



Facilities Management Market *Research & Analysis UK 2010*

REPORT SAMPLE

**Facilities Management 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 Forecasts to 2013**

2nd Edition

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

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Companies Included

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

Estimates Provided

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

1. Introduction to *Research & Analysis* Reports

1.1 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, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product / Service Mix – Current & Future**

This report identifies the key product or service sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **End User / Channel Mix – Current & Future**

The report identifies the key end use sectors or channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key end use sectors also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

1.2 Introduction to 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, opportunities and threats, this report provides a more solid foundation for basing strategic and operational marketing decisions.
- **End User / Channel Mix & Trends** – By providing historical, current and forecast shares by end user or channel for this market, the report provides an invaluable illustration of the key sectors that are currently driving demand and likely future prospects. Qualitative comment on key trends within these sectors based on input from the industry provides a more in-depth review of the market as well as illustrating the most likely future scenarios.

THE SUPPLIERS & INDUSTRY STRUCTURE

- **Industry Structure** – The report includes a detailed and quantitative review of the industry in terms of number of companies, share by turnover, mix by employees, geographical mix, share by age of companies, mix by recent sales performance, sales per employee, share by credit rating & mix by location type (e.g head office/branch etc).
- **Industry Trends 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 FACILITIES MANAGEMENT MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Facilities Management market comprises of a wide range of activities within a variety of public and private end use sectors. Valued at more than £85 billion in 2010, this report reviews the key market trends and influences for facilities management contractors and the implications of these for suppliers of equipment and materials to these contractors.

The Facilities Management market comprises of the following key market sectors, with this report reviewing and providing market share for each of these sectors since 2004, with forecasts to 2013:-

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

In addition to analysis of these sectors, the report also reviews market trends and shares accounted for by the key end use sectors since 2004, with forecasts to 2013. End use markets reviewed include:-

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

In early 2010, the UK FM market is currently valued at just under £90 billion in annualised terms, with sources indicating that most sectors are now experiencing more positive demand patterns, though pricing pressures remain keen in a number of key end use markets.

The UK facilities management market is estimated to have grown in value by around 9% and toward companies on their primary business.

Whilst the sources in order to reduce in volume order to reduce in recent

In general the UK economy years. The described recession

One key source FM market complete around 60% typically a overall FM recent years are that to grow in the

Following research influences particular security, All of these companies increasing

As TFM companies single service target the opportunity use of organizations to develop

During 2008 greater in relationships and reduced specifically and equipment accountable for their own supply chains. These supplier improvement

Report Sample

ments, clients to seek initial decline services in highly common decline.

sectors of the last 2 years therefore be deep

encies in the which offer a related to be companies reduction in shed in Indications continue to

secondary market industry, migration, in issues. of FM training or

market, smaller firms and the further are making at Agencies

driven by a efficiencies programmes material principles and

programmes vary in scope, though typically include audits in relation to CRM and sustainability to which suppliers

The results of a wide range of audits identify weaknesses in purchasing and developing that in some cases efficient purchasing pressure

The UK Facilities operation present a challenge to grow sales

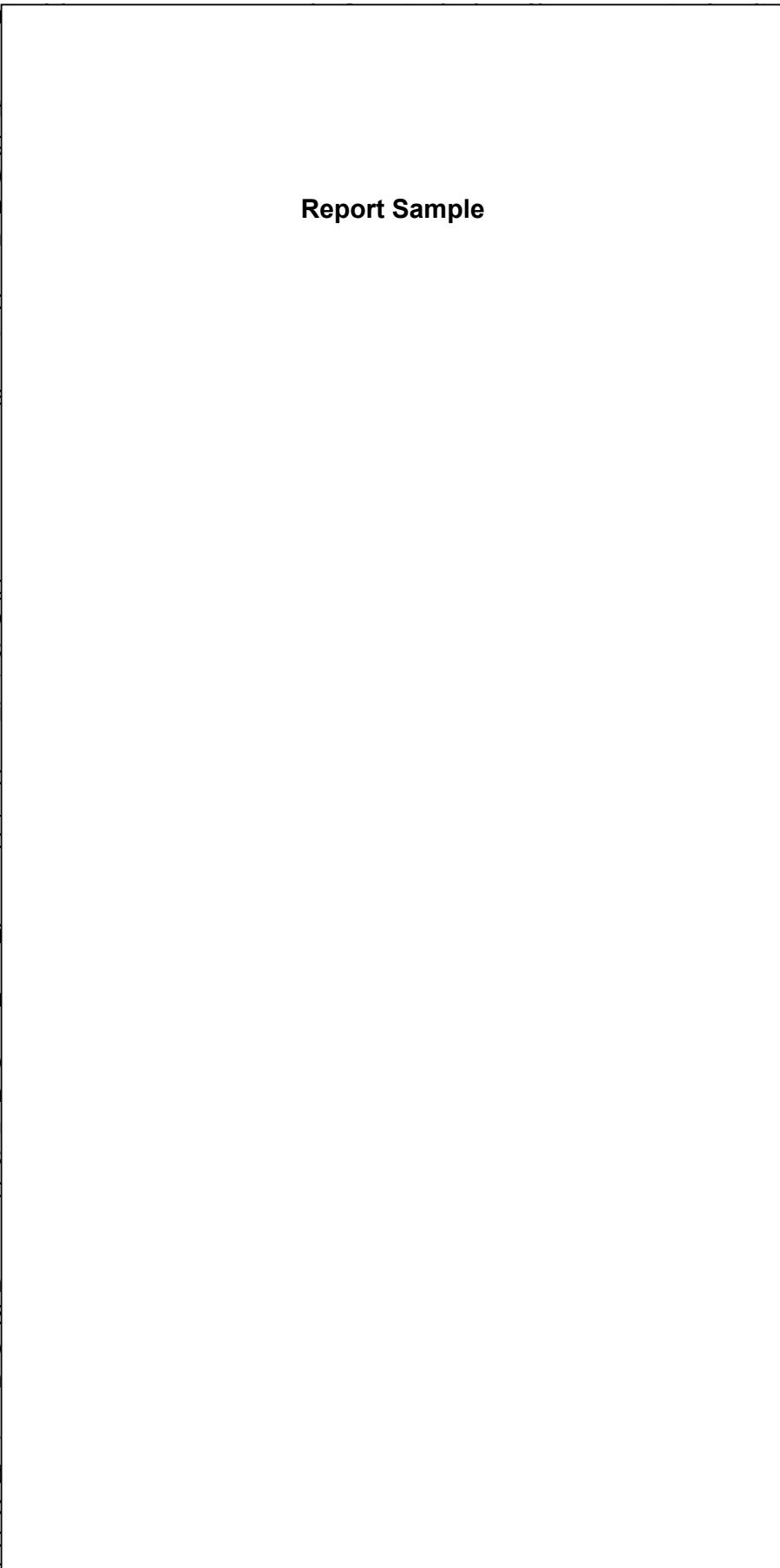
A greater buoyant growth outstrip of Manned services to security opportunities

Other sectors to continue minimal demand

Just over credit ratings standing. Management

In terms of the major offices and London is the Facilities North West

By the end of around £800m coupled with market in spending uncertain term, as the recent recession reduced purchasing a wide range of private end-use sectors.



has been ability to identify relationships and trends indicate of more progress further

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stantial share commercial population. different regions in islands,

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2.2 FACILITIES MANAGEMENT MARKET SIZE & TRENDS 2004-2013

2.2.1 Facilities Management Market Size 2004-2013 – Current Prices

The UK Facilities Management market encompasses a wide range of services and is estimated to be worth just under £xx billion in 2009 as illustrated in the following chart:-

Figure 1: Facilities Management Market – UK 2004 – 2013 By Value £m MSP



Source: MTW Research / Trade Estimates

The UK facilities management market is estimated to have grown in value by around 9% in 2009, as companies continue to invest in their primary business.

Between 2004 and 2009, the market has experienced significant increases in value, driven by inflation and overall market growth.

This healthy market has led to an increase in the volume of business, which has had a positive impact on the confidence of the industry.

Whilst growth has been strong, it is important to note that there is still some pricing pressure in the market, particularly in the service industry, which has led to a rapid increase in costs during Q4.

Nevertheless, the market remains strong, and it is expected that the number of key enterprises will continue to grow by a significant amount this year.

stimulus emanated from reasonable performance in the first half of the year with H2, 2008

