Facade Contract Cleaning Market by Value 2016-2026 £M	56
Figure 26: Share by Key End Use Sector in Contract Cleaning Market 2022	59
Figure 27: Historical Share by Key End Use Sector in Contract Cleaning Market 2016.....	60
Figure 28: Share by Key End Use Sector 2016, 2022 & Forecasts to 2026	62
Figure 29: Market Share by Contract Cleaning Company Sales Growth / Decline 2022.....	63
Figure 30: Market Share by Credit Rating in the Contract Cleaning Industry 2022	64
Figure 31: Market Share by Company Age in the Contract Cleaning Market 2022	65
Figure 32: Mix by Number of Employees in the Contract Cleaning Market 2022.....	66
Figure 33: Share by Turnover Band in the Contract Cleaning Market 2022.....	67
Figure 34: Mix by Location Type in the Contract Cleaning Market 2022	68
Figure 35: Mix by Location Type in the Contract Cleaning Market 2022	69
Figure 36: Contract Cleaning Company Listing.....	70
Figure 37: Contract Cleaning Companies Ranked By Turnover 2022	72
Figure 38: Contract Cleaning Companies Sales Estimates & Ranking 2022	73
Figure 39: Contract Cleaning Companies Profit Estimates 2022 & Ranking	74

file:///c:/users/mtw
research/desktop/mtwresearch/research/
outsourcing/contract cleaning market
2022/report/contract cleaning market uk
2022_sample.docx
Click to follow link

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

Terms & Conditions of Use

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

Permitted Use, Limitations on Use

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

Limitation of Liability

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

Applicable Law

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

Intellectual Property Rights

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

Companies Included

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

Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW provide figures for turnover, profit before tax and other data 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 other data provided in this report in relation to individual companies should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

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

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, end user mix, key trends and influences and forecasts of market size for the next 4 years. In addition, rankings by turnover and profit for key companies are provided. Contact, telemarketing & mailing details are also available as a separate option from MTW.

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 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. MTW provide most recent turnover and profit estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Sales Leads Also Available**

MTW have longstanding experience in providing high quality sales leads and marketing lists. Whether you want to reach out by telephone, email or mail MTW can offer you a high quality list to grow sales.

- **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. 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 2016-2026** – Value of the market since 2016 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 2026. 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 2026 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 2016 –2026** – Industry totals and averages since 2016 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 2026.
- **Supplier Review** – This report provides financial intelligence of relevant and leading players in this market. Unique in that we provide a **turnover and profit** estimate for every company in the report for **full year 2022**, the report also ranks each company by turnover and profitability. The report provides 2022 turnover and profit estimates for every company, regardless of size, assisting the reader to 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 2016-2026 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 2016, 2022 & forecasts to 2026 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, 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 2022 considering the impact of inflation.

Methodology & Report Sources

We've been writing reports on this sector since 1999. 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 8th edition report included quantitative analysis of financial sales data from 90+ contract cleaners with a combined turnover of more than £3 billion in 2022.

This research is unique in that it provides the reader with a 2022 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 2022 sales of contract cleaning services will be worth some £xx billion, reflecting an xxxxxx of xx% since 2021. Following a xxxxx of xxxx% in 2020, the sector has exhibited xxxx xxxxx, and is now valued at around x% xxxx than the 2019 market vale of £xx billion.

The legacy impact of xxxx and sustained focus xxxx xxxx, ongoing xxxx xxxx xxxx and wider xxxx xxxx xxxx xxxx and challenges brought about by the xxxx xxxx in xxxx xxxx continue to present xxxx xxxx xxxx, as well as some xxxx xxxx for the market in late 2022.

The market is set to xxxx xxxx the overall UK economy in 2022 and 2023 as micro market influences continue to xxxx xxxx xxxx demand trends. Whilst the market continues to experience xxxx xxxx xxxx levels of xxxx xxxx xxxx xxxx for cleaning products, fuel and equipment; a slight xxxx xxxx xxxx in the last few years, coupled with a xxxx xxxx xxxx industry capacity has helped to xxxx xxxx xxxx xxxx.

Whilst the wider TFM (total facilities management) companies continue to xxxx xxxx the market in xxxx xxxx cleaning, more xxxx xxxx cleaning companies have xxxx their market position. xxxx xxxx market positions have generated more xxxx business strategies and protected xxxx by offering xxxx xxxx and more xxxx xxxx. For example, more xxxx xxxx providers have more quickly xxxx xxxx approach to xxxx cleaning in response to xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx.

The UK is currently xxxx xxxx xxxx in late 2022, with xxxx xxxx levels of volume demand from most sectors of the market increasingly evident. Forecasts for 2023 are for the market to xxxx xxxx xxxx GDP, though the sector is expected to xxxx xxxx xxxx of xxxx xxxx, resulting in an increasingly complex trading environment in 2023 and beyond. High levels of xxxx spending to support the UK economy in 2020 – 2023, financed by xxxx xxxx, is likely to translate into xxxx being xxxx in the public sector in the longer term, thereby xxxx xxxx contract cleaning demand in xxxx xxxx confidence xxxx xxxx xxxx.

xxxx cleaning services dominate the market in 2022 with this sector worth around £xx billion, reflecting a share of x% of the total market, though the sector is continuing to xxxx share year on year. The second largest sector is accounted for by more 'xxxx cleaning services, with this estimated to be worth some £x billion in 2021. The xxxx cleaning sector has outperformed the overall market in recent years and is likely to increase by around x% in 2022, continuing to gain share from the xxxx cleaning sector.

The xxxx sector accounts for the largest proportion of the contract cleaning market end user in 2022 with around x%, closely followed by xxxx which is estimated to account for just over x%. xxxx xxxx xxxx sectors are also of significance with x% and x% respectively. xxxx is currently estimated to account for around 5% of the market in 2022, reflecting sales of around £xm.

