THE CONTRACT CLEANING
Market In The UK

2002-2011

AN ESSENTIAL MARKETING & PLANNING TOOL FOR:

- ✓ Analysing the development and forecasts of the UK market for contract cleaning:
  - Standard Cleaning
  - Specialised Cleaning
  - Complementary Services
  - Windows and Glass Facades
- ✓ Discovering factors that affect the market
- ✓ Determining the potential of the market
- ✓ Providing regional market data
- ✓ Identifying the leading players in the market and their market share

THIS REPORT INCLUDES:

- ✓ Clear and precise figures
- ✓ Detailed market segmentation
- ✓ In-depth analysis with PESTEL and SWOT

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Benefits and Strengths of this Report

The benefits of this report:

This report provides a detailed analysis of the UK market for contract cleaning during a five year review period 2002-2006 and a five year forecast period 2007 to 2011 with particular focus on 2006. All figures within the report are also presented in a separate Excel spreadsheet supplied as part of your order, which is ideal for future planning and presentations.

Coverage	This report analyses the UK market for contract cleaning. The report includes the following types of cleaning: standard, specialised, complementary services and windows & glass façade cleaning
Content	The market size and market segmentations are presented in value terms (£ million). 131 pages of in-depth market analysis and relevant information 48 clear tables & charts
This report will: help you:	determine the potential of the market with your strategic planning and budgeting

The UK Contract Cleaning market has been analysed and segmented as follows:

- The contract cleaning market by type of cleaning:
  - *standard*
  - *specialised*
  - *complimentary services*
  - *windows & glass facades*
- The contract cleaning market by end user, & by % outsourced:
  - *offices*
  - *retail*
  - *industry*
  - *education*
  - *healthcare*
  - *public buildings*
  - *leisure*
  - *transport*
  - *residential buildings*
- The contract cleaning market by type of cost:
  - *labour*
  - *material*
  - *machines & equipment*
  - *NI Costs*
  - *training*
  - *other*
- The contract cleaning market by type of service:
  - *several sites*
  - *one site*
- The contract cleaning market by type of contract:
  - *regular*
  - *occasional*
- The contract cleaning market by type of service provider:
  - *private sector (contract cleaner, facilities manager)*
  - *public sector DSP's*
- The contract cleaning market by type of customer:
  - *building occupier*
  - *facilities manger*
- The contract cleaning industry by:
  - *Number of companies*
  - *Companies by size of turnover*
  - *Employment by type of employee*
- **This report also contains:**
  - *SWOT Analysis*
  - *Market Shares for the leading players in the market*
  - *Pricing strategies*
  - *Marketing Mix analysis (product, price, promotion, place)*
  - *Profiles of 17 leading players*

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CONTRACT CLEANING: UK

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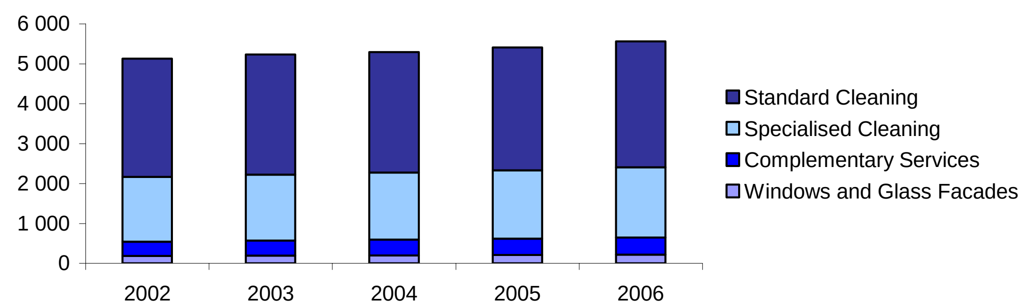
5.2 Market Segmentation

5.2.1 by Type of Cleaning, 2002-2006

10) Table: The UK Market for Contract Cleaning, by Type of Cleaning, 2002-2006



	2002	2003	2004	2005	2006	Δ 02-06	MS 06
Standard Cleaning							
Specialised Cleaning							
Complementary Services							
Windows and Glass Facades							
Total							

Unit: £ million

Source: Trade and MSI estimates

- The non-specialist nature of **standard cleaning** means that clients trust contract cleaning companies to carry out this service for them. Further more companies prefer to divest the responsibility of managing cleaning services to an outside contractor. Indeed this explains the high proportion of outsourcing of standard cleaning.

- In 2006 there was an increase in the growth of the standard cleaning segment. In 2006 there was strong growth in **construction** of offices, which increased the amount of cleaning services required. Furthermore there has been strong growth in construction within the healthcare sector, having an effect towards the end of the review period.

- In 2006 the value of the market, particularly for standard cleaning, was stimulated by increases in the **national minimum wage.** Previously cleaning companies were absorbing this increase in cost, as clients were not willing to allow the cost of contracts to increase. However in 2006 the average cost of standard cleaning increased as cleaning companies were forced to charge more for their cleaning services. Indeed, many employees in standard amount of outsourcing of cleaning services. Indeed this is a significant reason for the sustained growth within this segment.

- Growth in the value of contract cleaning within the retail sector has also been driven by strong growth in the construction of new retail premises during the review period. Indeed, this was one of the strongest growth sectors within the non-residential construction sector during the review period.

- Cleaning within the **industrial** sector increased only marginally in current terms during the review period, representing a small decline in real terms after the effect of the increased cost of service. Outsourcing of cleaning services stimulated the growth as well as the pressure of hygiene in some industrial sectors. However this industry overall is not experiencing growth in size, particularly in comparison to the services market.

- The **educational** sector experienced increased growth towards the end of the review period, as a result of increased construction within this sector. Also employees are commonly paid the minimum wage within this sector, and therefore the increases in the minimum wage increased the value of the market towards the end of the review period.

- Within the **healthcare** sector there has been sustained growth, indeed during the review period cleaning has been a very important topic of concern. This has influenced the uptake of choosing contractors based on best value, rather than cheapest price. Although this does not mean that the most expensive tender wins the contract, it does mean that there is less emphasis placed on price alone.

- Increased construction within the healthcare sector also stimulated market growth towards the end of the review period.

- The market for contract cleaning in **public buildings** has shown some growth, although this has been at a steady rate. The main reason for growth within this market is the uptake of best value principles, rather than the lowest price.

- The market for cleaning of **leisure** buildings has experienced constant increases during the review period. Indeed there has been strong construction within this sector, increasing the amount of premises to be cleaned. Furthermore there has been a steady increase in the amount of outsourcing within this segment.

- During the review period there has been sustained growth within the **transport** segment. Indeed there is an increased number of travellers on many train lines and flight routes. Furthermore there has been a trend for some increases in the amount of outsourcing, particularly at the larger stations and sites.

- The market for contract cleaning in **residential** buildings has seen strong growth during the review period. Indeed the increasing amount of flats being built, particularly in city centres, has stimulated demand for contract