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Contract Cleaning Services

Industry Study with Forecasts for 2016 & 2021

Study #2886 | May 2012 | \$4900 | 286 pages



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Industry Study with Forecasts for 2016 & 2021

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Industry Study with Forecasts for 2016 & 2021



Growth in the number of households and businesses will aid revenue gains for US firms, as will a diversification by companies to offer a wider range of services at competitive prices.

US revenues to rise 4.8% annually through 2016

Revenues for contract commercial and residential cleaning services are forecast to advance 4.8 percent annually to \$68.3 billion in 2016. Growth will be driven by customers returning to more frequent cleaning schedules as the economy continues to improve, especially those who reduced their use of cleaning services in order to minimize expenses in response to the effects of the 2007-2009 recession. Gains will also be supported by faster growth in the number of households and a rebound in the number of business establishments. Furthermore, the recession motivated many cleaning companies to diversify and offer a wider range of services at more competitive prices, and the rising affordability and use of cleaning services will support revenue gains.

Outsourcing cleaning functions to cut costs in nonresidential markets

Nonresidential markets account for the vast majority of cleaning service revenues, making up almost 80 percent of the total in 2011. In addition, many companies that previously employed inhouse cleaning staff reduced operating expenses by outsourcing cleaning services as the economy worsened. Demand for cleaning services in the nonresidential market is more inelastic than in the residential market due to the sizable existing base of nonresidential

US Contract Cleaning Services
Demand by Type, 2011
(\$54.1 billion)

Floors & Fabrics
11%
Exterior Cleaning 4%
Others
11%

floor space and the need to keep this space clean. Due to the poor economic climate, nonresidential cleaning service revenue growth decelerated over the 2006-2011 period. Going forward, revenues will benefit from the continued trend of outsourcing cleaning functions to cut costs.

In the residential market, the increasing use of cleaning services by an aging population and the growing number of dual-income households will support revenue gains. Members of dual-income households often do not have the time or the inclination to perform cleaning tasks, and older citizens are sometimes incapable of performing cleaning tasks to the extent that they once did. These

trends, coupled with accelerating growth in personal disposable income levels, will benefit residential cleaning services.

Interior building cleaning to remain largest service

Interior building cleaning services are the largest contributor to cleaning service revenues, accounting for nearly 75% of the total in 2011. Growth in revenues will derive from expansions in the number of business establishments and the number of households, both of which will create more opportunities for interior cleaning services. Outsourcing as a means of reducing operating costs will continue to aid the use of contract interior cleaning services in nonresidential markets.

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Industry Study with Forecasts for 2016 & 2021



Sample Text, **Table & Chart**

TABLE V-5

CONTRACT CLEANING SERVICE REVENUES BY REGION (million dollars)

2001 2006 2011 2016 2021 Item

Population (millions) \$ services/capita

Nonresidential Floor Space (bil sq ft) \$ services/000 sq ft

Cleaning Services Northeast Midwest

> South West

SAMPLE TABLE

SERVICES

Individual Proprietorships -- Revenues earned by a interior cleaning service firms organized as individual propri

anticipated to grow enues will benefit p ize this segment of as individual propri 2016 than during th gains for these smal greater price competi-

SAMPLE TEXT

s to entry the establishme more quick vill support o s will also c e increases an revenue growth for smaller firms. Competition from larger of

billion in 20

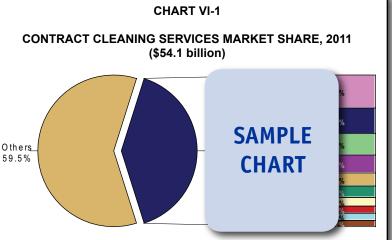
which are often better positioned to deal with increasingly stringent laws and regulations and dominate the lucrative nonresidential market, will also restrain individual proprietorship revenue growth.

Because of the low capital requirements and minimal barriers to entry in the contract interior building cleaning industry, most cleaning establishments are single proprietorships, and many of these are selfemployed individuals or partnerships where the business owners are the only employees. These smaller businesses are attractive to those interested in self-employment opportunities and allow individuals to operate the business part-time or full-time to meet their needs. Even those operations that do have additional employees tend to have a very small number of them. This trend is reflected in the relatively low number of employees per establishment (1.1) in 2011 and the relatively low annual revenues per establishment (approximately 15,300). In 2011, individual

proprietorships accounted for 89 percent of interior building services establishments, but only 17 percent of revenues.

