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Contract Cleaning Market
Research & Analysis UK 2009

Report Sample

Contract Cleaning Market Size & Review 2004-2009; SWOT & PEST Analysis, Mix by Service Type 2004-2013; End User Mix 2004-2013; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Trend Forecasts to 2013

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Premier Cleaning & Hygiene Services Ltd - 4 Year KPIs to Year End 31-Mar-07 207
Premier Contract Cleaning Ltd - 4 Year KPIs to Year End 31-Dec-08 208
Premier Contract Services (Bristol) Ltd - 4 Year KPIs to Year End 31-Aug-08 209
Prestige Cleaning Contractors - 4 Year KPIs to Year End 31-Mar-08 210
Progressive Cleaning Ltd - 4 Year KPIs to Year End 30-Apr-08 211
Prokleen UK Ltd - 4 Year KPIs to Year End 31-Jul-08 212
Purley Contract Cleaning Co Ltd - 4 Year KPIs to Year End 30-Jun-09 213
Regent Office Care Ltd - 4 Year KPIs to Year End 31-Dec-08 214
Region Clean - 4 Year KPIs to Year End 31-Dec-06 215
Rentokil Initial Plc - 4 Year KPIs to Year End 31-Dec-08 216
Resource (UK) Ltd - 4 Year KPIs to Year End 31-Mar-08 217
Response Services UK Ltd - 4 Year KPIs to Year End 31-Dec-07 218
Reynard Cleaning Ltd - 4 Year KPIs to Year End 31-Mar-09 219
RGS Cleaning Ltd - 4 Year KPIs to Year End 31-Mar-09 220
Riverside Contract Cleaning Services Ltd - 4 Year KPIs to Year End 31-Mar-08 221
Robinson Hygiene Services - 4 Year KPIs to Year End 31-Dec-08 222

SCB Services - 4 Year KPIs to Year End 31-Mar-08 223
Scot Kleen Ltd - 4 Year KPIs to Year End 30-Jun-08 224
Scotia Clean Teck Ltd - 4 Year KPIs to Year End 31-Mar-09 225
Servicemaster Ltd - 4 Year KPIs to Year End 31-Dec-07 226
Smart Cleanings UK Ltd - 4 Year KPIs to Year End 30-Sep-08 227
Sofisti-Clean Limited - 4 Year KPIs to Year End 30-Sep-08 228
Sparkle Cleaning Co - 4 Year KPIs to Year End 31-Mar-09 229
Spick & Span Ltd - 4 Year KPIs to Year End 31-May-08 230
Supreme Cleaning Services Ltd - 4 Year KPIs to Year End 31-Mar-09 231
Sure Clean UK Ltd - 4 Year KPIs to Year End 31-Mar-08 232
Sussex Cleaners Ltd - 4 Year KPIs to Year End 31-Aug-07 233
Swallow Cleaning Contractors - 4 Year KPIs to Year End 29-Feb-08 234
Swift Office & Domestic Cleaners Ltd - 4 Year KPIs to Year End 31-Mar-09 235
T J M Services Ltd - 4 Year KPIs to Year End 31-Dec-08 236
TC Cleaning Contractors - 4 Year KPIs to Year End 31-Mar-08 237
Tewkesbury Cleaning Services Ltd - 4 Year KPIs to Year End 31-Mar-09 238
Thames Cleaning Co Ltd - 4 Year KPIs to Year End 31-Mar-08 239
Thames Valley Ltd - 4 Year KPIs to Year End 31-Mar-08 240
The Adept Cleaning Co.Ltd - 4 Year KPIs to Year End 31-Dec-08 241
The Carroll Cleaning Co Ltd - 4 Year KPIs to Year End 31-Jul-08 242
Three C's Ltd - 4 Year KPIs to Year End 31-Dec-08 243
Tower Group Services Ltd - 4 Year KPIs to Year End 31-Mar-08 244
Trowbridge Office Cleaning Services Ltd - 4 Year KPIs to Year End 30-Sep-08 245
Tudor Contract Cleaners Ltd - 4 Year KPIs to Year End 31-Aug-08 246
Universal Cleaning Ltd - 4 Year KPIs to Year End 31-Oct-08 247
Vanguard Cleaning - 4 Year KPIs to Year End 30-Apr-09 248
We Clean Ltd - 4 Year KPIs to Year End 31-Jul-08 249
Windray Ltd - 4 Year KPIs to Year End 30-Apr-08 250
Wycombe Cleaning Services Ltd - 4 Year KPIs to Year End 30-Nov-08 251
Wycombe Office Contract Cleaners Ltd - 4 Year KPIs to Year End 30-Sep-08 252
Zonecloth Ltd - 4 Year KPIs to Year End 31-Mar-09 253

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In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

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

MTW's *"Research & Analysis"* market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, end user mix, 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 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 2004-2013** – Value of the market since 2004 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, yet stylish charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2013. 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 2013 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, opportunties 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 illusrtation 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 2004 –2013 –** Industry totals and averages since 2004 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 2013.

- **Supplier Review** – This report provides in-depth 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 CONTRACT CLEANING MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK contract cleaning market was estimated to be worth some £x.x billion in
2009, reflect ... owing a
similar contra ... back to
levels previo ... ent
downturn. H ... of
overall GDP ... th for
the contract ...

Average sale ... 009,
reflecting a c ... , growth
is anticipated ... 2013.

With cost sav ... present,
suppliers of e ... ressure
for some tim ... ies for
growth in the ... hygiene
within the wo ... specialist
service provis ...

There is conc ... impact
expenditure ... e
recession is ... ing is
already comm ... re.

SAMPLE

In 2009, pric ...
legislation re ... ber of
additional mi ... , with
current level ...

Following the ... pital
expenditure ... ct
cleaners has ... er than
providing any ... nuted for
growth in ne ...

A tentative r ... ld also
offer some o ... liers in
the medium ... 2010
and 7% in 20 ...

The UK contr ... ng
services in 2 ... a value
of almost £2.8 billion in current price terms.

Whilst 'standard'
market by volum … by
this sector is mo … age
price per contrac

The second large … aning
services, with thi
Between 2004 a … 4%,
from just over £ … and
sustained growth

The window and … und
150% since 200 … has
continued to gai

The office / retai
contract cleaning … e
sector which is e

Leisure and trans … d
13% respectively … The
education sector
spending in rece … rket
and a value of s

SAMPLE

Public buildings … s art
galleries exhibiti … s
having boosted t

The manufacturi … ent
years and is curr … y
value in 2009.

Just over 60% o … ood'
credit rating, ref
standing. The n … ue to
the relative mat … es
active having a l … e
x,400 companies … at
immediate risk o

More than 80% … 9,
with indications … e
next year as the

The South East … rt
reflecting the hig … ea,
coupled with its
target market w … ket
include the Sout
significant.

Sources indicate that all sectors of the contract cleaning market are being
affected
l being
particul
ients,
building
ue into
2010, t
economy
recover

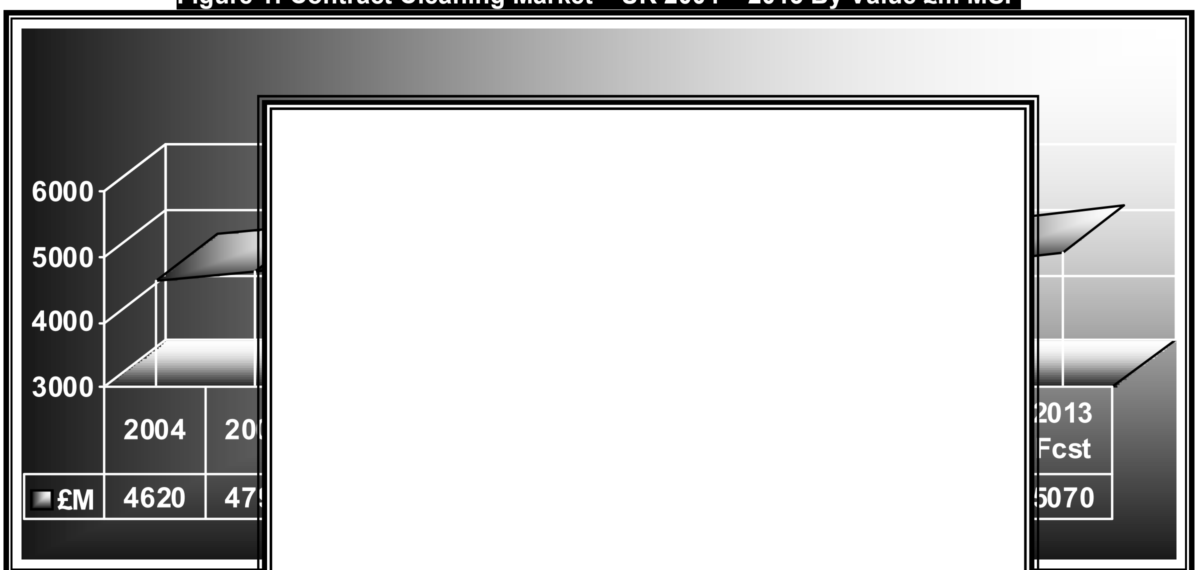
SAMPLE

2.2 CONTRACT CLEANING MARKET SIZE & TRENDS 2004-2013

2.2.1 Contract Cleaning Market Size 2004-2013 – Current Prices

The UK contract cleaning market is estimated to be worth around £x.x billion in 2009 as illustrated in the following chart:-

Figure 1: Contract Cleaning Market – UK 2004 – 2013 By Value £m MSP



rade Estimates

As the above char
ted to have
grown by some 10
trend
toward outsourcin
g volume
demand.