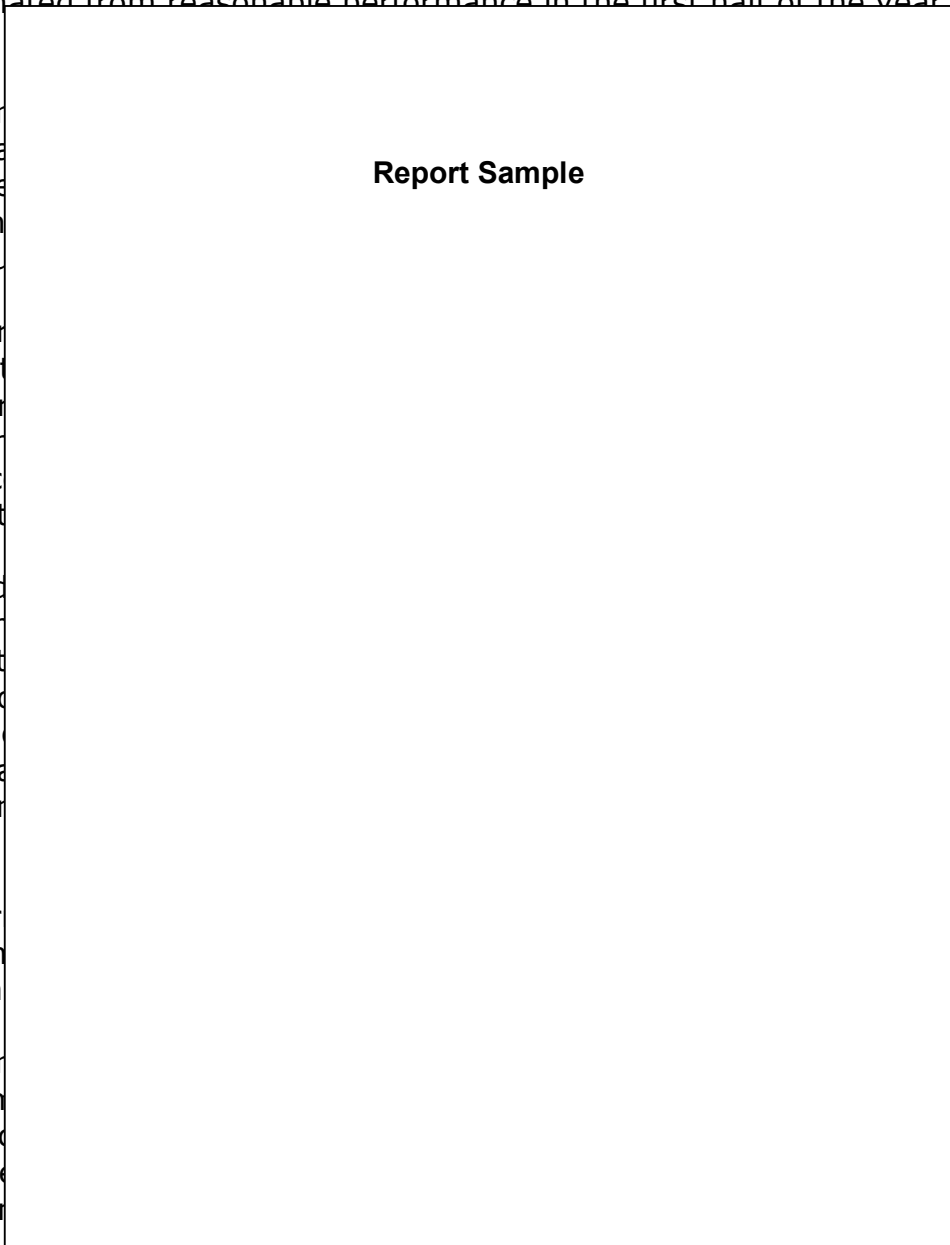
Contractions in most notably a which continued estimated to h growth of arou

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2.2.2 Facilities Management 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: Facilities Management Market – UK 2004 – 2013 Constant Prices £M



Source: MTW Research / Trade Estimates

As illustrated, based on constant 2004 prices, the Facilities Management market has declined from £79.5 billion in 2007 to £75.5 billion in 2013. During the FM purchasing.

The impact from multi-national clients and challenging limiting the industry program

Report Sample

inflation in FM industry's ability and price' in cost-saving

One key FM market estimate these companies provide has flourished prevalent services keen.

companies in the market, with and this sector vitality FM main

A wide range of development sector. development pressure reduce cost

the public companies to services and

addressing these broader challenges.

As TFM companies increasingly dominate the volume end of the market, smaller single service target the SME indicated to be who are indica Increasingly, T smaller and m as Business Lin penetrate this

As such, source more tradition companies are budgets and lo develop differ core compet in developi from TFM prov share of the U

In the longer t polarisation in increasingly fo economies of s 'specialist' app avoiding price

Price competit and one which indicate that o has declined r 2007. Whilst r downturn, indi clients seeking to their busine

Trade sources 2008 and 2009 With business anticipating an quickly in mid H2, 2010 and

During 2008 a from the publi underpinning t 2007, all local gains, whilst a use of FM serv

is a trend which is likely to continue in the medium to longer term.



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The FM market has also benefitted from additional spending by Central

Government to meet their public transport needs. Congestion has grown and the use of services for infrastructure industry in across the

Immigration to the FM market has raised security issues at centres. Some approaches provided full escorting n

The advent of current vacancies in provision in deep cleaning the FM market hospitals is £300 million cleaning services volume der

Trade sources to add value in 2010 and to toward the example is players in t than others offer enhanced trend in the with legisla

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2.2.3 Average FM Contractor Sales Revenue 2004-2013

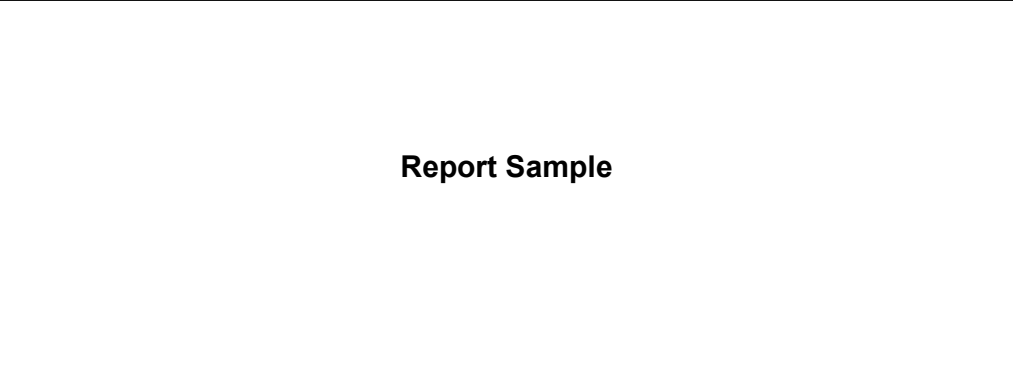
The following chart illustrates the average level of sales in the Facilities Management market since 2004 and forecasts to 2013:-

Figure 3: Average Sales in the Facilities Management Market – UK 2004 – 2013 £M



Source: MTW Research / Trade Estimates

The calculation of average sales in the FM sector is particularly difficult given the
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The Facilities Management market remains particularly fragmented at present, with a number of large players competing for work from sole traders and smaller contractors. The industry is increasingly seeking long-term contracts and is looking to diversify with other services, such as security and catering, to improve its overall performance. Many contractors are currently facing significant cost pressures. With cost containment a key priority, suppliers are under pressure to reduce prices. Source of revenue is becoming a key focus for companies, such as those in the public sector, who are looking to grow sales through new markets. With market consolidation expected in the last few years, companies are looking to acquire a preferred supplier status. Whilst some companies are looking to specialise in certain areas, others are looking to diversify on the basis of their core competencies. The issue of how to best manage the business is a key focus for companies, with many looking to add value through new services and products. Within the FM sector, there is a growing emphasis on time to market and cost efficiency. Two of the key success factors for FM companies are the ability to deliver high quality services and to manage risk effectively. Despite the current economic challenges, the FM sector is expected to continue to grow over the next few years. The industry is expected to continue to diversify and to seek long-term contracts. The industry is also expected to continue to diversify and to seek long-term contracts. The industry is also expected to continue to diversify and to seek long-term contracts.

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Future Prospects

By the end of this year, the overall FM market is expected to grow to a value of around expending This key public s



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framework for the use of outsourcing by the public sector. The review's key conclusions revolved around the following key points:-

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public sector in the longer term. The review identifies five key work streams where office and IT funding will be needed to support the strategic agenda and the public sector to deliver better services. In terms of rising costs, rising energy and management approaches are needed to be able to respond to rising prison costs. The demand for rapid response to present and expected population growth, additional services and the FM sector's dependence on the transport system will take a significant toll. Climate change will become a major requirement from infrastructure councils to collect and manage waste. The review identifies five key work streams where office and IT funding will be needed to support the strategic agenda and the public sector to deliver better services. In terms of rising costs, rising energy and management approaches are needed to be able to respond to rising prison costs. The demand for rapid response to present and expected population growth, additional services and the FM sector's dependence on the transport system will take a significant toll. Climate change will become a major requirement from infrastructure councils to collect and manage waste.

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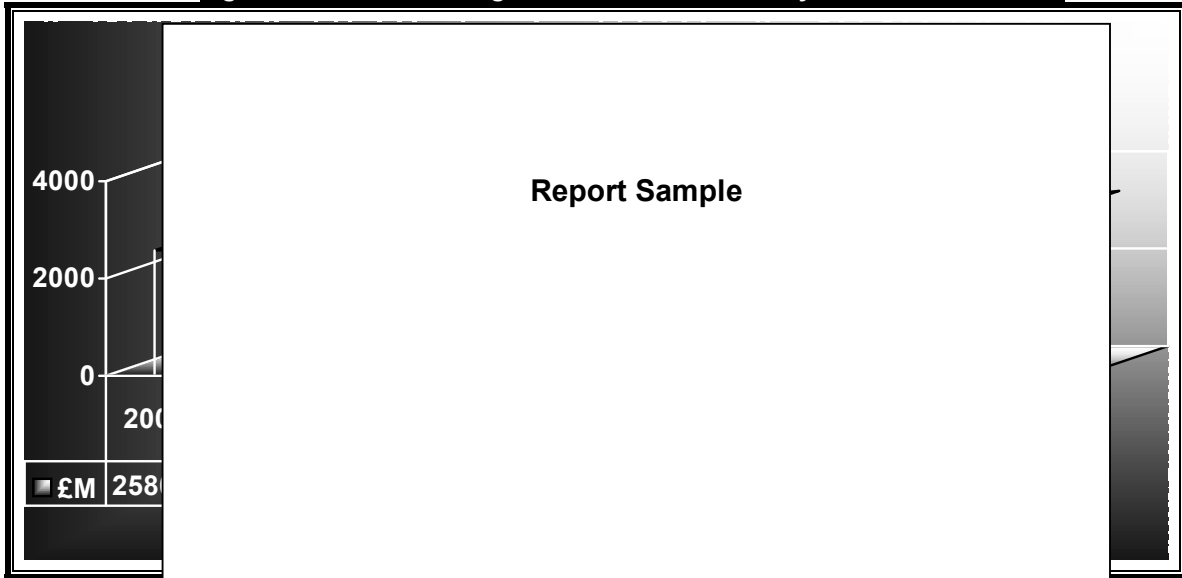
2.3 KEY MARKET TRENDS IN THE FACILITIES MANAGEMENT MARKET

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

2.3.1 Facilities Management Industry Profitability 2004-2013

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

Figure 4: Facilities Management Market Profitability – UK 2004 – 2013 £M



Profitability under £2. 2004 and from a number of markets. on stream part due to labour int

As illustrated wages paid that during unwilling been a key labour cost pricing pressure 2010.