In terms of future prospects, mergers and acquisitions xxxx xxxx xxxx xxxx xxxx next few years, following somewhat of a xxxx xxxx xxxx xxxx xxxx xxxx xxxx. Within the lower value sector, xxxx xxxx xxxx xxxx xxxx are set to become increasingly important, particularly with xxxx xxxx xxxx xxxx xxxx likely to continue in the near term.

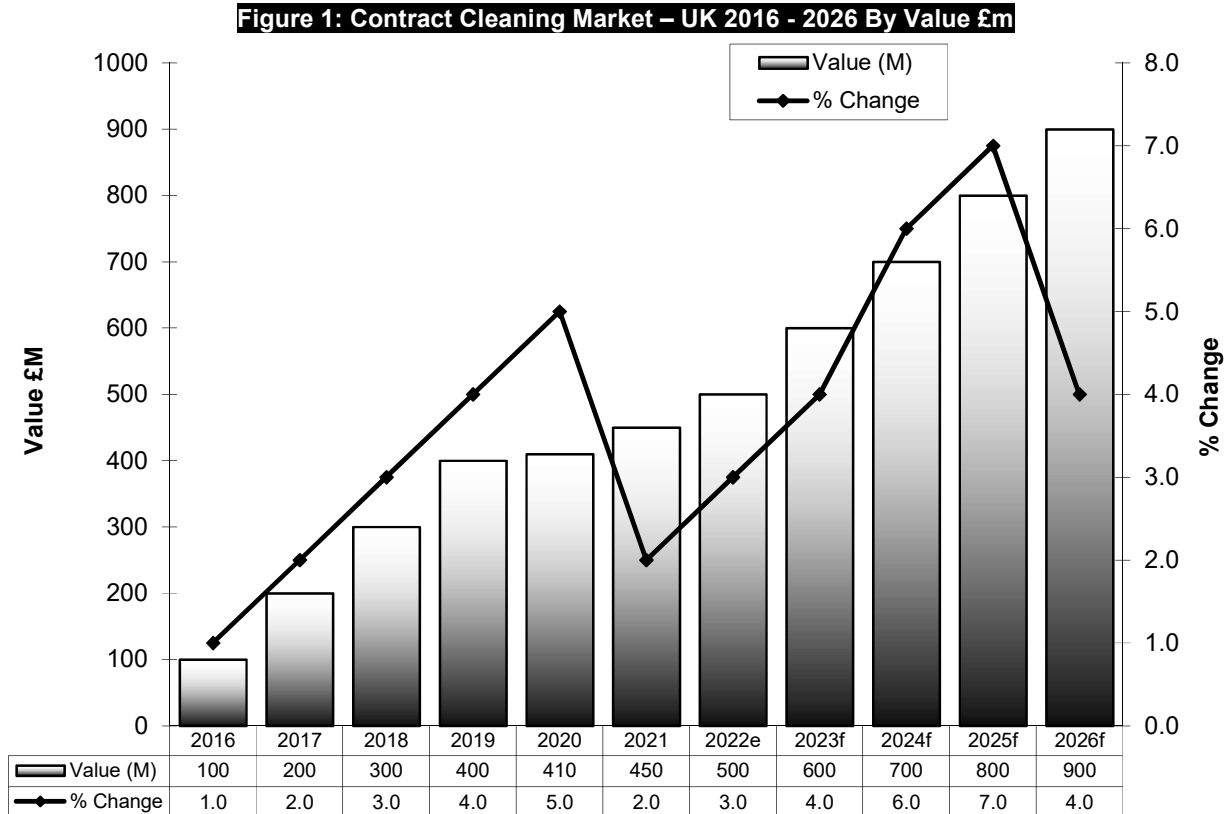
Whilst the market is set to experience a xxxx xxxx xxxx xxxx in 2023 due to xxxx xxxx xxxx and xxxx xxxx xxxx xxxx xxxx xxxx xxxx of business investment, expectations are for xxxx xxxx xxxx xxxx medium to longer term as the market is underpinned by xxxx xxxx xxxx xxxx xxxx growth drivers such as xxxx xxxx, xxxx xxxx xxxx, xxxx expectations, xxxx xxxx xxxx xxxx practices, xxxx and xxxx xxxx xxxx.

By December 2026 therefore, our forecasts are for the market to be worth some £x billion, reflecting xxx xxxx of some x% in the next 4 years.

2.2 CONTRACT CLEANING MARKET SIZE & TRENDS 2016-2026

2.2.1 Contract Cleaning Market Size & Trends 2016-2026 – Current Prices

The performance of the UK contract cleaning market since 2016 is illustrated in the following chart with forecasts to 2026:- (Figure changed for sample)



Figures in Chart changed for sample purposes; Source: MTW Research / Trade Estimates

Sales in the contract cleaning market are currently valued at £x billion in 2022, reflecting xxxx of some xx% in the last 6 years. Since 2016 the market has xxxxx in value by xx%.

2.2.2 Market Size Trends & Macro Market Influences

Between 2016 and 2019 the market xxxx by just under xxxx % before the impact of the xxxx xxxx xxxx xxxx resulted in a xxxx xxxx xxxx in overall market activity of around xxxx %. Whilst some areas of the contract cleaning market exhibited xxxx xxxx xxxx xxxx xxxx such as xxxx xxxx xxxx xxxx care and xxxx xxxx xxxx xxxx xxxx xxxx xxxx services, xxxx xxxx cleaning companies focused on the commercial sector xxxx xxxx, contributing to the xxxx xxxx xxxx xxxx xxxx xxxx.

Despite sustained