SAMPLE

This healthy perfo
2 quarters
of 2008, though t
rn in
volume demand d
that the
sector experienced
as a
number of key en
kets
reduced demand

By year end Dece
ed to have
declined to just u
some 4%,
with this decline p
.
Contractions in de
notably a
key characteristic
trend
which continued i

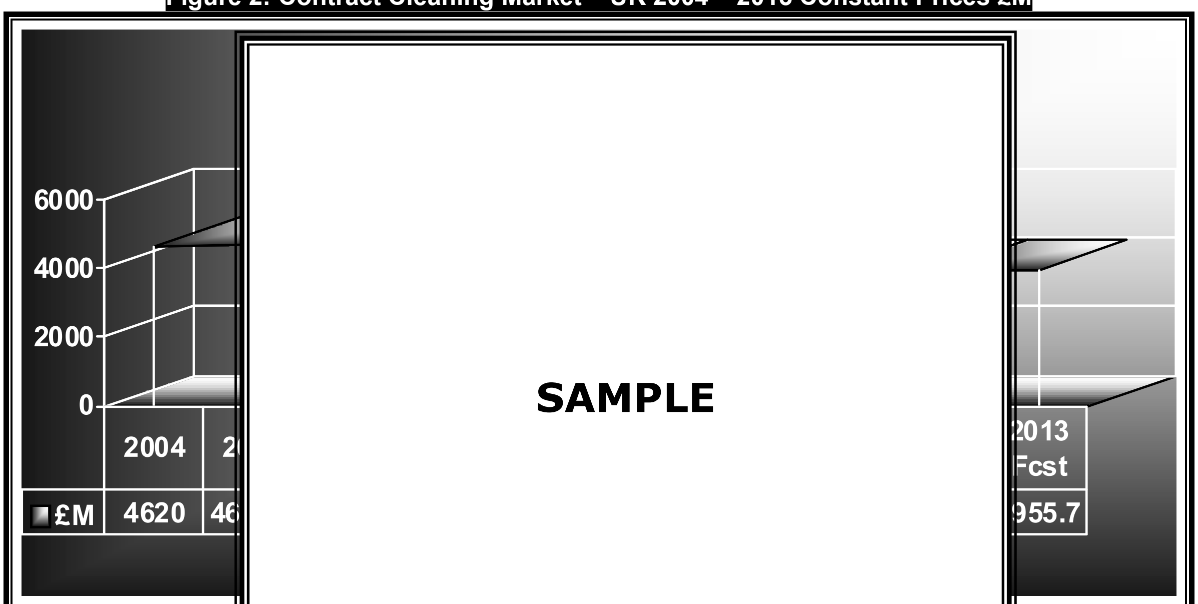
To year end 2009 … annualised terms … reflecting a further and more … ower demand from the … rther declines in volume … s including non-com… manufacturing. W… commodity goods … overall demand contracte… 09 also experienced a furt… SAMPLE … re likely to have experience… evident during the last 12…

At present, marke… ously experienced in 20… d underlining the su… 2007 levels. Neverthele… s of overall GDP outpu… wth for the contract cleani… n.

2.2.2 Contract Cleaning Market Size 2004-2013 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2004, with forecasts to 2013:-

Figure 2: Contract Cleaning Market – UK 2004 – 2013 Constant Prices £M



… Trade Estimates

As illustrated, ba… market has declined by some… he above chart highlights t… the market declining by alm… reflecting a substantial and …

Given the lik … upled
with only mi …
confidence r … and
2011 in cons …
market grow … st to
return by 20 …

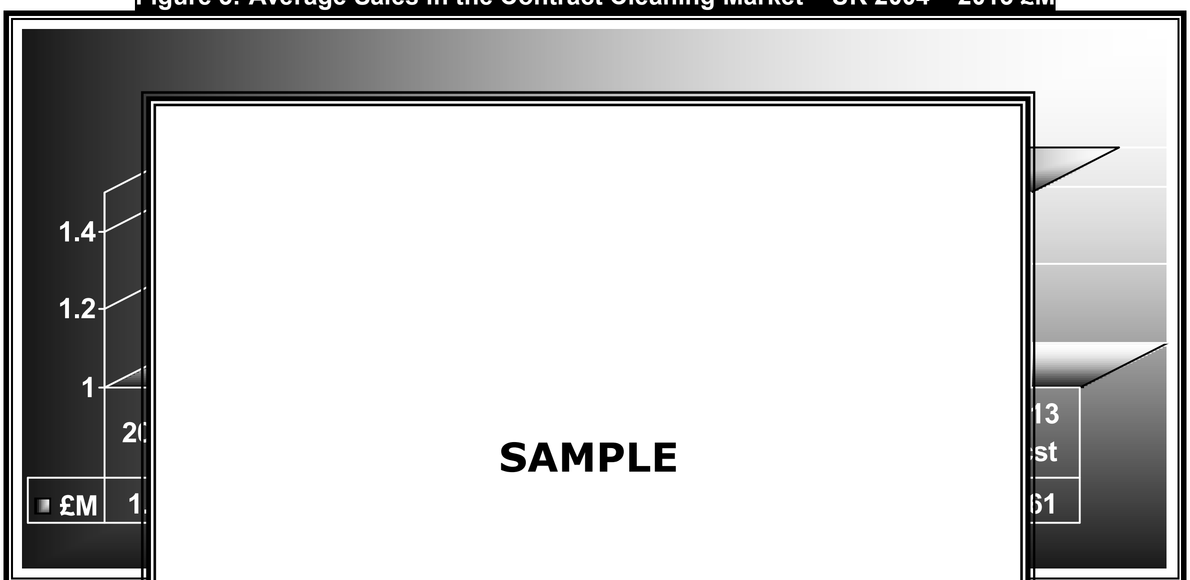
SAMPLE

Sources indi …
affected by …
challenging …
closures and … ,
though pres …
recovers fro …

2.2.3 Average Contract Cleaner Sales Revenue 2004-2013

The following chart illustrates the average level of sales in the contract cleaning market since 2004 and forecasts to 2013:-

Figure 3: Average Sales in the Contract Cleaning Market – UK 2004 – 2013 £M



… rade Estimates

During 200 … und £1.36
million, ref … on of more
than 17% … urn during
2010, reac … 13 as
illustrated …

The contra … sent, with
around 3,4 … wnturn due
to externa … ll being in a
'growth ph … cus on core
competen … tive for the
industry, a … slative
influences … rm.

© MTW Research 2009

Many of th ... gy of cost
saving and ... a key
characteris ... ntract
cleaners a

Sources in ... by the
recession, ... nities. As
such, the ... ps and
those cont ... h
differentia ... likely to
grow share

With many ... market
has becom ... ast year.
Increasing ... cts with
more sites ... ed supplier.

One key a ... is
continuing ... viruses and
hygiene w ... virus
commonly ... e has
increased ... eaning and
associated

Following ... e
governme ... spitals, with
this having ... o continue
to underpi ... ing
services a ... ugh to
deep clean

SAMPLE

Price comp ... within the
UK contrac ... nportant in
recent mo ... there is a
growing ne ... on by
increasing ... on of
compleme ... time
performan ... mobile
cleaners c ... ns are just
two such e ... ce
competitio

Neverthele ... ssure will
remain a k ... erm. The
market is ... h will
inevitably ... ily
emanating ... e sectors
during the ... in non-uk
born labou ... ation
through ne

Trade sources indicate that environmental factors should offer some opportunity
to add va of
environm ich is being
adopted t try though
some are ons are that
the adopt credentials'
is likely t the near
term, und s REACH.

The need tive market
is increas een brought
about by 8. Tighter
legislatio and safety
standards s on their
sites with d achieving
this.

SAMPLE

Future Prospects

In terms of future prospects, the contract cleaning market is likely to experience
a degree o rating on
economies st services
or niche e e subsector
of carpet c cleaned by
office clea The
National C e of
practice fo estoration
of textile f NCCA and
BSI British areas of
cleaning se

The well p ed for the
most part, ues which
are curren ng can play
in the futu ections.
The Gover illion per
annum by ources have
sounded a er
investmen

There is c nt spending
during the future.
However, blic sector
in the sho 2012 in
areas inclu wnturn in
public exp g remains
to be seen ther
outsourcin FM
services.

SAMPLE

2.3 KEY MARKET TRENDS IN THE CONTRACT CLEANING MARKET

The following section reviews some of the key trends in terms of financial performance of the UK contract cleaning market since 2004, and forecasts to 2013.

2.3.1 Contract Cleaning Industry Profitability 2004-2013

The following table illustrates the performance of the Contract Cleaning market in terms of profitability between 2004 and 2009 and provides forecasts to 2013:-

Figure 4: Contract Cleaning Market Profitability – UK 2004 – 2013 £M

Source: MTW Research / Trade Estimates

Profitability levels in the contract cleaning market peaked in 2007 at just under
£180 ... Between
2004 ... by strong
dem ... oth public
and ... as the
indu ... th static
wage ... born
empl

SAMPLE

Clea ... ated in the
abov ... nimum Wage.
With ... 2008 and
2009 ... rising labour
costs ... ars, with a
subs

In 20 ... om
legis ... number of
addit ... bility, with
curre ... 2007, this
refle

With the ... rly-mid
2010, co ... ber of
measures ... ost reduction
and cash ... pliers to the
contract ... nditure is
also set t ... should
continue ... short term.
The low l ... ng
equipmen ... also
exacerba ... SAMPLE ... es seek to
achieve g ... nt
manufact ... lying to this
sector in

By 2012, ... o levels
previousl ... and should
offer som ... rm, as
contract ... ncrease
capital ex ... 2007 is
unlikely t ... % per year in
2011/2012.

The level of average profitability in the contract cleaning industry between 2004 and 2013 is illustrated in the following chart:-

Figure 5: Contract Cleaning Market Average Profitability – UK 2004 – 2013 £M

rade Estimates

There are ... cleaning
companies ... ed at just
under £40 ... overall
industry p ... £50,000,
reflecting

Rising ences
resulte rity of
this co
contin

At pre nated to
stand key
issues

Source n 3% in
2009, ely to
fall mu en found
by clie r unable
to red

One s cost
saving y to the
suppli of
negoti agreeing
unviab ss or
force t n wage,
for ex

SAMPLE

The ne service
is also ore
volum e
benefi on to
the cu result in
a grow ers
seek t

One k ractors
operat ive
syster cally
leads t nimal
amour

Averag g to
just o low
experi and
contra - a rise
of som

2.3.2 Contract Cleaning Industry Assets 2004-2013

The following table illustrates the Contract Cleaning market in terms of current and fixed assets between 2004 and 2009 and forecasts to 2013:-

© MTW Research 2009

Figure 6: Total Asset Performance – UK 2004 – 2013 £M

SAMPLE

...rade Estimates

Since 2004 ... ssets owned
by the con ... alue of just
over £5.3 ... rapid
growth is ... re by
contract cl ... m buoyant
activity in ...

However, ... months,
capital exp ... ing
focused on ... g any
additional ... and 2009,
total asset ... nfluenced
by a rise i ... ome 9.5%
during 200 ...