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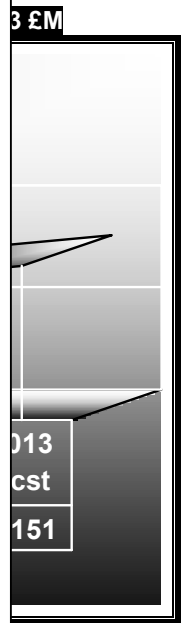
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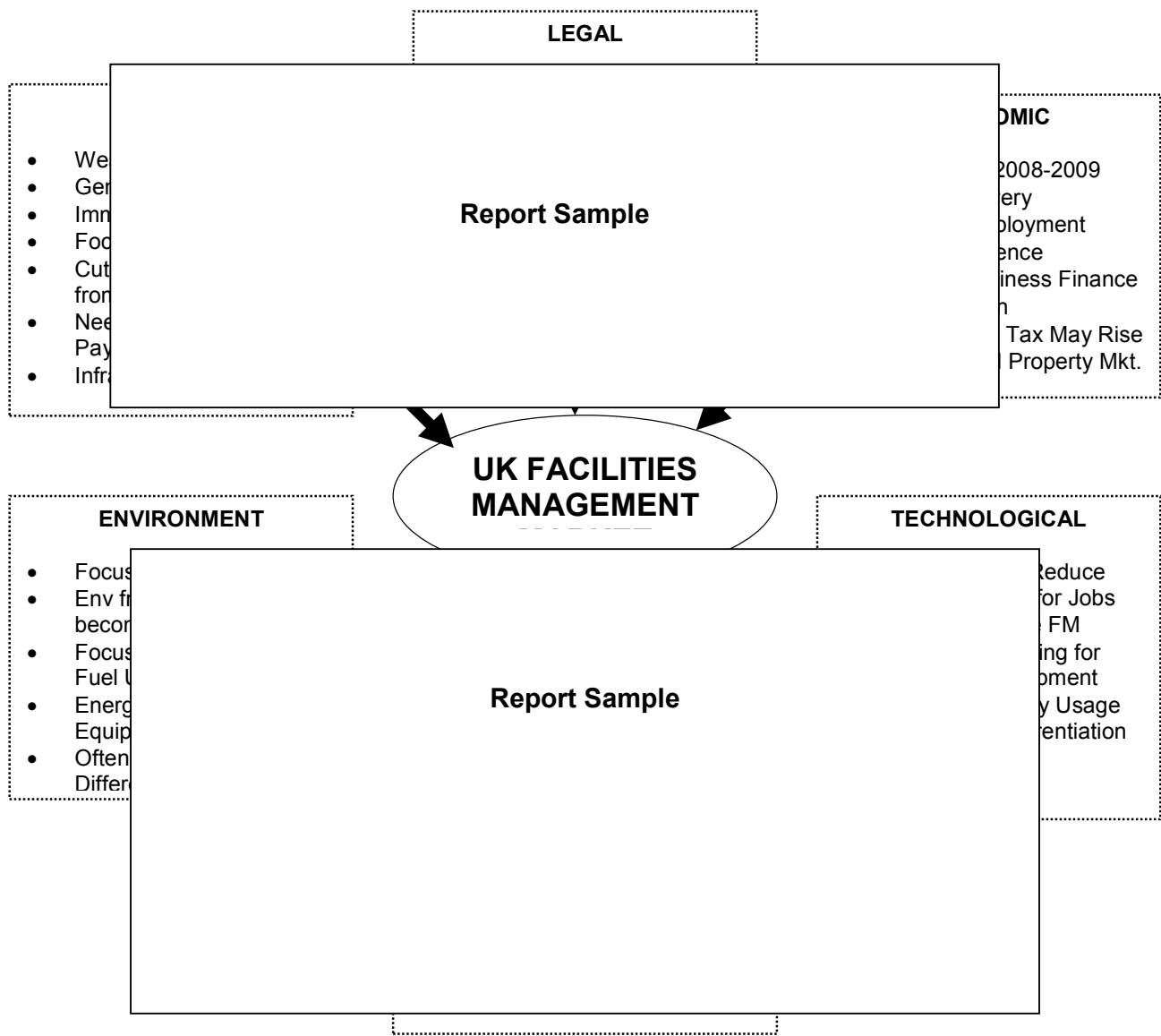
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2.4 KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

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 Facilities Management market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 13: PEST Analysis for UK Facilities Management Market in 2009



Source: MTW Research Strategic Review 2010

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.4.2 Political & Legal Influences & Trends

The current UK political landscape is presently determined by the results of the last general election. The Conservative Party was the largest party and returned to power. However, the Labour Party's performance was significantly weaker than in the previous election.

This has led to a period of political uncertainty and a focus on economic recovery. The Conservative Party's mandate is being tested by the challenges of the global financial crisis. The Labour Party's performance in the current election was a reflection of the public's desire for a change in government.

Current government policies are being reviewed in light of the economic challenges. The Conservative Party's political strategy is being reassessed. The Labour Party's political strategy is also being reviewed. The current political climate is one of uncertainty and change.

Within the current political landscape, there is a focus on economic recovery and job creation. The Conservative Party's mandate is being tested by the challenges of the global financial crisis. The Labour Party's performance in the current election was a reflection of the public's desire for a change in government.

In the current political landscape, there is a focus on economic recovery and job creation. The Conservative Party's mandate is being tested by the challenges of the global financial crisis. The Labour Party's performance in the current election was a reflection of the public's desire for a change in government.

One of the key challenges facing the current government is the need to address the economic challenges. The Conservative Party's political strategy is being reassessed. The Labour Party's political strategy is also being reviewed. The current political climate is one of uncertainty and change.

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2.4.3 Economic Influences & Trends

To the surprise of many commentators, the UK economy remained in recession during the third quarter of 2009 according to the UK government statistical office. With many anticipating some minimal growth in GDP output, this news further dampened business confidence in many sectors of the UK economy, particularly within the financial markets.

Gross Domestic Product 2004-2013

The following chart illustrates the current and future prospects for the UK economy in terms of GDP growth at current prices:-

2.4.4 SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

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

Figure 18: Key Strengths & Weaknesses in the Facilities Management Market 2009-2013

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Long accurate facilities • High quality • Wide market • Most business accounts • Acknowledged opportunities • Control the industry • High around experience • Market spend education • 80% • Major establishments • Efficiently used margins • Economical the last profitable • Under order • More 'excellent' 	<p style="text-align: center;">Report Sample</p> <p>in FM contracts which are... of FM result in high... re price... rom... ion... dent by... dustry... pecialist... exodus of... n home... s of price... y affected... s & pubs... nds at less... tion for... arded as a... ther than a... itive.</p>

Source: MTW Research Strategic Review 2009

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

Figure 19: Key Opportunites & Threats in the Facilities Management Market 2009-2013

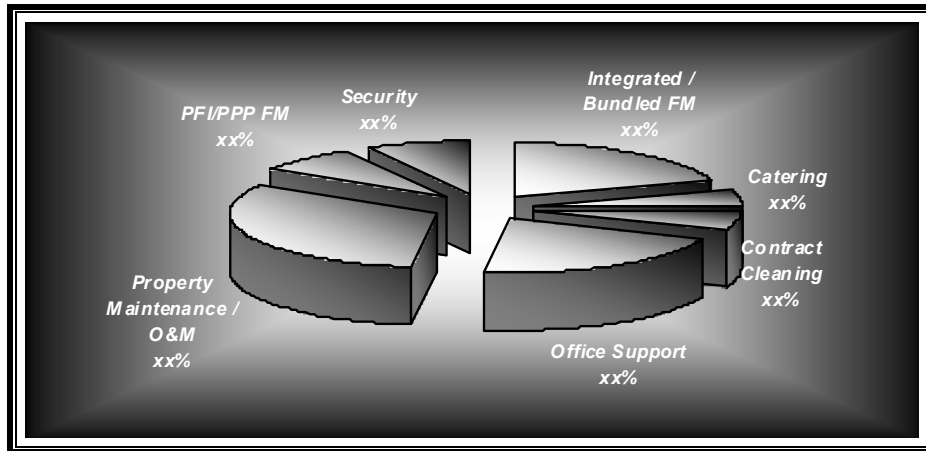
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Global efficiency & new • Need use of • Both efficiency • FM service costs • Outsourcing and a • Local whilst rises • Rising defer • Rising • Consumption advis • Education Fram & loc • Transition in UK public • Available reses • Use of delive • Use of techn • Subst oppo • Large purch purch • More 	<p style="text-align: center; font-weight: bold; font-size: 1.2em;">Report Sample</p> <p>er gets and resource. or available ts PFI debt books if . economic de those ent policy safety etc s power from arket 010. mand in ly to reign e likely to e next 6-12 main he urchasing ice.</p>

2.5 FACILITIES MANAGEMENT PRODUCT / SERVICE MIX

2.5.1 Share by Facilities Management Sector 2004, 2009 & 2013

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

Figure 20: Share by Key Product Sector in Facilities Management Market 2009



Source: MTW Research / Trade Sources

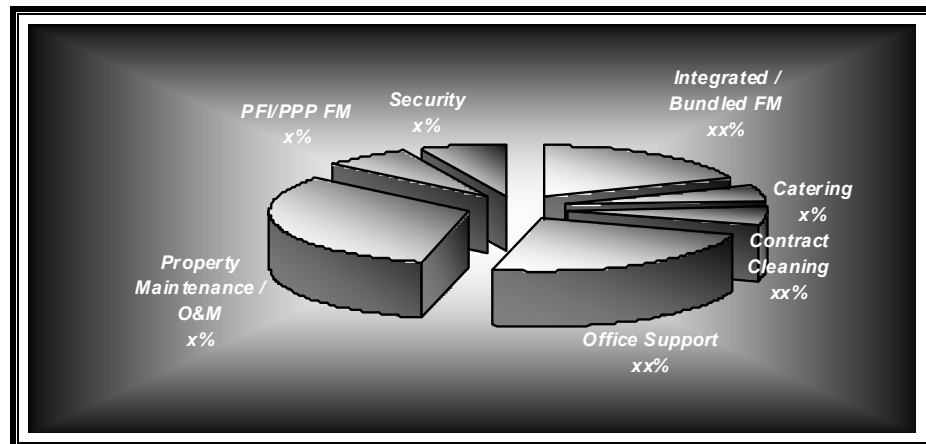
As the above chart illustrates, the UK Facilities Management market remains with this in c... 7 billion