Cleaning services are well suited as part-time businesse of the scheduling flexibility. A small business owner is free customers only for the days or hours that he or she is availab For instance, although daytime cleaning continues to grow i

77



Industry Study with Forecasts for 2016 & 2021



Sample Profile, Table & Forecast

TABLE IV-2

NONRESIDENTIAL CLEANING SERVICE REVENUES BY MARKET (million dollars)

Item

2001 2006 2011 2016 2021

Nonresidential Building Stock \$ services/000\$ stock

% nonresidential

Nonresidential Cleaning Services
Institutional Cleaning Services
Office Cleaning Services
Commercial Cleaning Services
Industrial Cleaning Services
Other Nonresidential Cleaning Svcs

Contract Cleaning Service Revenues 3t

SAMPLE TABLE

COMPANY PROFILES

CleanNet USA Incorporated

9861 Broken Land Parkway, Suite 208

Columbia, MD 410-720-6444 http://www.cle

Annual Sales: Employment:

SAMPLE PROFILE

Key Services:

al services

CleanNet Company is privately 5,260 franchises throughout the US. The Company is privately held.

The Company participates in the US cleaning service industry through the provision of contract commercial cleaning and janitorial services through a network of CleanNet USA franchises. CleanNet USA franchises offer cleaning and janitorial services on daily, weekly, and monthly schedules. Specific services include carpet and floor care, window cleaning, restroom cleaning and sanitizing, trash removal, recycling programs, elevator cleaning, and emergency services. The Company also offers the CLEAN GREEN program, which utilizes environmentally friendly chemicals, equipment, and cleaning processes in cleaning and janitorial services. In addition, CleanNet USA provides a variety of support services, including computer monitoring programs, daily logbooks, damage reports, regular site inspections, telephone surveys, and a customer service hotline for reporting special situations and emergencies at the customer's facility. Furthermore, the Company works with building managers and superintendents to develop customized cleaning programs. CleanNet USA was the fourth largest provider

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"Revenues for cleaning services in the institutional market are forecast to increase 4.9 percent per year to \$18.2 billion in 2016, which represents the second fastest growth among the different markets. Gains will be driven primarily by the continued trend of outsourcing cleaning services in medical, educational, government, and other institutional market sectors in order to minimize operating costs and improve efficiency, although advances will be moderated to some degree by competition from ..."
--Section IV, pg. 130

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OTHER STUDIES

Industrial & Institutional Cleaning Chemicals

This study analyzes the US industrial and institutional (I&I) cleaning chemical industry. It presents historical demand data (2001, 2006, 2011) and forecasts for 2016 and 2021 by market (e.g., commercial, manufacturing, institutional and government), product (e.g., general purpose cleaners, floor care products, warewashing detergents, disinfectants and sanitizers) and raw material (e.g., chlor-alkalis, surfactants, solvents). The study also considers market environment factors, evaluates company market share and profiles industry players.

#2916......July 2012.....\$5100

Janitorial Equipment & Supplies

US demand for janitorial equipment and supplies is forecast to grow 2.2 percent annually through 2015, an improvement over the 2005-2010 decline. Manual cleaning products will see the fastest gains of any major segment, driven by microfiber cloths, wipes, wet mops and squeegees. Institutional buildings will be the fastest growing market. This study analyzes the \$5.9 billion US janitorial equipment and supply industry, with forecasts for 2015 and 2020 by type, market and US region. The study also evaluates company market share and profiles industry competitors.

#2770 \$4900

Home Organization Products

US demand for home organization products will rise 3.6 percent annually through 2015. Gains will be supported by new decorative and specialty home organization products and by strong growth in larger, more expensive closet and garage systems. Bins, baskets and totes will remain the largest segment while modular units grow the fastest. This study analyzes the \$7.2 billion US home organization product industry, with forecasts for 2015 and 2020 by material, product, room and market. The study also evaluates company market share and profiles industry players.

#2774.......June 2011......\$4900

Consumer Water Purification & Air Cleaning Systems

Wipes

US wipes demand will rise 4.3 percent annually through 2014. Growth will decelerate from the 2004 to 2009 period, due to maturing markets and a shift toward more environmentally friendly consumer goods and cleaning methods. Disinfectant and electrostatic wipes will be the fastest growing types, and the industrial market will outpace the consumer segment. This study analyzes the \$1.8 billion US wipes industry, with forecasts for 2014 and 2019 by market, substrate and chemical. It also evaluates company market share and profiles industry participants.

#2697...........December 2010............\$4900

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The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

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