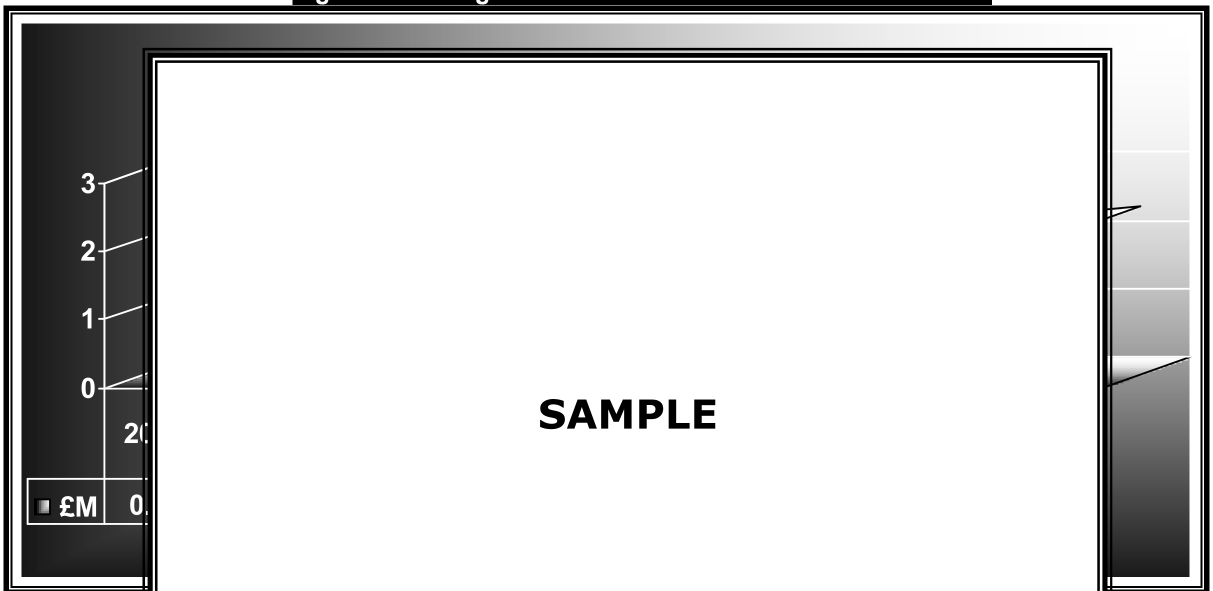
Against a ... nable to
sustain an ... 008 and
into 2009, ... such, to
year end D ... l 6.5%,
reflecting ... on and
liability gr ...

However, ... sing of
maro-econ ... hould
experience ... g
companies ... of 'pent –
up deman ... all asset
growth sh ... ndustry
returns to ...

© MTW Research 2009

The following chart illustrates the performance of the ‘average’ contract cleaning company in terms of fixed and current assets since 2004, with forecasts to 2013:-

Figure 7: Average Asset Performance – UK 2004 – 2013 £M



SAMPLE

le Estimates

As illust million in
2009, r asset
growth the
growth 2010 as
the mar assets to
rise by

Whilst t remains
at partic As such,
indicatio ence a
continua ors are
less will ow
demand

In terms operty
market October
2009 re arket
troughe end 2009
are fore ess
confiden

A tentat uld also
offer so pliers in
the med n 2010
and 7% 2-3%,
real ter t growth
stabilise

By 2011, asset growth is set to outstrip growth in debt as the market returns to
more 'n ... hout a
number ... pressure
from the ... ng slows,
private ... erage
assets a ... llion by
2012.

SAMPLE

2.3.

The follo ... eaning
market

...le Estimates

Total bo ... at an
estimate ... nue in
2009. E ... cting a
buoyant ... in new
equipme

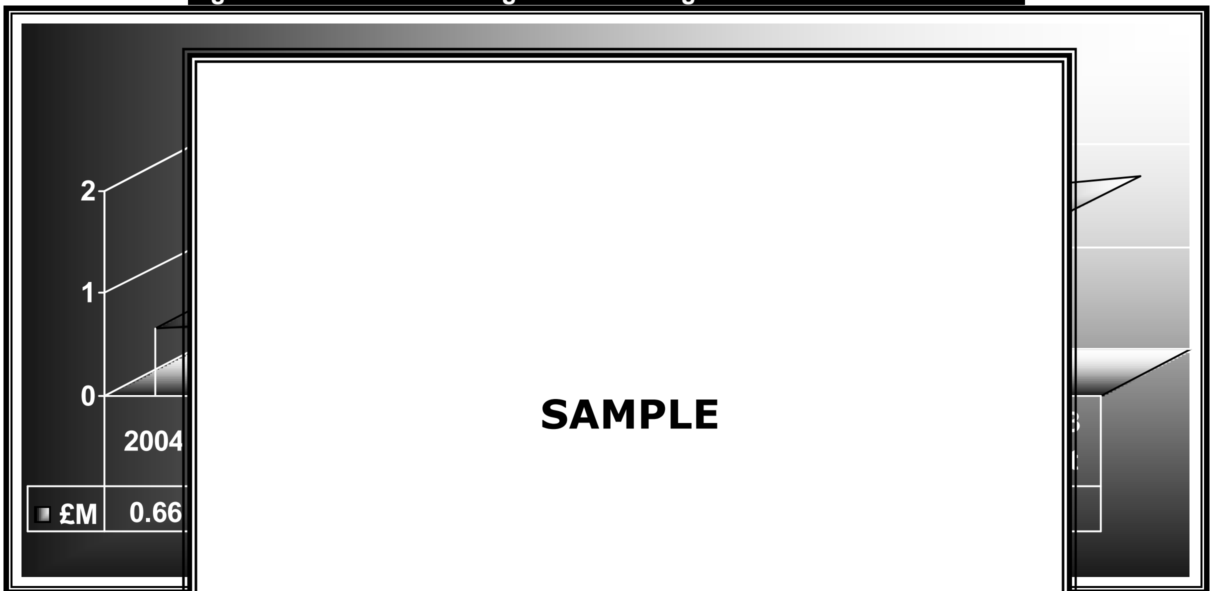
By mid- ... pricing
pressure ... der to
support ... ar to just
under £ ... some
extent,

To year ... ore than
95% of ... leveraged
industry ... nomic
downtu ... e near
term, in ... rt the
industry ... 5.3
billion,

© MTW Research 2009

The following chart illustrates the debt of the average contract cleaning company since 2004, and forecasts likely levels of liability to 2013:-

Figure 9: Contract Cleaning Market Average Debt – UK 2004 – 2013 £M



SAMPLE

le Estimates

As illustrated … und £1.3
million, refle… ate of
growth than …

In the short … nd 8% in
2010 and 20… els of
current asset… term.
Indications a… ar, capital
expenditure … 010
overall, as c… enerally
characterised… vestment
during H1 20…

With debt us… fficult
trading perio… um-longer
term as the … 3,
average debt… eturns to
a more stabl…

2.3.4 C…

The following… ing
market in te…

Figure 10: Contract Cleaning Market Net Worth – UK 2004 – 2013 £M

SAMPLE

rade Estimates

As illustrat in terms
of net wort 4 year
period. W quarter of
2008 provi volume
demand in nance
overall in t

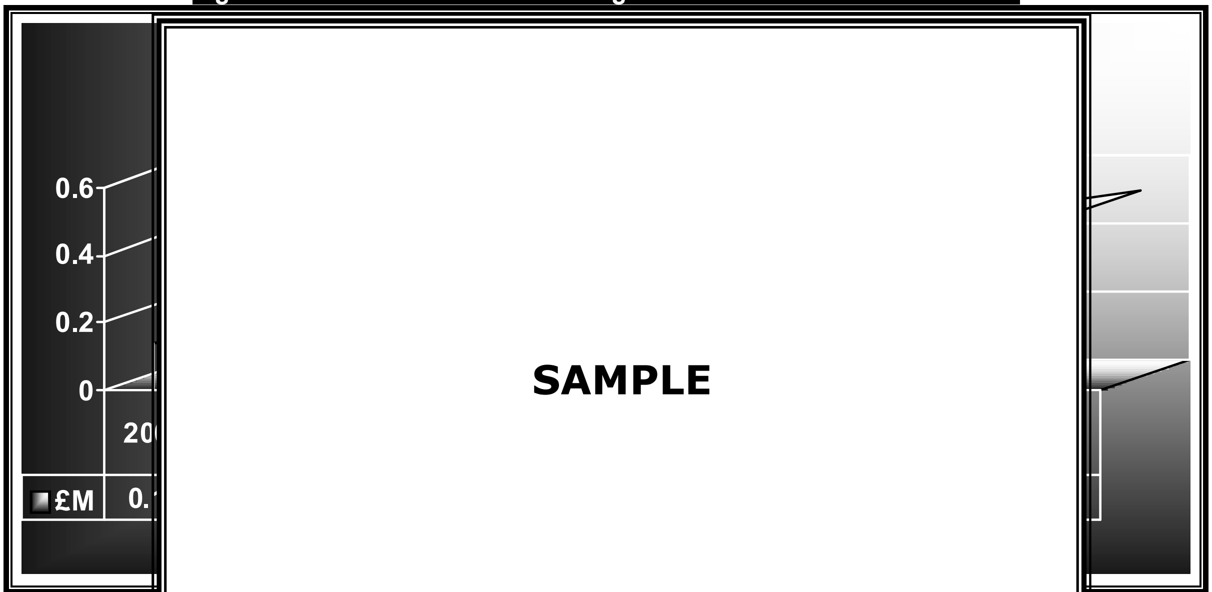
In 2009, i some
extent, tho d in the
industry ea is
estimated landing',
considering

Given the nwards,
forecasts f rm, rising
by around 2013 of
around 8-9

One key fa optimism
for the me of
profitability ets.
Current fo around
2.8% to a it an
industry w g term.

The followi ns of net
worth for t 2013:-

Figure 11: Contract Cleaners Average Net Worth – UK 2004 – 2013 £M



SAMPLE

e Estimates

In 2009, th … of
around £3 … 3. In
line with ot … n 2004
and 2008, … rowth
reflects gro … hout the
industry du … oupled
with minim …

As the eco … t high
levels of m … kely to
grow in thi … d to
raise wage …
exacerbate … rope as
many Polis … untry by
their gover … ter
controls re … ur
available t … vages.