The FM and 'bundled' in 2009



For comparison, the following chart illustrates the historical mix by value for each of the key sectors in 2004:-

Figure 21: Historical Share by Key Sector in Facilities Management Market 2004



Source: MTW Research / Trade Sources

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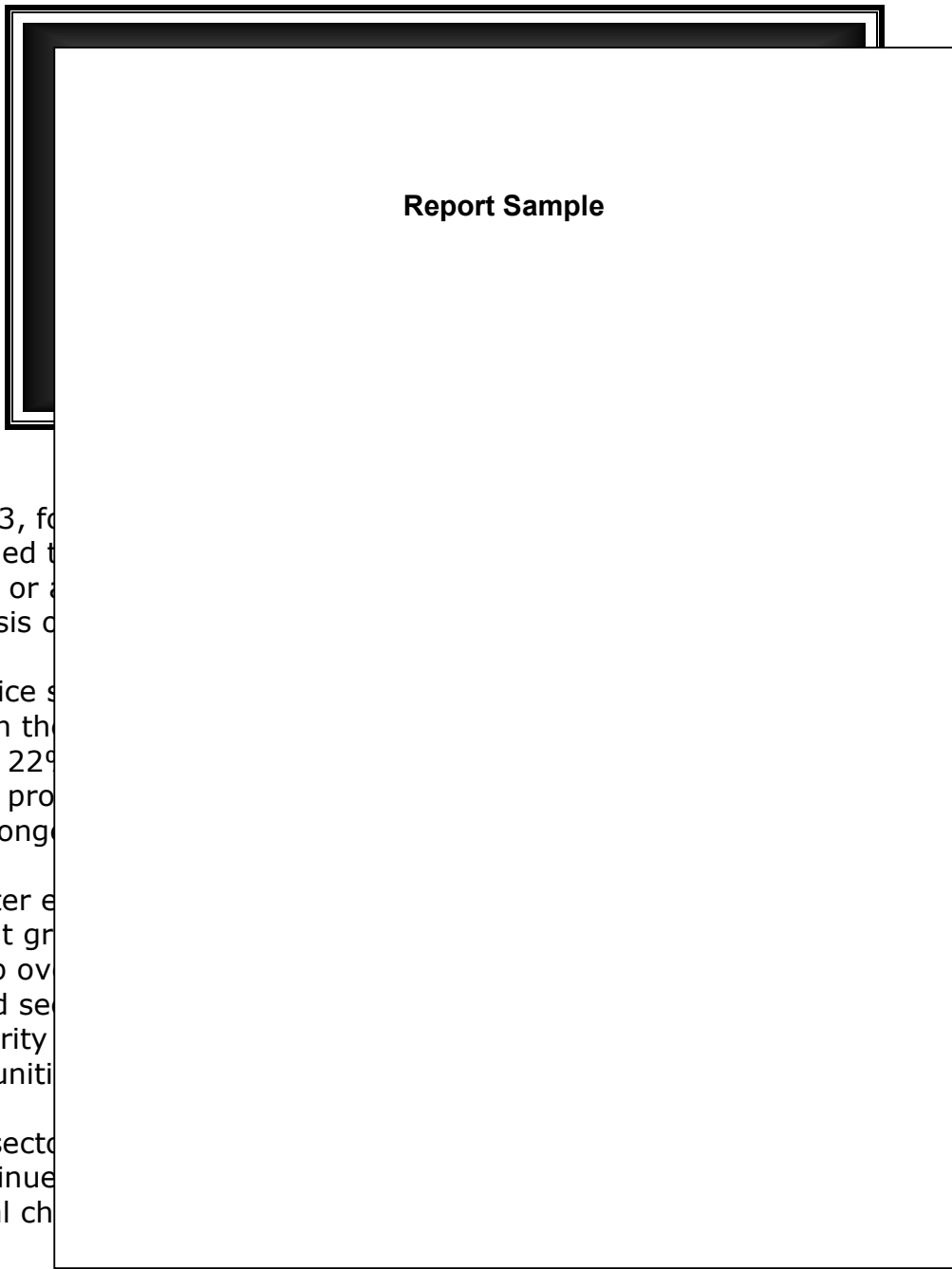


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In terms of future prospects, the following chart illustrates our forecasts of the likely share for each sector in 2013:-

Figure 22: Forecast Share by Key Sector in Facilities Management Market 2013



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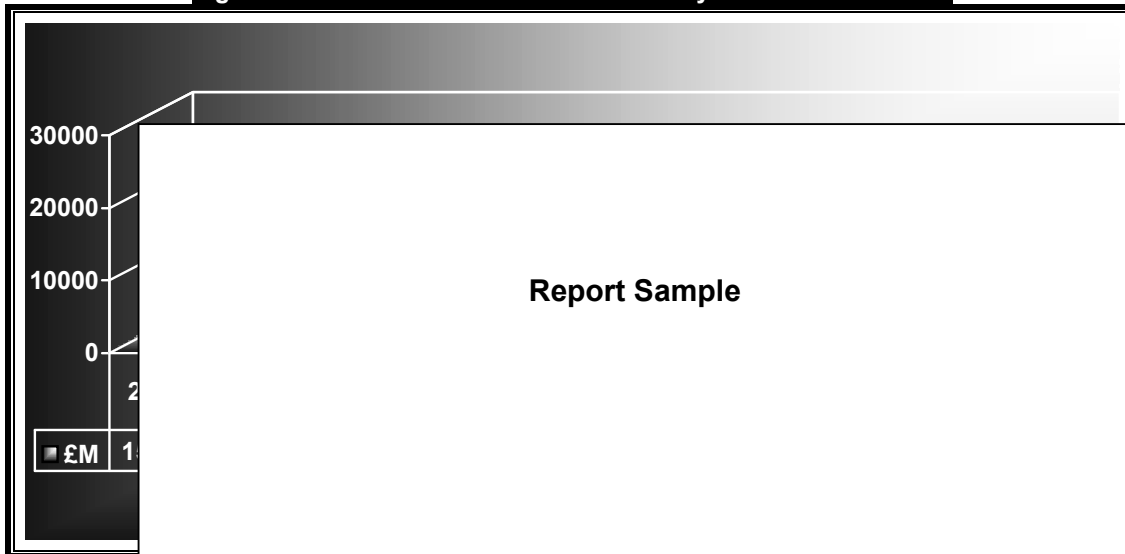
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2.5.2 Integrated FM / TFM Services Market Value 2004-2013

The following chart illustrates the performance of the 'bundled' FM sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: 'Bundled' FM Services Market by Value 2004-2013 £M



The 'bundled' FM sector is also referred to as 'integrated FM' and comprises of FM companies and providers.

To year end estimates indicate that the market is expected to grow due to the increasing demand for service providers.

The need for integrated FM budgets is expected to increase in medium to long term as more organizations integrate their FM services, valued at £21.2 billion by 2013.

The TFM market is expected to grow with DBFO contracts and other contract services.

Many of the players in the background management services market are service providers and competitors.

estimates

and is expected to be of value to service providers.

resources are being used for the purpose of the study.

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the market is expected to reach £21.2 billion by 2013.

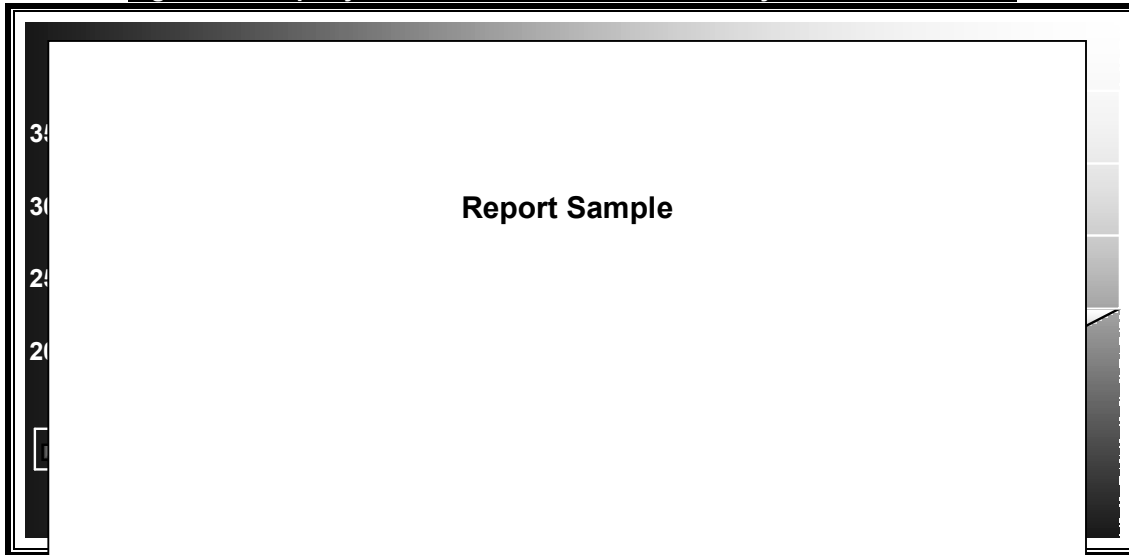
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2.5.3 Property Maintenance / O&M Market Value 2004-2013

The following chart illustrates the performance of the property maintenance and O&M sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 24: Property Maintenance & O&M FM Market by Value 2004-2013 £M



The market has experienced a period of growth in the past few years (reportedly 2004-2007) and is projected to continue to grow.

This growth is driven by a number of factors, including the increasing demand for facilities management services from both public and private sector organizations.

The market is expected to continue to grow over the next few years, driven by a number of factors, including the increasing demand for facilities management services from both public and private sector organizations.

By 2013, the market is expected to be worth around £30 billion, up from around £20 billion in 2004.

Estimates

The UK FM market is expected to grow from around £20 billion in 2004 to around £30 billion in 2013. This growth is driven by a number of factors, including the increasing demand for facilities management services from both public and private sector organizations.

to year growth is expected to be around 5% and is driven by a number of factors, including the increasing demand for facilities management services from both public and private sector organizations.

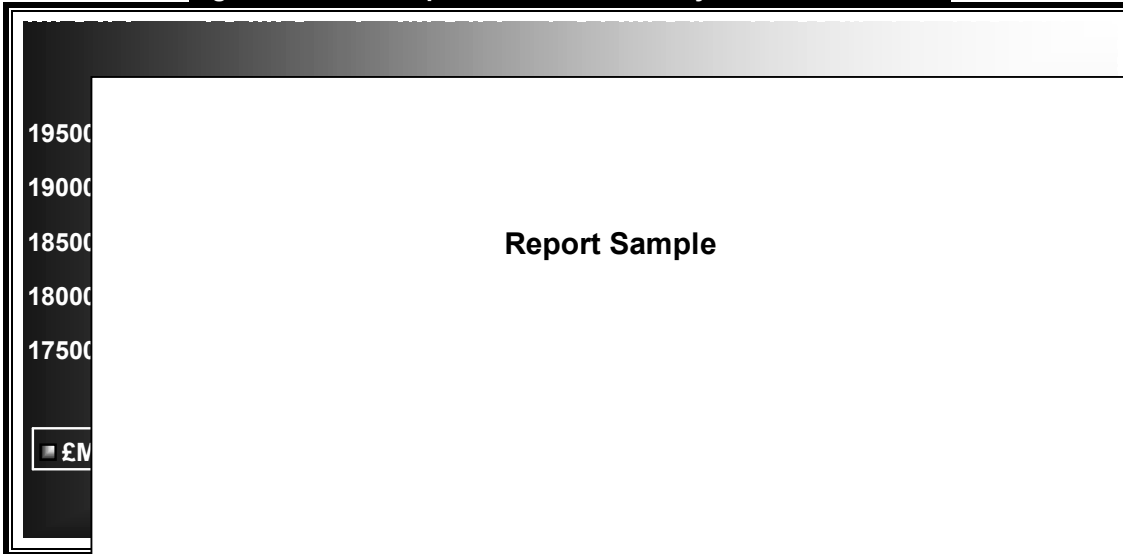
The market is expected to continue to grow over the next few years, driven by a number of factors, including the increasing demand for facilities management services from both public and private sector organizations.

he market is expected to be worth around £30 billion in 2013, up from around £20 billion in 2004.

2.5.4 Office Support Services Market Value 2004-2013

The following chart illustrates the performance of the office support services sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 25: Office Support Services Market by Value 2004-2013 £M



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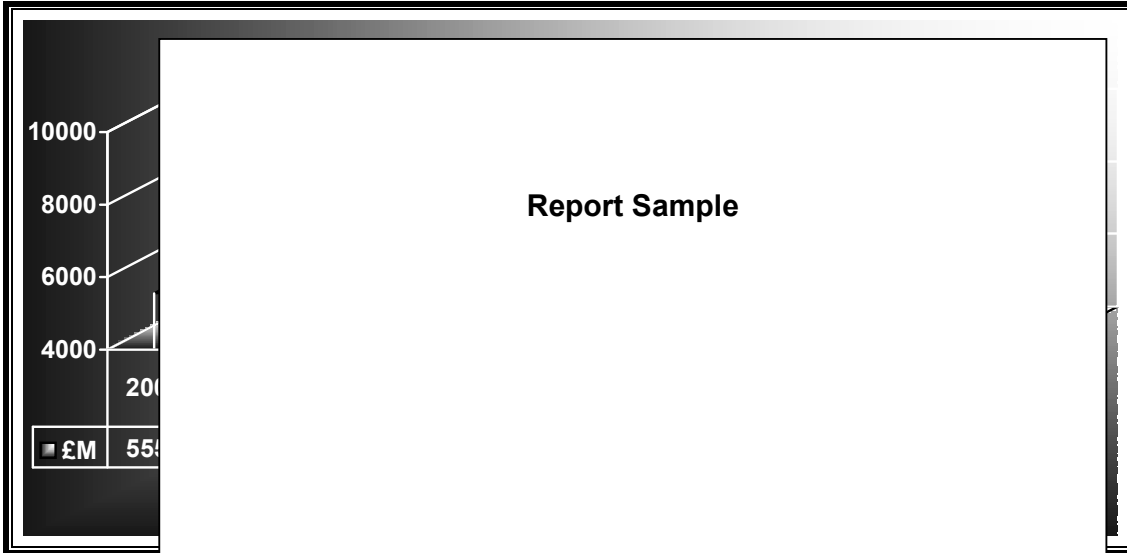
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2.5.5 Security & Access Control Services Market Value 2004-2013

The following chart illustrates the performance of the security services FM sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: Security Services Market by Value 2004-2013 £M



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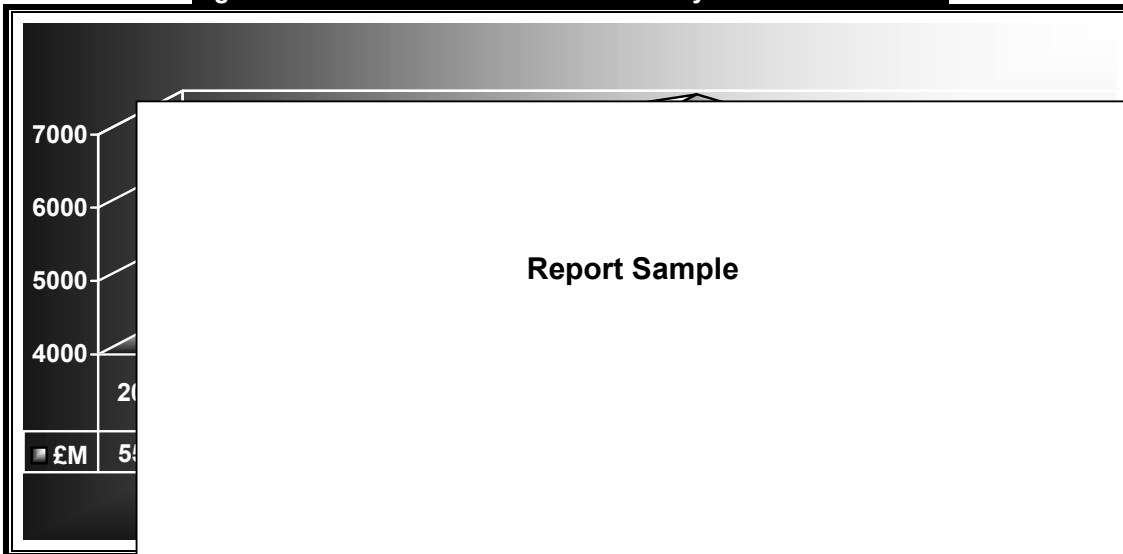
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2.5.6 PFI / PPP Facilities Management Market Value 2004-2013

The following chart illustrates the performance of the PFI / PPP FM sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: PPP / PFI FM Services Market by Value 2004-2013 £M



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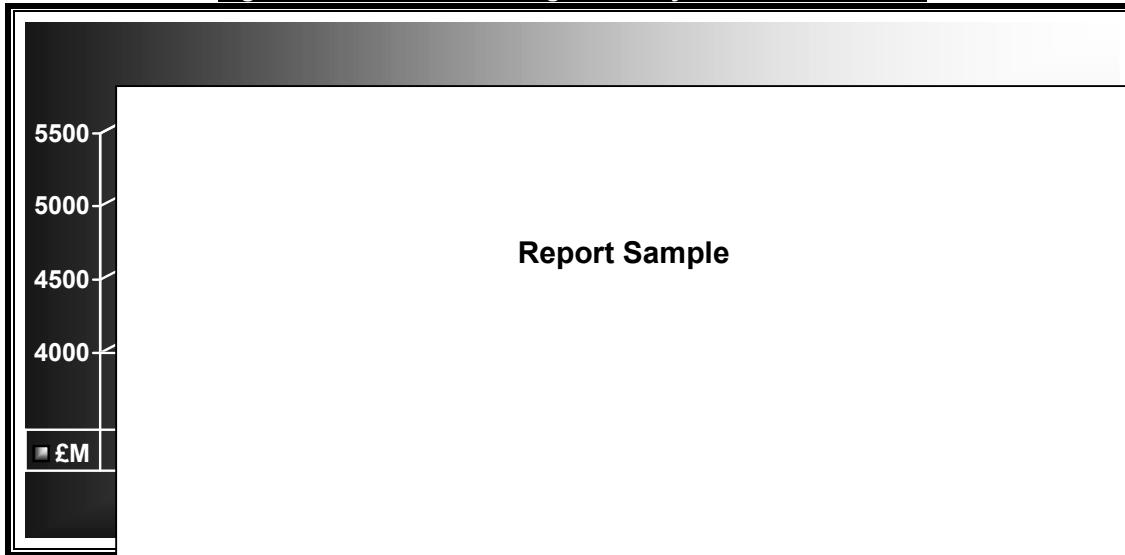
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ssion. £6.7

2.5.7 Contract Cleaning Market Value 2004-2013

The following chart illustrates the performance of the Contract Cleaning sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: Contract Cleaning Market by Value 2004-2013 £M