Against a b … n will be
negated in … be
increasingl … n terms
of net wort … , are
likely to re … hich
were expe …

By 2013, o … value of
around £50 … erm
prospects … mpt
greater co …
improved … t
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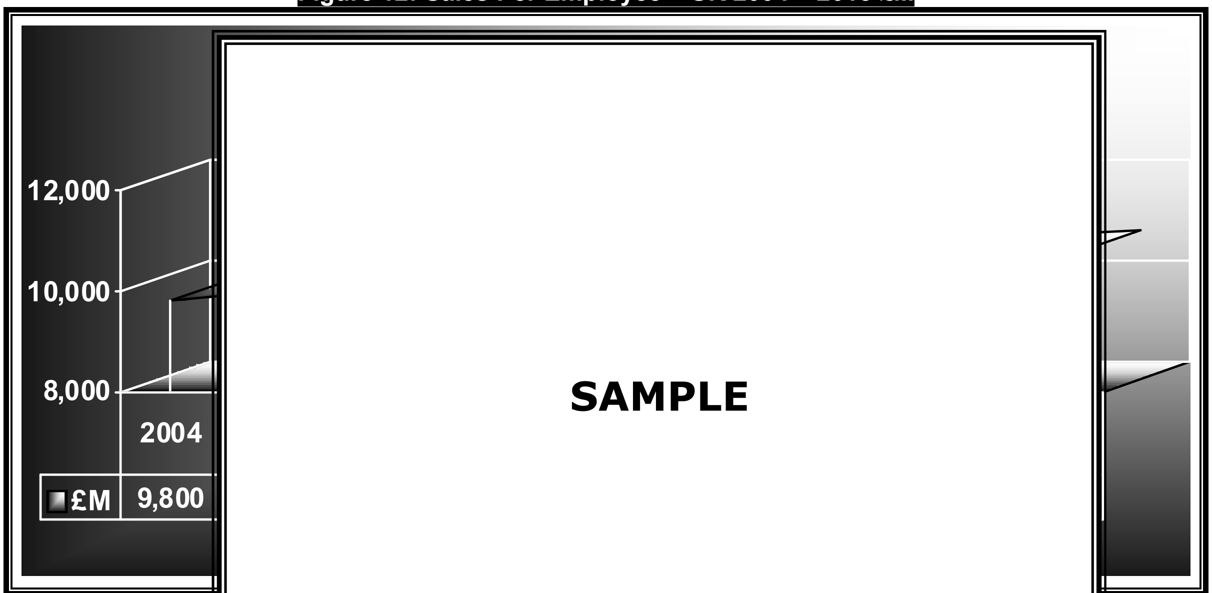
2.3.5 Sales Per Employee in Contract Cleaning Market 2004-2013

The following chart illustrates our estimates of the average turnover per employee within the contract cleaning market since 2004 and provides a forecast to 2013:-

Figure 12: Sales Per Employee – UK 2004 – 2013 £M



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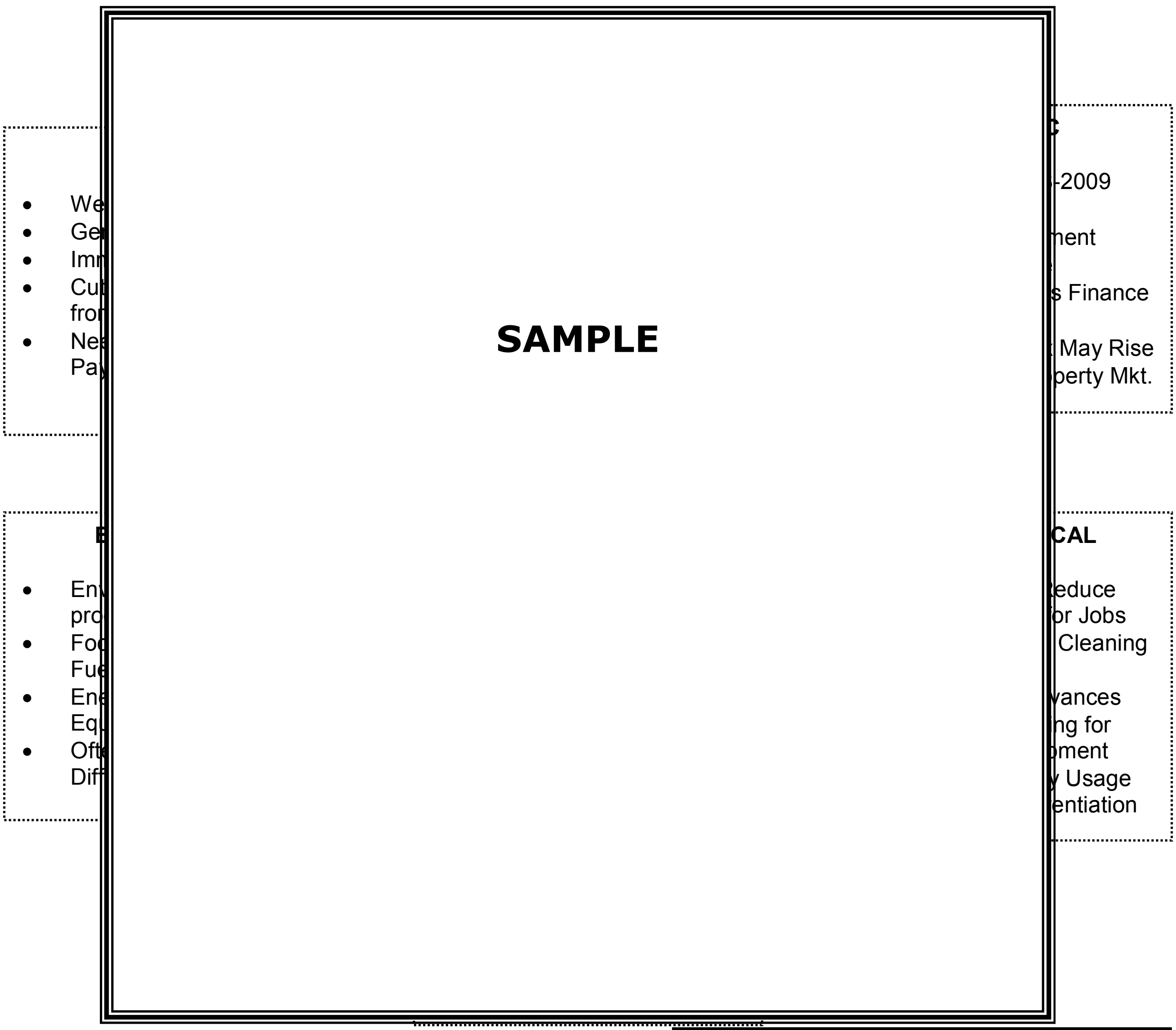
2.4 KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

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 2009



Source: MTW Research Strategic Review 2009

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.

© MTW Research 2009

2.4.2 Political & Legal Influences & Trends

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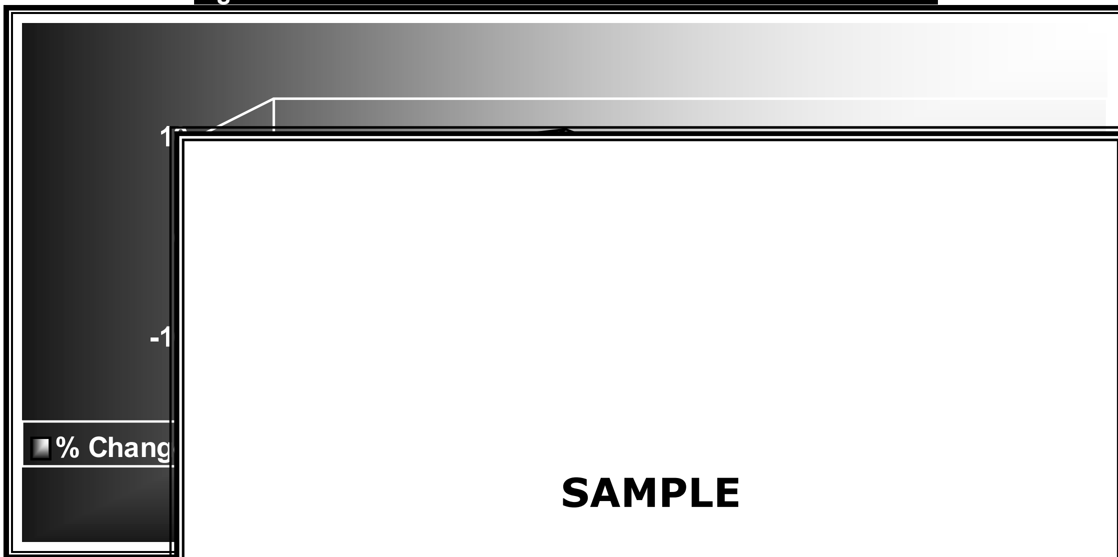
Figure 14: UK Economic Annual Performance– GDP 2004-2013



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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 2009-2013

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

Figure 19: Key Opportunites & Threats in the Contract Cleaning Market 2009-2013

OPPORTUNITIES	THREATS
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2.5 CONTRACT CLEANING PRODUCT / SERVICE MIX

2.5.1 Share by Contract Cleaning Sector 2004, 2009 & 2013

The share accounted for by each of the key sectors within the UK contract cleaning market in 2009 is illustrated in the following chart:-

Figure 20: Share by Key Product Sector in Contract Cleaning Market 2009

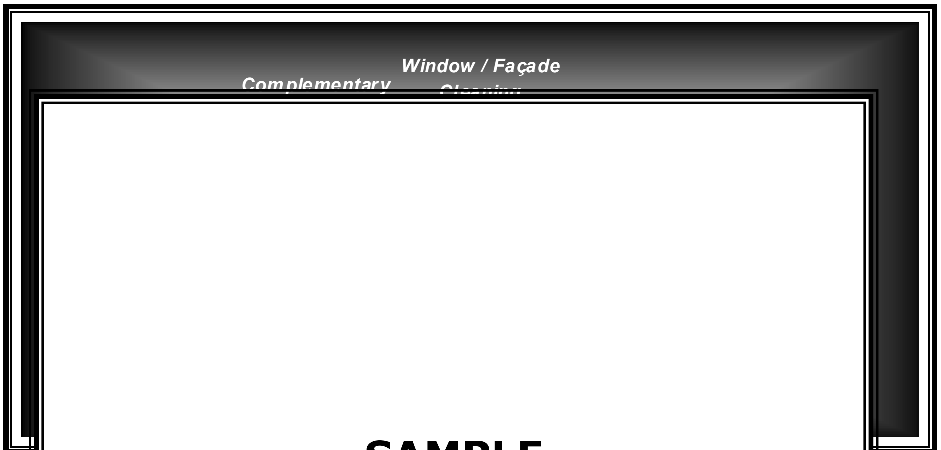

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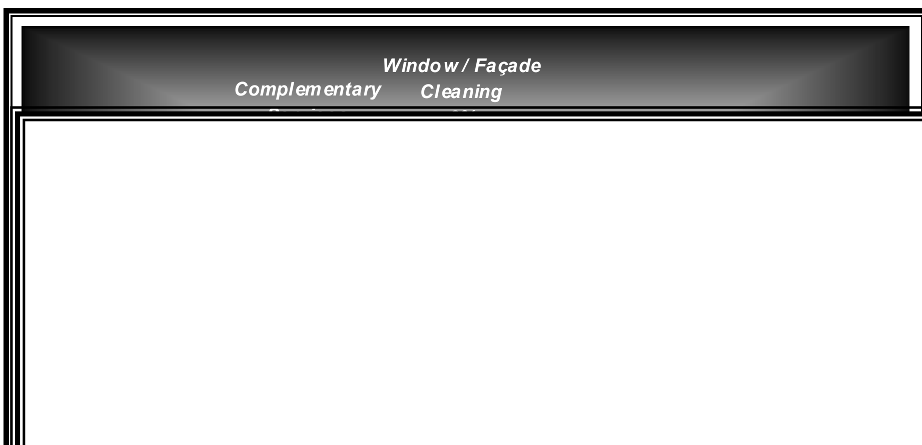
Figure 22: Forecast Share by Key Sector in Contract Cleaning Market 2013