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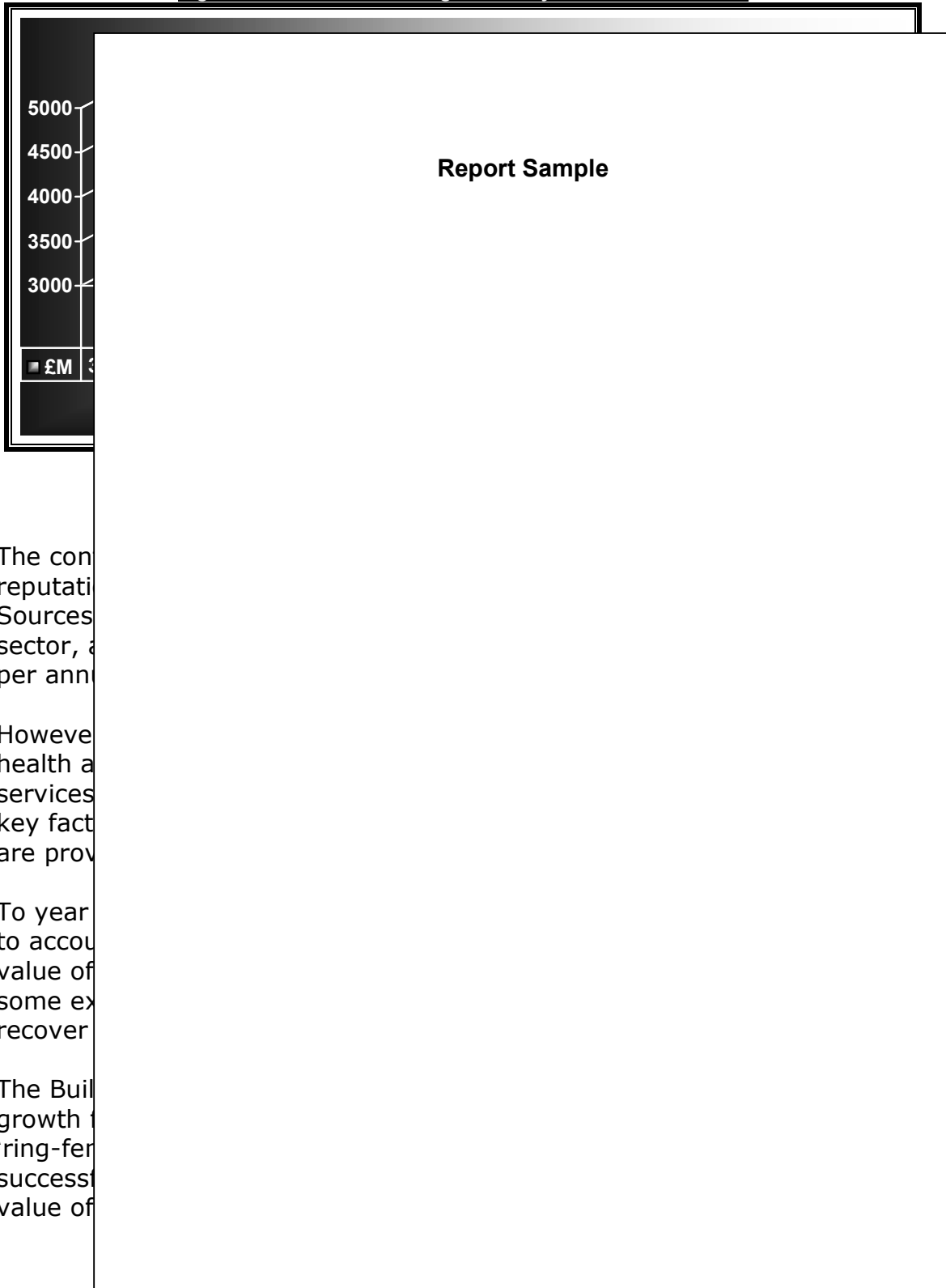
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2.5.8 Contract Catering Market Value 2004-2013

The following chart illustrates the performance of the Contract Catering sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: Contract Catering Market by Value 2004-2013 £M



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2.6 FACILITIES MANAGEMENT END USER / CHANNEL MIX

The following section identifies the key end use target markets for the UK Facilities Management industry and provides an illustration of historical market share in 2004, current share for 2009 and provides a forecast share for 2013.

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

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

The following table illustrates our estimates of the current share accounted for by these sectors in 2009 by value:-

Figure 26: Share by Key End Use Sector in Facilities Management Market 2009



Research / Trade Sources

It should be noted that there is some overlap between the sectors above in terms of estimates and guideline figures.

As the above chart shows, the largest key client sectors are followed by the manufacturing and technology sectors which combined have been boosted in recent years by the Private Finance

Spending on FM by the largest key customer groups is 9% and 8% respectively. The largest groups fall within the manufacturing and technology sectors for similar shares.

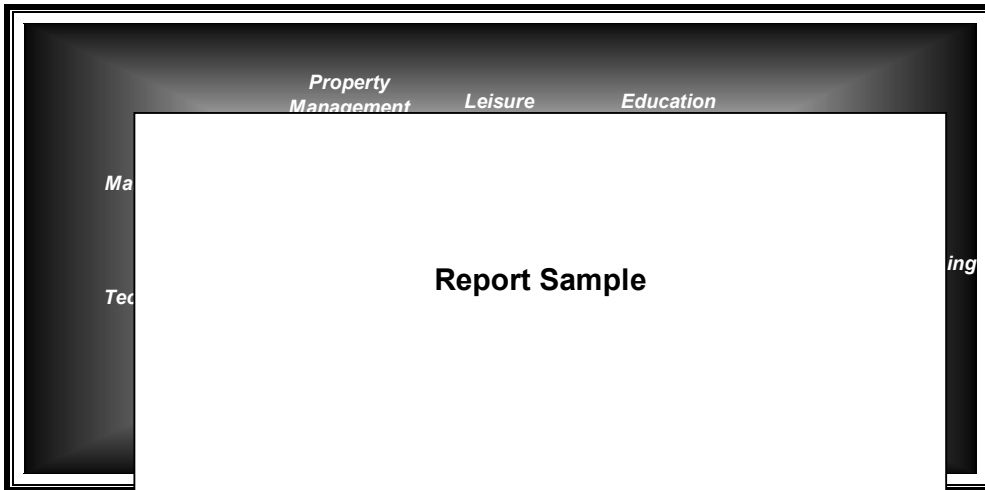
The definition of the sectors above shows some overlap between the sectors and complexities in the market are regarded as

The chart represents the current market share, closely reflecting the market structure which has been developed and in particular

The chart also accounts for the largest client groups which account

In order to provide a comparison, the following chart illustrates the key sectors' estimated share of the Facilities Management market in 2004:-

Figure 27: Historical Share by Key End Use Sector in Facilities Management Market 2004



... / Trade Sources

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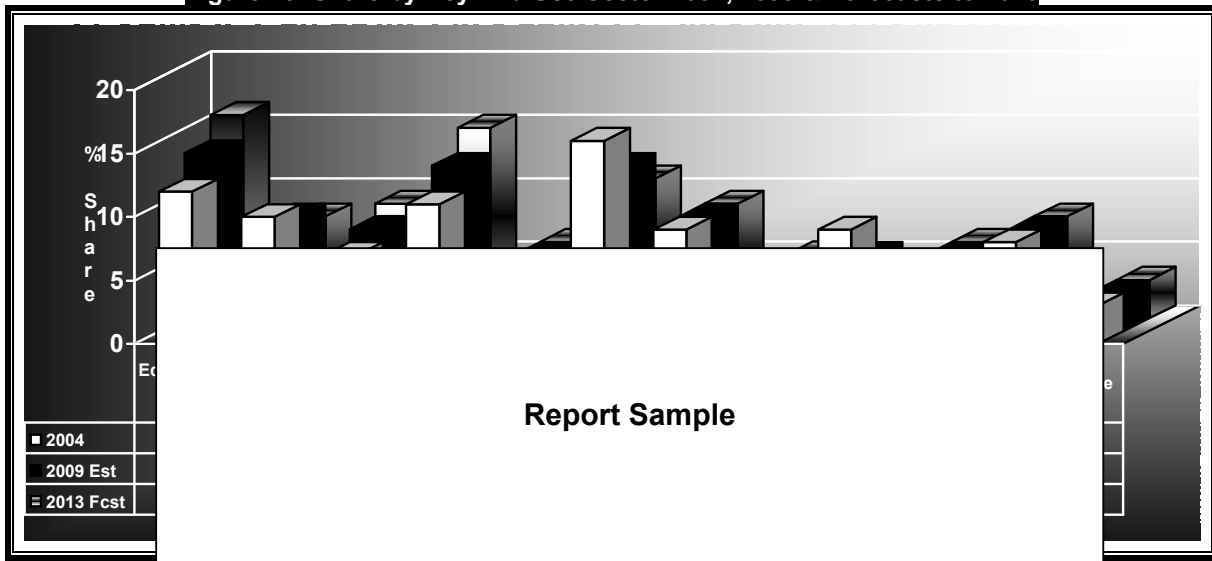
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around volume

Report Sample

The following chart illustrates the historical and current shares of each of the key end use sectors, and provides a forecast share for each in 2013:-