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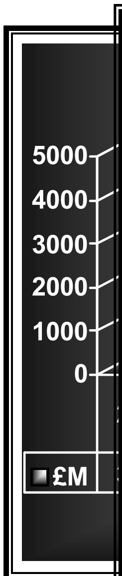
2.5.2 Standard Contract Cleaning Market 2004-2013

The following chart illustrates the performance of the 'standard cleaning' sector of the contract cleaning market b value since 2004 and forecasts to 2013:-



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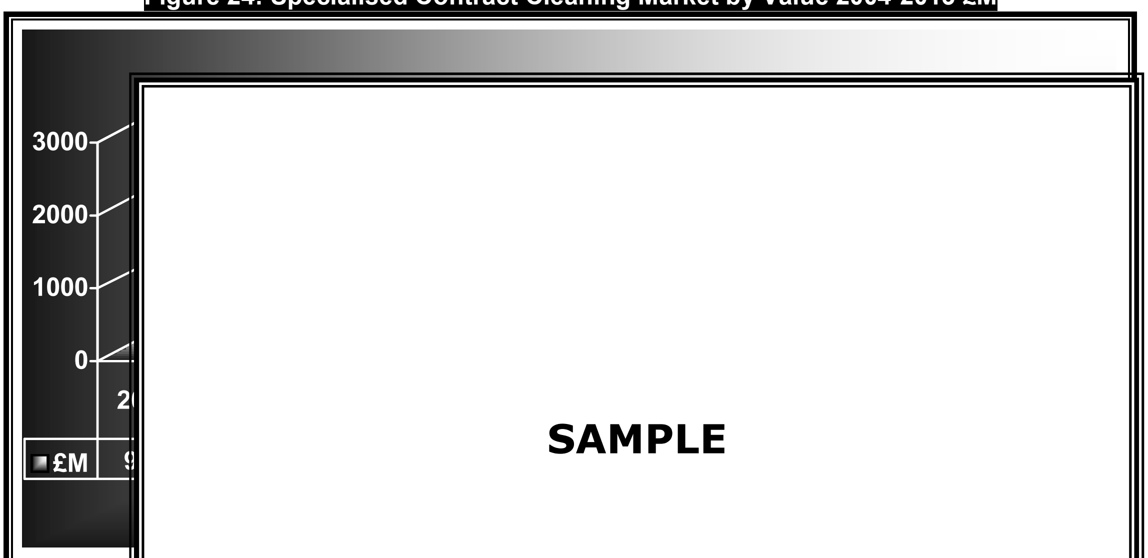
2.5.3 Specialised Contract Cleaning Market 2004-2013

The following chart illustrates the performance of the 'specialised cleaning' sector of the contract cleaning market b value since 2004 and forecasts to 2013:-

Figure 24: Specialised Contract Cleaning Market by Value 2004-2013 £M



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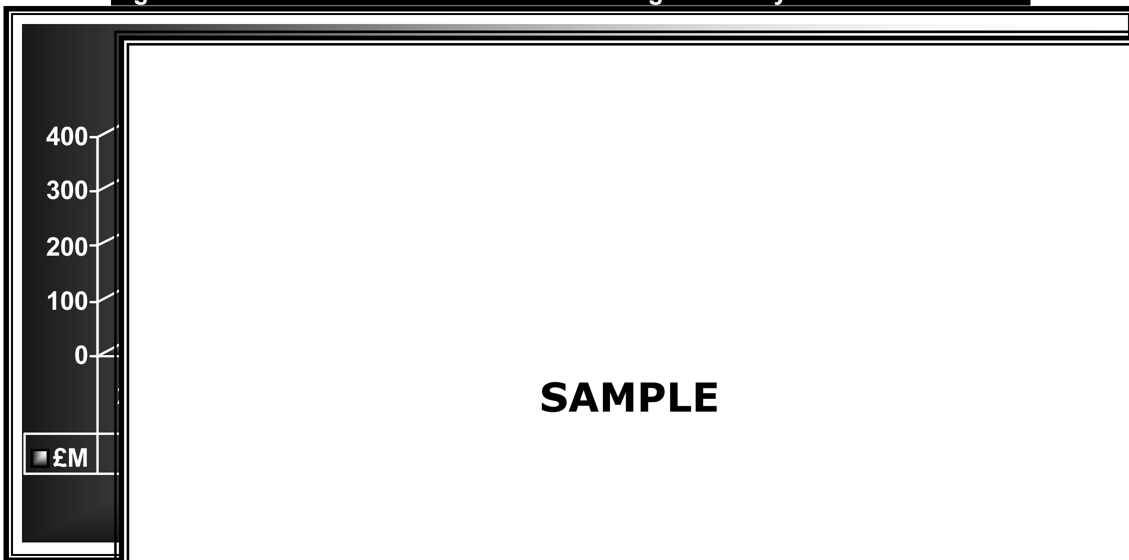
2.5.4 Window / Facade Contract Cleaning Market 2004-2013

The following chart illustrates the performance of the 'window / facade cleaning' sector of the contract cleaning market b value since 2004 and forecasts to 2013:-

Figure 25: Window / Facade Contract Cleaning Market by Value 2004-2013 £M



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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 2004, current share in 2009 and provides a forecast share for 2013.

2.6.1 Share by Key End Use Market 2004, 2009 & 2013

The contract cleaning 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 2009 by value:-

Figure 26: Share by Key End Use Sector in Contract Cleaning Market 2009

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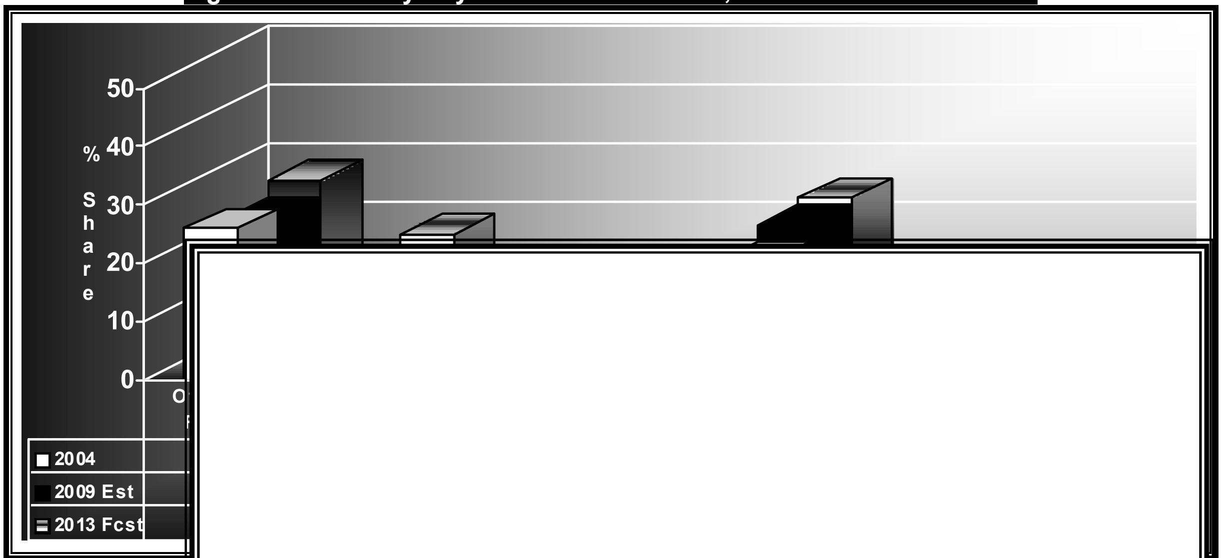
Figure 28: Share by Key End Use Sector 2004, 2009 & Forecasts to 2013



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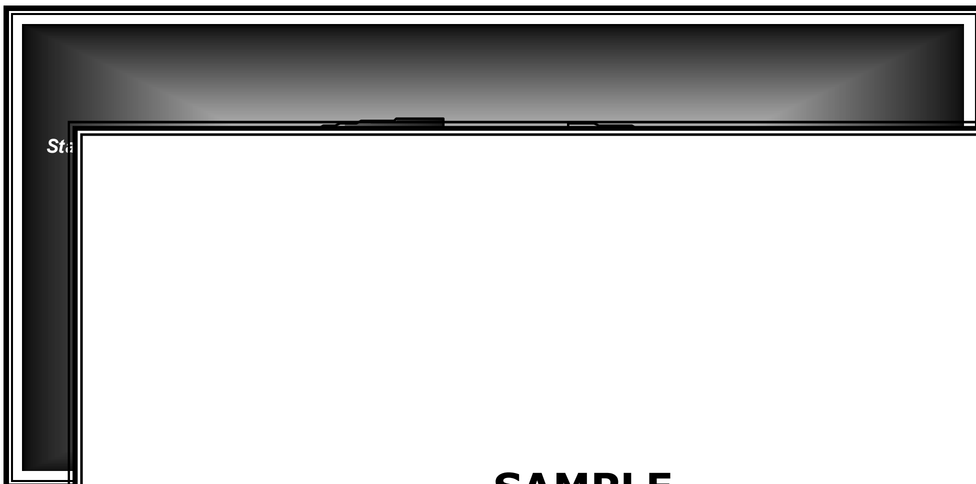
3. THE CONTRACT CLEANING INDUSTRY