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



Source: MTW Research / Trade Estimates

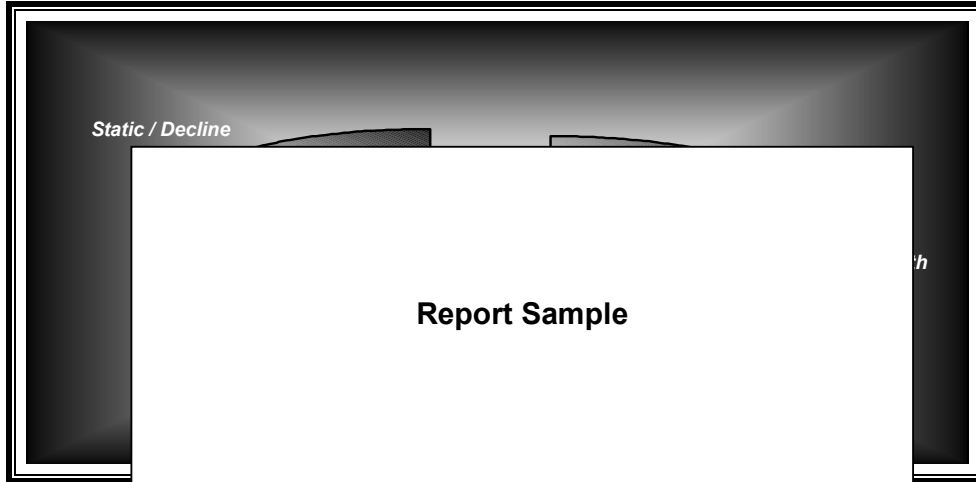
3. THE FACILITIES MANAGEMENT INDUSTRY

3.1 Facilities Management Industry Structure in 2010

3.2.1 Industry Mix by Growth/Decline Over Last 12 Months

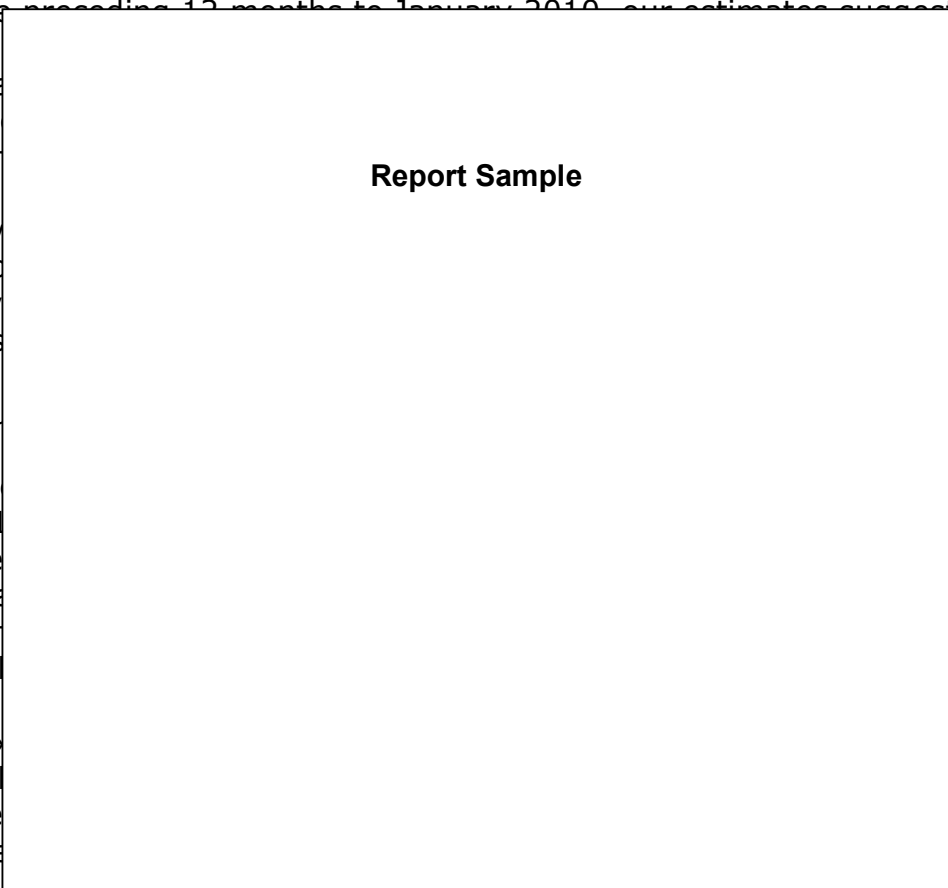
The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 29: Market Share by Facilities Management Company Sales Growth / Decline 2009



Source: MTW Research / Company Accounts

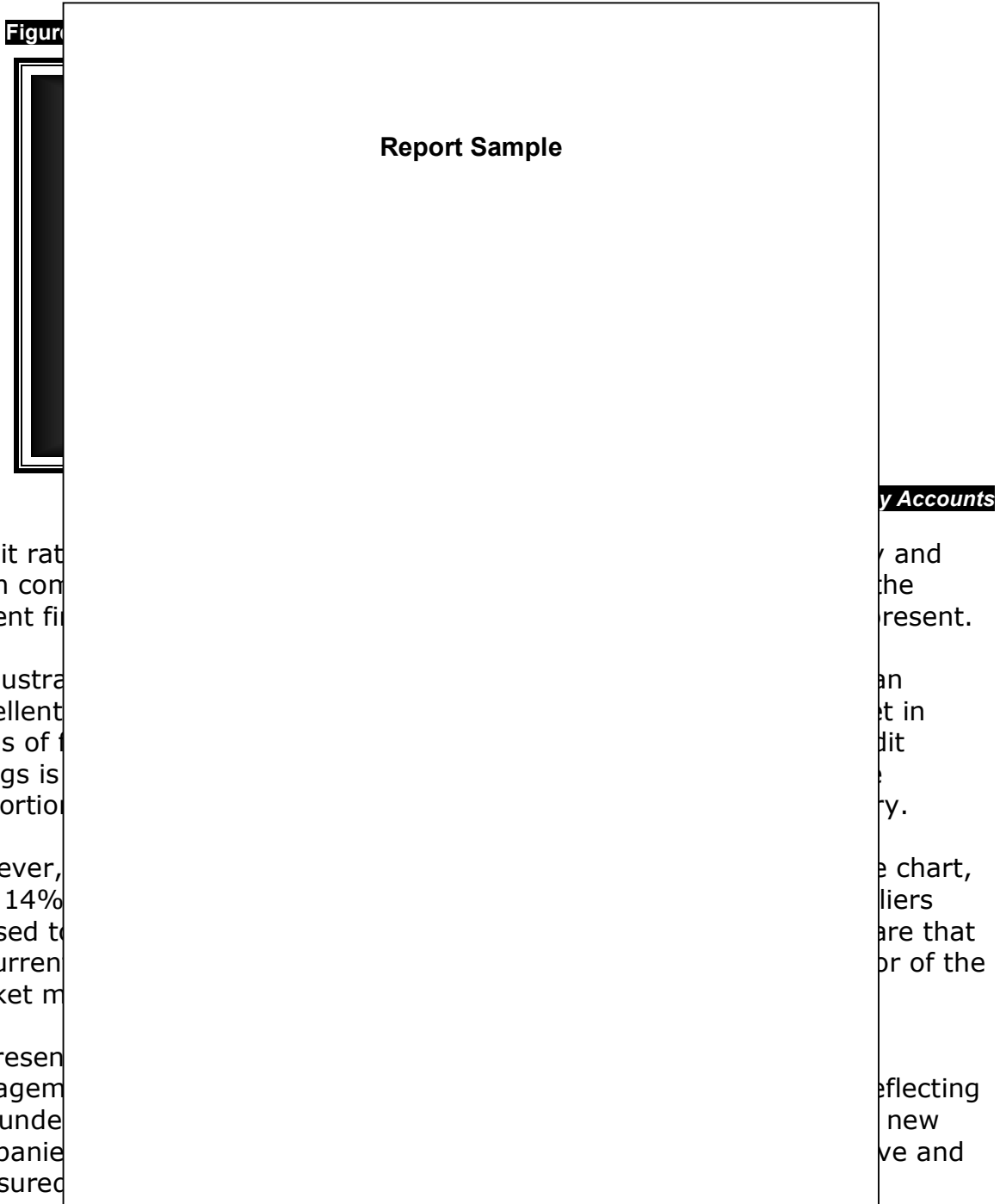
For the preceding 12 months to January 2010, our estimates suggest that more than 5% of companies reported a decline in sales, with some reporting a decline in sales of up to 10%. Facilities Management sales growth was positive in 2009, however sales of some companies were negative, necessitating a reduction in sales. One source has reported that in the last 12 months, the average turnover of trade was just £1 million, whilst there was a healthy growth in sales. Approximate overall sales for this sector declined



that more than 5% of the sales market grew superficially, which may not be reflected in the last 12 months. The turnover of trade was just £1 million, whilst there was a healthy growth in sales. Approximate overall sales for this sector declined

3.2.2 Industry Share by Credit Rating in 2010

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for by Facilities Management companies in terms of credit rating in January 2010:-



3.2.3 Industry Mix by Age of Companies in 2010

The following chart illustrates the share by age of companies within the UK Facilities Management market as at January 2010:-

4. FACILITIES MANAGEMENT COMPANY RANKINGS

4.1 Facilities Management Companies Listing

The list below illustrates the key players reviewed in this section:-

Figure 36: Facilities Management Company Listing

Accuro FM	Facility Project Management	OCS Group UK
Acme Facilities Management Manchester	FES FM	Operon
Active Facilities Management	First Services Facilities Management	Outshine Facilities Management
Acuity Management Solutions	Forward Facilities Management	Outsource Specialists
Amec Group	G & S Facilities Management	P S Facilities Management
Amey UK Plc	G S H Group Plc	Parsons Brinckerhoff
Andron Contract Services	Gardiner & Theobald Facilities Management	Peter Howell Facilities
Aramark	Global House	Phosters Fs
Arneil & Johnston	G4S Regional Management	Plan B Solutions
Asm Facilities	Globe Facilities	Product Procurement Services
Awg Group	Guardian Consultancy Services	Promanex Group
Axcess Solutions	Balfour Beatty PLC (Haden Young & Haden Building)	Q F S L Cleaning
B.B.M Contracts	Hardy Landscape Management	Quadron Services
Babcock Dyncorp	Haven Engineering Services	Quality Assured Facility Services
Babcock International Group Plc	Haywards 2008	Quality Performance Management
Babcock Support Services	BAM Construct UK	RFM Group Services
Best Fit Business Solutions	Henry Boot Management	Reliable Maintenance
Capita Group Plc	Hillyard Associates	Reliance Security Group
Carillion (Am) Limited	Hochtief Facility Management UK	Rentokil Initial Facilities Services
Carisway	Hiro Facilities Management	Return Logistics
Chartwell Facilities Management	Hs Facilities Management	Risk Facility Management
Clarke Chapman	Ice White	Robertson Facilities Management
Clean Supreme	Inhouse Corporate Services	Rollright Facilities
CMS Group	Integrated FM	Romec
Cofathec Heatsave	Interactive Facilities Management	Safetynet Solutions
Collsec Facility Services	Interserve (Facilities Management)	Serco Group Plc
Compass Group	Interserve Plc	Skanska Rashleigh Weatherfoil
Courier Facilities	Inviron Limited	Sodexo Holdings
Cross Services Engineering	IPM Facilities	Spencer Cox & Partners
Dalkia Plc	ISS Facility Services	Staveley Industries
Derek Smith Electrical	J J & B Projects	T F M S
Dove Services	J P B Property Holdings	Taylor Ridgway International
SGMS Group	Jarvis Accommodation Services	Terwyn
Eagle Facility Management Services	Johnson Controls	The Centre For Facilities Consultancy
Ecovert FM	JXB	Thomson FM
EFM Facilities	Kellogg Brown & Root	Triguard
Elite Hygiene	Kier Support Services	Turner Estate Solutions
Elite Services Environmental	Level Facilities Management	Tynewater Property Management
Emcor Group UK	Maclellan International	Vega Facilities Services
Engineering Support Services (ESS)	Mailsources UK	VFM Consultancy
Enigma FMA	Manchester Jetline	Victoria House
Enviro-Waste Limited	Matthew Watts Associates	Vinci PLC
Europa Support Services	Mitie Facilities Services	Vogue Facilities Management
Estate Facilities Consultancy	Monitor Facilities Management	Watson Lennard & Payne
Exact Corporation	Morrison PLC	Williams Facilities Management
F M. Support	Muller Professional Services	Workspace Solutions
Faceo FM UK	Neocrest Facilities Services	WS Atkins Plc
Facilities & Move Management	Network Resource Management	WSP UK
Facilities Solutions		ThyssenKrupp Services

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 Facilities Management Contractors Ranking By Turnover

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

Figure 37: Facilities Management Companies Ranked By Turnover 2009

1	C	Services
2	Se	
3	C	
4	M	Management
5	In	ment
6	Ba	
7	Ba	ment
8	W	ement
9	Vi	Management
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33	Ba	
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35	H	ultancy
36	G	
37	M	
38	G	
39	In	
40	Tu	gement
41	C	
42	Ba	
43	E	ers
44	Pr	
45	M	consultancy
46	Q	
47	E	es
48	Ja	
49	S	Management
50	Fa	

Source: MTW Research / Trade Sources

4.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2009:-

Figure 38: FM Companies Sales Estimates 2009

Trading Name	2009 Turnover	Trading Name	2009 Turnover
Col			£45.0
Ser			£40.0
Ca			£38.0
Mo			£35.0
Inte			£31.4
Bat			£25.0
BA			£22.0
WS			£20.0
Vin			£17.0
Ca			£15.0
Mit			£11.5
Am			£9.0
Asr			£8.0
Bal			£8.0
Axc			£4.5
Joh			£4.3
OC			£4.0
Arr			£3.9
Dal			£3.5
ISS			£3.5
Ara			£3.4
Kel			£2.8
G4			£2.6
Kie			£2.5
Aw			£2.5
Rel			£2.5
Soc			£2.4
Em			£2.3
Sk			£2.0
Mo			£1.8
WS			£1.8
Par			£1.5
Bat			£1.5
Rel			£1.5
He			£1.5
G S			£1.5
Ma			£1.4
Ga			£1.4
Ma			£1.4
Inv			£1.4
Tur			£1.3
Co			£1.3
Bat			£1.2
Ecc			£1.2
Pro			£1.0
Ma			£1.0
Qu			£0.8
Eur			£0.8
			£0.7

Trading Name	2009 Turnover	Trading Name	2009 Turnover
Ice			£0.2
IPN			£0.2
Ma			£0.2
Eng			£0.2
Gld			£0.2
Ha			£0.2
JXT			£0.1
Pet			£0.1
Ch			£0.1
Ris			£0.1
Ter			£0.1
Hir			£0.1
Lev			£0.1
Ou			£0.1
Qu			£0.1
Re			£0.1
Th			£0.1
Wa			£0.1
B.E			£0.1
Inte			£0.1
Inte			£0.1
Tyr			£0.1
Vo			£0.1
Ac			£0.1
Ma			£0.1
Do			£0.1
Fac			£0.1

Report Sample

Source: MTW Research / Trade Sources

4.3 FM Companies Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the FM providers in 2009:-

Figure 39: Facilities Management Companies Ranked By Profit 2009

1	C		
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7	E		ces
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11	M		
12	A		ing
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14	E		s
15	A		
16	S		tions
17	C		
18	A		nt
19	E		ces
20	I		
21	A		gement
22	H		
23	C		
24	H		
25	A		gement
26	F		
27	S		ces
28	E		
29	S		
30	M		
31	V		
32	F		
33	E		
34	F		
35	H		ment (Uk)
36	C		
37	M		
38	C		
39	M		
40	I		ent Services
41	C		
42	E		
43	E		
44	E		

90	Gu		ement Manchester
91	Ac		
92	St		gement
93	Eli		
94	Ou	Report Sample	
95	Ha		ment
96	Ice		
97	IP		
98	Ma		tional
99	Er		ions
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101	Ha		s
102	JX		
103	Pe		
104	Ch		ltancy
105	Ri		
106	Te		
107	Hi		
108	Le		Management
109	Ou		ement
110	Qu		anagement
111	Re		s
112	Th		
113	W		es Consultancy
114	B.		
115	Int		s
116	Int		
117	Ty		agement
118	Vc		

Source: MTW Research / Company Accounts

4.4 FM Companies Ranking by Assets

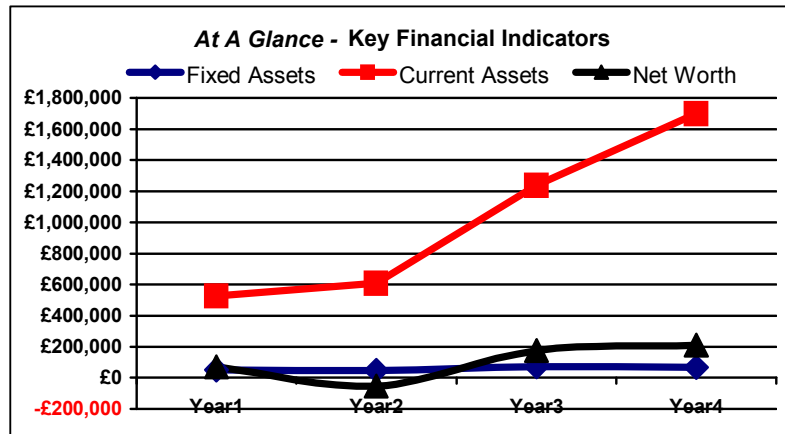
The following table illustrates our estimates of the rank by total fixed and current assets for each company in 2009:-

5. FM CONTRACTOR PROFILES & 'AT A GLANCE'

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

Sample Address
Sample Address
Sample Address
Tel: Sample

Sample Ltd is a private limited with share capital company, incorporated on January 4, 1999. The company's main activities are recorded by Companies House as "Facilities management, project management and consultancy." In early 2010, the company has an estimated 60-70 employees.



To year end 31/03/2008, Sample Ltd is estimated to have achieved a turnover of around £8.0 million. Pre-tax profit for the same period is estimated at around £0.4 million.

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

Company Name	Sample Ltd
Brief Description of Activities	Facilities management, project management and consultancy.
Parent Company	Sample HOLDINGS LTD.
Ultimate Holding Company	Sample PUBLIC LIMITED COMPANY (THE)
Estimated Number of Employees	60-70
Senior Decision Maker / Director	Sample

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

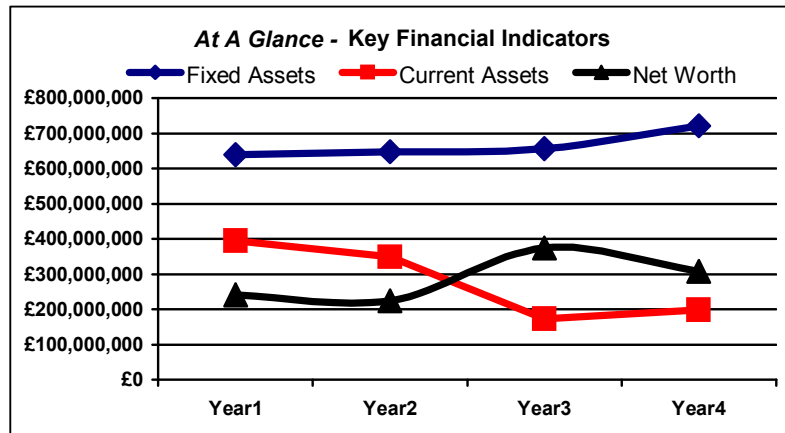
Sample Ltd - 4 Year KPIs to Year End 31/03/2008

Key Indicator £	Year End 31/03/2005 (Year1)	Year End 31/03/2006 (Year2)	Year End 31/03/2007 (Year3)	Year End 31/03/2008 (Year4)
Fixed Assets	£52,000	£48,000	£69,000	£66,000
Current Assets	£526,000	£610,000	£1,241,000	£1,698,000
Current Liabilities	£500,000	£708,000	£1,133,000	£1,554,000
Long Term Liabilities	£7,000	£2,000	£0	£0
Net Worth	£71,000	£-52,000	£177,000	£210,000
Working Capital	£26,000	£-98,000	£108,000	£144,000
Profit per Employee	£2,083	£-2,133	£719	£662
Sales per Employee	£59,542	£62,844	£84,719	£106,310

Sample Group Ltd - Company Overview & 'At a Glance'

Sample Address
Sample Address
Sample Address
Tel: Sample

Sample Group Ltd is a private limited with share capital company, incorporated on December 9, 2002. The company's main activities are recorded by Companies House as "Design capabilities, project management and constructions skills in the manufacturing, infrastructure and process industries and provision of services to oil and gas, utilities and electric services." In early 2010, the company has an estimated 6526 employees.



To year end 31/12/2008, Sample Group Ltd is estimated to have achieved a turnover of around £941.0 million. Pre-tax profit for the same period is estimated at around £43.6 million.

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

Company Name	Sample Group Ltd
Brief Description of Activities	Design capabilities, project management and constructions skills in the manufacturing, infrastructure and process industries and provision of services to oil and gas, utilities and electric services.
Parent Company	Sample PLC
Ultimate Holding Company	Sample PLC
Estimated Number of Employees	6526
Senior Decision Maker / Director	Sample Sample

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

Sample Group Ltd - 4 Year KPIs to Year End 31/12/2008

Key Indicator £	Year End 31/12/2005 (Year1)	Year End 31/12/2006 (Year2)	Year End 31/12/2007 (Year3)	Year End 31/12/2008 (Year4)
Fixed Assets	£639,441,000	£648,564,000	£656,191,000	£720,841,000
Current Assets	£394,545,000	£348,100,000	£171,948,000	£198,717,000
Current Liabilities	£515,744,000	£515,523,000	£223,297,000	£230,246,000
Long Term Liabilities	£277,993,000	£257,333,000	£229,872,000	£382,348,000
Net Worth	£240,249,000	£223,808,000	£374,970,000	£306,964,000
Working Capital	-£121,199,000	-£167,423,000	-£51,349,000	-£31,529,000
Profit per Employee	-£6,582	-£2,793	£20,532	£1,739
Sales per Employee	£149,257	£159,550	£136,770	£144,256