3.1 Contract Cleaning Industry Structure in 2009

3.2.1 Industry Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 29: Market Share by Contract Cleaning Company Sales Growth / Decline 2009



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3.2.2 Industry Share by Credit Rating in 2009

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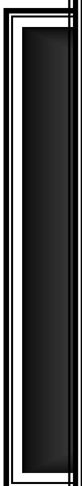

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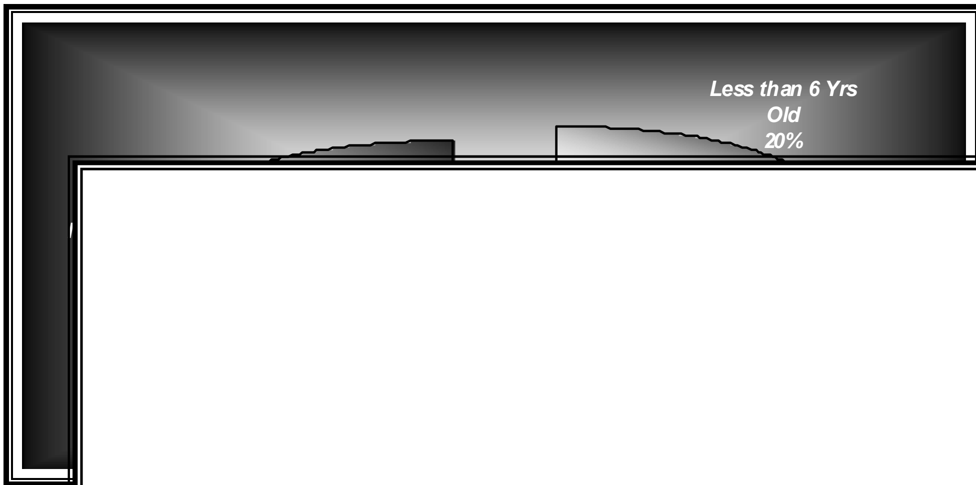
Figure 31: Market Share by Company Age in the Contract Cleaning Market 2009



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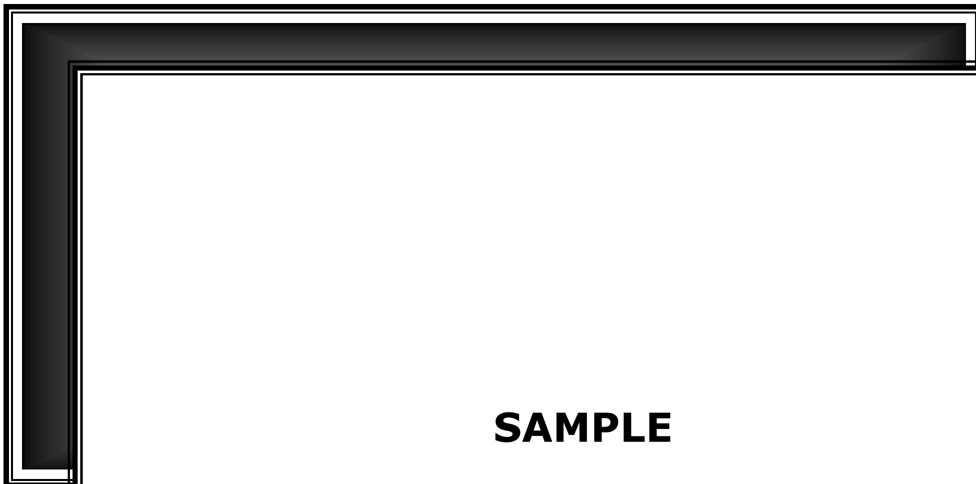
whilst there may be some further reductions in the number of organisations operating in the sector in the short term, over 90% of the industry is regarded as being at minimal risk from the current economic downturn and rising pressures in the market.

3.2.4 Industry Share by Number of Employees in 2009

The following chart illustrates how the contract cleaning industry is segmented by number of employees as of November 2009:-

Figure 32: Mix by Number of Employees in the Contract Cleaning Market 2009



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3.2.5 Industry Mix by Turnover Band in 2009

The following chart illustrates the share taken by turnover band of all the estimated x,x00 UK contract cleaners active as of November 2009:-

Figure 33: Share by Turnover Band in the Contract Cleaning Market 2009

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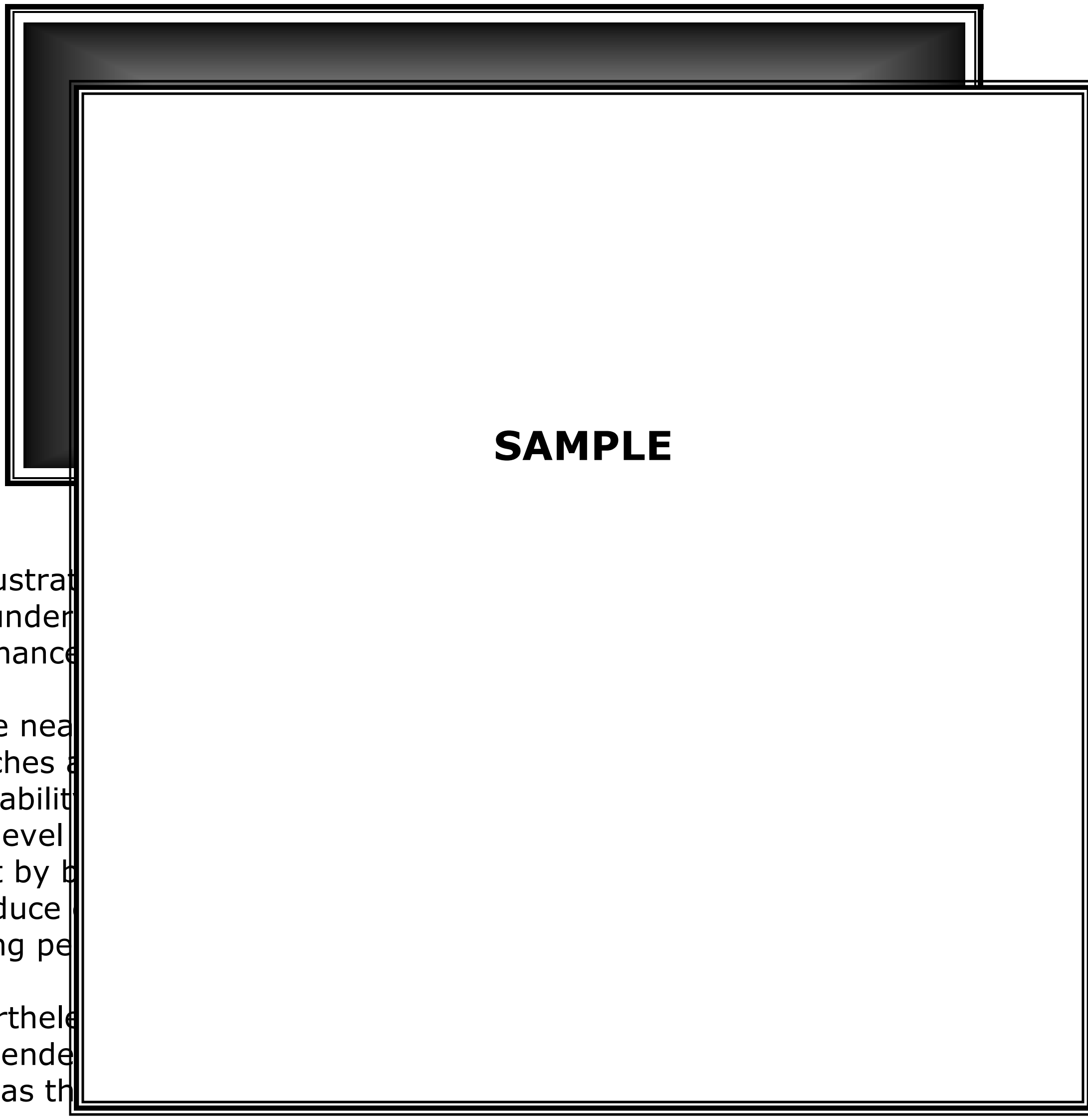
3.2.6 Industry Share by Location Type in 2009

The following chart illustrates the structure of the UK contract cleaning market in terms of office / location type in November 2009:-

© MTW Research 2009

Figure 34: Mix by Location Type in the Contract Cleaning Market 2009



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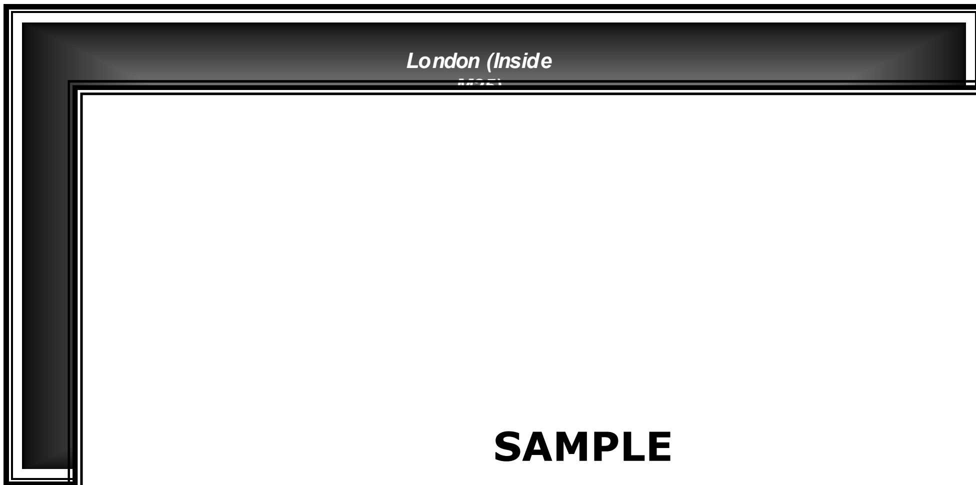
3.2.7 Industry Mix by Geographical Region in 2009

The UK contract cleaning market is well represented in all areas of the UK in November 2009, as illustrated in the following chart:-

© MTW Research 2009

Figure 35: Mix by Location Type in the Contract Cleaning Market 2009



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4. RANKINGS FOR CONTRACT CLEANERS IN 2009

4.1 Contract Cleaning Companies Listing

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

Figure 36: Contract Cleaning Company Listing

1st Omega Contract Cleaning
A J Procter Cleaning Contractors Co
Able Cleaning Services
Ableclean
Abracadabra Services
Acre Industrial & Cleaning Services
Aim Hygiene Services
Albyon
Alliance Cleaning Services
Alternative Cleaning
Angel Cleaning Services
Apex Cleaning Services
Aramark Holdings Limited
Archgate Cleaning & Support Services
Ashbon Services
Ashford Cleaning Contractors
Atkins & Gregory
Atlas Cleaning
Ayleton Cleaning
AYS
BCM Services
Bespoke Cleaning Contractors
Birkin Cleaning Services
Blitz Cleaning & Maintenance
Blue Diamond Services Limited
Bluebay Cleaning Services
Bush Brush Cleaners
Busy Bee Cleaning
C P S Group
Capital Maintenance Services
Carlisle Cleaning Services
Carlton Cleaning Contractors
Caroline Mondo Cleaning
Celtic Cleaning
Central Industrial Services
Chrysalis Cleaning
City Cleaning Contracts
Civic Maintenance Services
Classic Cleaning Services
Clayton Cleaning Consultants
Clean Image
Clean Living Property Services Limited
Clean Office Services
Clean Slate
Cleanbright Services
Cleanbrite
Cleaner Care
Cleaning Choices
Cleaning Enterprises
Cleanit Contract Services
Cleanrite
Completely Clean
Consortium Cleaning Services
Consultant Cleaners
Corporate Hygienics
Counties Cleaning Services
Courtesy Cleaning Services
Cranes Cleaning Co.
Crusader Cleaners
D P Cleaning Services
Delta Cleaning Services
Deniva Cleaning Services
Diamond Commercial Cleaning
Dolphin Cleaning Services
Dougland Support Services
Dusters Wales
Easy Clean Services
Ecosse Contract Services
Edwards Commercial Cleaning
Emprise Plc
Enviroclean Services
Euroclean Contractors Limited
Europa Support Services
Executive Cleaning
Falcon Cleaning Services
Farnham Office Cleaning Co
Finclean S K J
Floorbrite Cleaning Contractors
Fluid Options UK Limited
Footprint Cleaning
G S F Sandylight
GBM Support Services Group
Glen Cleaning Co
Glencross Cleaning
Glenn Management
Global Multi Service
Goldenclean
Goldservice Contract Cleaning
Grade One
Graduate Services
Hall Cleaning Services
Hayward Services
HBS Europe Services
Hitech Equipment
Hopkins Cleaning Services
Hygienic Cleaning Co Uk
Ideal Cleaning Services
Insitu Cleaning Co
Integrated Cleaning Management
Inter County Service Group
Interclean Commercial
Inverclean Services
ISS Facility Services
J V S Cleaning Services
Jani-King (GB)
Jardak Services
K G B Cleaning & Support Services
Keencraft
Kenkleen
Kite Contract Cleaning
Lakethorne
Lancaster Office Cleaning
Landmark Facilities Management
Langley Office Maintenance
LCC Support Services
M & B Services Gb
M & D Cleaning Services
Martyn Madden
Mavis Russell Cleaning
Meridian Contract Services
Millard's
Millennium Cleaning
Mitie Cleaning & Support
Monitor Services
Monthind Clean
N R C Services
North Downs Cleaning & Maintenance
North East Cleaning Services
North Star
OCS Group

© MTW Research 2009

Optim Contract Services
Orion Cleaning Co
Pacemaker
Paneless Services
Phoenix Contract Services
Pips Cleaning Services
PKM Cleaning
Poplars F.M
Premier Cleaners
Premier Cleaning & Hygiene Services
Premier Contract Cleaning
Premier Contract Services
Prestige Cleaning Contractors
Progressive Cleaning
Prokleen Uk
Purley Contract Cleaning Co
Regent Office Care
Region Clean
Rentokil Initial Plc
Resource (UK)
Response Services
Reynard Cleaning
RGS Cleaning
Riverside Contract Cleaning Services
Robinson Hygiene Services
SCB Services
Scot Kleen
Scotia Clean Teck
Servicemaster
Smart Cleanings UK
Sofisti-Clean Limited
Sparkle Cleaning Co
Spick & Span
Supreme Cleaning Services
Sure Clean UK
Sussex Cleaners
Swallow Cleaning Contractors
Swift Office & Domestic Cleaners
T J M Services
TC Cleaning Contractors
Tewkesbury Cleaning Services
Thames Cleaning Co
Thames Valley
The Adept Cleaning Co.
The Carroll Cleaning Co
Three C's
Tower Group Services
Trowbridge Office Cleaning Services
Tudor Contract Cleaners
Universal Cleaning
Vanguard Cleaning
We Clean
Windray
Wycombe Cleaning Services
Wycombe Office Contract Cleaners
Zonecloth

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

4.2 Contract Cleaners Ranking By Turnover

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

Figure 37: Contract Cleaning Companies Ranked By Turnover 2008

1	O		47	N	
2	IS		48	Tu	
3	R		49	Pr	rvices
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12	At		58	La	
13	S		59	Mi	
14	C		60	Cr	
15	In		61	Cl	
16	Id		62	La	
17	K	vices	63	Int	
18	L		64	La	nt
19	R		65	Or	
20	C		66	Tr	vices
21	C		67	W	
22	Ja		68	T	
23	C		69	Th	
24	B		70	Gl	
25	F		71	Ab	
26	D		72	Cl	
27	A		73	M	
28	C		74	Hy	
29	G		75	W	
30	G		76	At	
31	A	ices	77	Ca	
32	F		78	Ed	Services
33	M		79	Bu	
34	Fi		80	Sc	
35	C		81	Ab	
36	F		82	Cl	
37	M		83	AY	
38	H		84	Cl	
39	H		85	PK	
40	B		86	Pa	
41	T		87	Ha	
42	W		88	Be	
43	N		89	Re	
44	A		90	Re	
45	O		91	RC	
46	Clean Living Property Services Limited		92	Clean Slate	

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151 M
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153 H
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155 C
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169 F
170 F
171 C
172 T
173 S
174 C
175 E
176 K
177 C
178 C
179 E
180 S
181 A
182 M
183 C
184 S
185 A
186 Caroline Mondo Cleaning Services

Source: MTW Research / Trade Sources

4.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2008:-

Figure 38: Contract Cleaning Companies Sales Estimates 2008

Trading Name	08 Trnover £M
C	£550
IS	£490
R	£400
M	£200
R	£85
L In	£80
E	£68
T	£50
E	£47
G	£45
In	£45
A	£35
S	£25
C	£25
In	£25
Ic	£15
K	£15
L	£15
R	£14
C	£14
C	£10
J	£8
C	£8
B	£8
F	£8
D	£8
A	£7
C	£5
G	£5
G	£5
A	£5
F	£5
M	£5
F	£5
C	£5
F	£5
M	£4
H	£4
H	£4
B	£3
T	£3
W	£3
N	£3

Trading Name	08 Trnover £M
As	£3
O	£3
Cl	£3
N	£3
T	£2
Pr	£2
N	£2
G	£2
R	£2
A Se	£2
In	£2
G	£2
Pr	£2
Th	£2
La	£2
M	£1.5
Cr	£1.5
Cl	£1.5
La	£1.5
In	£1.5
La	£1.5
O	£1.5
Tr	£1.5
W	£1.3
T	£1.3
Th	£1.2
G	£1.2
Al	£1.2
Cl	£1.1
M	£1.1
Hy	£1.1
W	£1.1
Al	£1.0
Ca	£1.0
Ed	£1.0
Bu	£0.9
Sc	£0.9
Al	£0.8
Cl	£0.8
AY	£0.8
Cl	£0.8

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Trading Name	08 Trnover £M
PK	£0.8
Pa	£0.7
Ha	£0.7
Be	£0.7
Re	£0.7
Re	£0.7
RG	£0.7
Cl	£0.6
Pa	£0.6
Sw	£0.6
Ca	£0.6
Cl	£0.6
As	£0.6
Ab	£0.5
Mi	£0.5
Go	£0.5
Co	£0.5
Pr	£0.5
Sp	£0.5
Ay	£0.5
D F	£0.4
Ma	£0.4
Ja	£0.4
Gr	£0.4
Eu	£0.4
An	£0.4
A J	£0.4
Ma	£0.4
En	£0.4
To	£0.3
Ce	£0.3
Ke	£0.3
Su	£0.3
Fa	£0.3
Un	£0.3
Va	£0.3
Do	£0.3
Su	£0.3
Bl	£0.3
Co	£0.3
J V	£0.3
Ea	£0.3
Bu	£0.3
Ap	£0.3
Ed	£0.3
Co	£0.3
Te	£0.3
Sp	£0.3

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Trading Name	08 Trnover £M
Su	£0.2
Reg	£0.2
Alli	£0.2
Zon	£0.2
Nor	£0.2
SO	£0.2
Del	£0.2
Pip	£0.2
Riv	£0.2
Gol	£0.2
Cla	£0.2
Dus	£0.2
Hop	£0.2
Dia	£0.2
Alte	£0.2
Inte	£0.2
Cle	£0.2
BO	£0.2
Me	£0.2
1st	£0.2
HB	£0.2
Tha	£0.2
City	£0.1
Pol	£0.1
Pro	£0.1
Wy	£0.1
Pur	£0.1
Kite	£0.1
Con	£0.1
Pre	£0.1
Chr	£0.1
Cle	£0.1
Pre	£0.1
Den	£0.1
Pre	£0.1
Sw	£0.1
Fa	£0.1
Pho	£0.1
Cou	£0.1
Thr	£0.1
Sco	£0.1
Glo	£0.1
Exe	£0.1
Kes	£0.1
Cle	£0.1
Cra	£0.1
Blu	£0.1

4.3 Contract Cleaners Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the contract cleaners in 2008:-

Figure 39: Contract Cleaning Companies Ranked By Profit 2008

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1	R	
2	IS	
3	M	
4	O	Services
5	E	ntenance
6	L	
7	E	
8	R	Services
9	T	
10	G	
11	C	
12	C	
13	K	
14	In	
15	In	
16	A	
17	D	
18	L	
19	R	ent
20	C	
21	F	ervices
22	S	
23	G	
24	G	
25	A	
26	F	
27	M	
28	F	
29	C	
30	F	
31	Id	
32	M	
33	H	g Services
34	H	
35	B	
36	T	
37	W	
38	N	
39	A	
40	O	
41	C	
42	N	
43	Ja	s
44	C	
45	B	

91 RGS Cleaning 139 Delta Cleaning Services (Scotland)
92 C
93 P Services
94 S
95 C ts
96 C
97 A
98 A ing
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120 aners
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127
128
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138 rvices

Source: MTW Research / Company Accounts

4.4 Contract Cleaners Ranking by Assets

The following table illustrates our estimates of the rank by total fixed and current assets for each company in 2008:-

Figure 40: Contract Cleaning Companies Ranked By Assets 2008

1. R
2. IS
3. C
4. M … es Limited
5. A
6. E … Services
7. R
8. G
9. A … ntenance
10. In … Services
11. L
12. T
13. R
14. C
15. Id
16. In
17. C
18. C … s
19. C
20. D
21. L … ervices
22. K … nent
23. B
24. F
25. C
26. F
27. A
28. G
29. H
30. A
31. A
32. G
33. W
34. C
35. M … s
36. P
37. F
38. F
39. C
40. H … ng Services
41. N
42. T … rs
43. B
44. C … s
45. T … ng

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91. Classic Cleaning Services
92. AY
93. Pr
94. Pa
95. D
96. Co
97. Gr
98. Ab
99. Re
100. Ca
101. Sp
102. Cl
103. Mi
104. Ap
105. Ma
106. Su
107. Pi
108. Eu
109. Ay
110. Ma
111. Va
112. Ur
113. Ja
114. Ar
115. A
116. Bu
117. Ec
118. Pr
119. To
120. Ea
121. Ke
122. Fa
123. SC
124. Ki
125. Co
126. Do
127. J
128. No
129. Te
130. BC
131. Bl
132. Re
133. Su
134. Sw
135. Co
136. Al
137. Zo
138. Go
139. Co

140. Premier Contract Services (Bristol)

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4.5 Contract Cleaners Ranking by Debt

The following table illustrates the rankings by total debt for each company in 2008:-

Figure 41: Contract Cleaning Companies Ranked By Debt 2008

1. R
2. IS
3. O
4. M
5. A
6. E
7. E
8. R
9. In
10. L
11. A
12. T ... s Limited
13. G
14. C
15. R
16. In
17. D
18. C
19. B
20. K
21. A
22. Id
23. F
24. A
25. C
26. C
27. L
28. G
29. H
30. M
31. F ... Services
32. O ... s
33. F
34. B ... tenance
35. W
36. H
37. P
38. G
39. A ... g
40. N
41. F ... ent
42. N
43. T
44. T
45. P
46. L
47. G

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95. Martyn Madden
96. E
97. E
98. A
99. E
100. F
101. H
102. C
103. C
104. E
105. J
106. S
107. M
108. C
109. F
110. E
111. T
112. M
113. S
114. A
115. E
116. M
117. C
118. C
119. T
120. U
121. F
122. C
123. C
124. F
125. F
126. E
127. F
128. F
129. C
130. S
131. C
132. C
133. F
134. K
135. C
136. F
137. S
138. D
139. Z
140. A
141. A
142. C

143. Busy Bee Cleaning

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Contract Cleaners Ranking by Net Worth

The following table illustrates the ranking for each company by net worth in 2008:-

Figure 42: Contract Cleaning Companies Ranked By Net Worth 2008

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1.	Re		
2.	IS		ervices
3.	O		
4.	Mi		
5.	Re		
6.	G		
7.	Eu		ent
8.	Ca		
9.	Id		
10.	At		
11.	Se		
12.	T		
13.	In		
14.	Ce		
15.	Int		
16.	Re		
17.	C		
18.	En		
19.	La		
20.	G		
21.	Fl		
22.	Ad		
23.	L		
24.	Cl		
25.	Ci		
26.	Th		Services
27.	W		
28.	Hi		
29.	In		
30.	Fi		
31.	Fo		
32.	D		
33.	Ce		
34.	Pr		
35.	K		
36.	R		
37.	N		
38.	Bl		
39.	Cl		
40.	Gl		
41.	La		ervices
42.	Cr		s
43.	N		
44.	Th		
45.	Ha		
46.	Archgate Cleaning & Support Services	92.	Mavis Russell Cleaning

93.	Kenkleen	140.	Sparkle Cleaning Co.
94.	Cl		
95.	A J		
96.	Fa		
97.	T J		
98.	Ha		
99.	AY		
100.	Ur		
101.	Ap		
102.	Te		
103.	Ab		
104.	Ki		
105.	Go		
106.	Eu		
107.	En		
108.	Pr		
109.	De		
110.	Zo		
111.	Di		land)
112.	Cl		
113.	Ja		
114.	Ma		
115.	Int		vices
116.	Ea		
117.	Bli		
118.	La		
119.	Bu		
120.	Du		
121.	Co		
122.	Ch		
123.	Cl		
124.	Su		ervices
125.	Va		
126.	Gl		
127.	Pu		
128.	SO		
129.	Sp		
130.	Ar		
131.	C		
132.	HE		
133.	W		
134.	Pr		
135.	Sc		
136.	Sw		
137.	W		
138.	Co		
139.	Ab		

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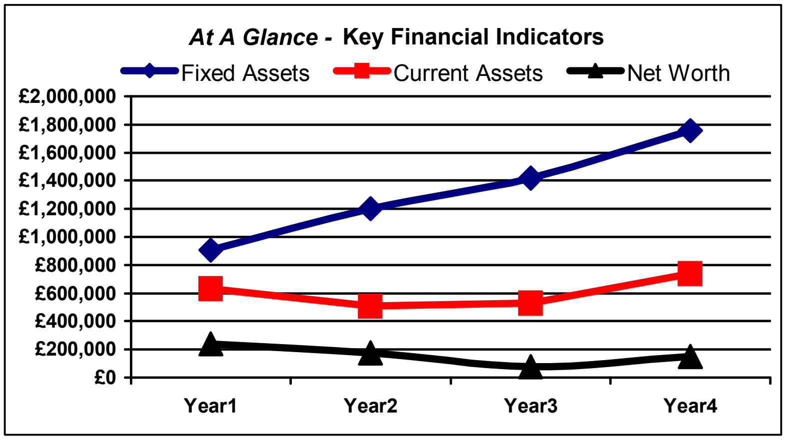
Source: MTW Research / Company Accounts

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

Sample Company - Company Overview & *'At a Glance'*

Unit 5-6
Sample Road
Sample
Sample Postcode
Tel: Sample



Sample Services is a Limited company, incorporated on June 21, 1994. The company's main activities are recorded by Companies House as "commercial cleaning services." In early 2009, the company has an estimated 150-160 employees.

To year end 31-Jul-08, Sample Services is estimated to have achieved a turnover of around £3 million. Pre-tax profit for the same period is estimated at around £0.1 million.

The following table briefly provides a top line overview on Ashbon Services:-

Company Name	Sample Services
Brief Description of Activities	Commercial Cleaning Service
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	150-160
Senior Decision Maker / Director	Sample

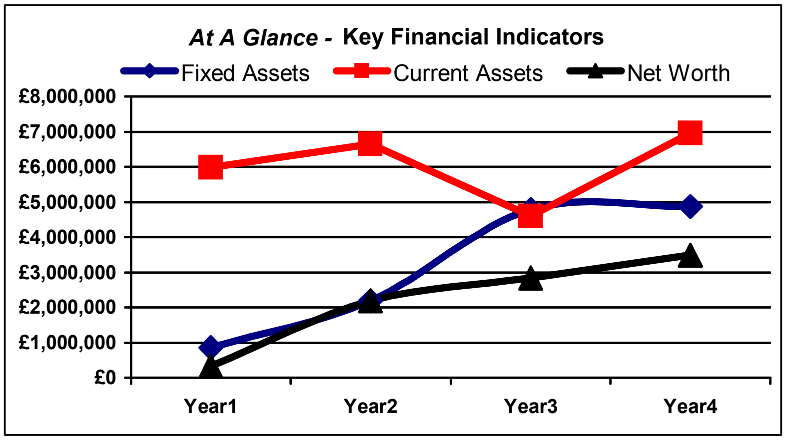
The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Services - 4 Year KPIs to Year End 31-Jul-08

Key Indicator £	Year End 31-Jul-05 (Year1)	Year End 31-Jul-06 (Year2)	Year End 31-Jul-07 (Year3)	Year End 31-Jul-08 (Year4)
Fixed Assets	£908,000	£1,199,000	£1,418,000	£1,755,000
Current Assets	£631,000	£508,000	£528,000	£738,000
Current Liabilities	£831,000	£896,000	£1,128,000	£1,465,000
Long Term Liabilities	£469,000	£637,000	£739,000	£877,000
Net Worth	£239,000	£174,000	£79,000	£151,000
Working Capital	-£200,000	-£388,000	-£600,000	-£727,000
Profit per Employee	n/a	n/a	n/a	n/a
Sales per Employee	n/a	n/a	n/a	n/a

Sample Cleaning - Company Overview & *'At a Glance'*

Sample Road West
Feltham
Sample
Tel: Sample



Sample Cleaning is a Limited company, incorporated on March 5, 1986. The company's main activities are recorded by Companies House as "A group engaged in the provision of office cleaning and security services." In early 2009, the company has an estimated 2250 employees.

To year end 31-Dec-07, Sample Cleaning is estimated to have achieved a turnover of around £35 million. Pre-tax profit for the same period is estimated at around £1 million.

The following table briefly provides a top line overview on Sample Cleaning:-

Company Name	Sample Cleaning
Brief Description of Activities	A group engaged in the provision of office cleaning and security services.
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	2250
Senior Decision Maker / Director	Sample Sample

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

Sample Cleaning - 4 Year KPIs to Year End 31-Dec-07

Key Indicator £	Year End 31-Dec-04 (Year1)	Year End 31-Dec-05 (Year2)	Year End 31-Dec-06 (Year3)	Year End 31-Dec-07 (Year4)
Fixed Assets	£857,000	£2,192,000	£4,785,000	£4,872,000
Current Assets	£5,983,000	£6,642,000	£4,593,000	£6,953,000
Current Liabilities	£5,983,000	£6,642,000	£6,458,000	£8,312,000
Long Term Liabilities	£0	£0	£76,000	£26,000
Net Worth	£320,000	£2,192,000	£2,844,000	£3,487,000
Working Capital	-£537,000	£0	-£1,865,000	-£1,359,000
Profit per Employee	£100	£1,379	£435	£430
Sales per Employee	£12,931	£12,602	£13,226	£13,877