Introduction and Overview

The 7th Edition of the 'Contract Cleaning Market Report - UK 2017-2021 Analysis' includes a detailed review of recent trends and developments in addition to future prospects, and offers a comprehensive review of market developments.

Key issues covered in the report include:

- Overall contract cleaning market size - trends, key driving factors etc.
- Review of key cleaning sectors including office, health, retail, education, local and central government.
- Review of the cleaning equipment and materials market.
- Key suppliers, supply chain and distribution channels to the market.
- Future prospects to 2021.

Areas of particular interest include:

- Review of contract cleaning market by size and sector - public sector, offices, education, healthcare, transport, retail etc - mix between in-house and contracted out/FM services.
- Market prospects for 2017-21 - pressures on margins and rising input costs are resulting in a very competitive market, further exacerbated by rising wage costs. Impact of uncertainty surrounding Brexit and its impact on the UK economy.
- Growth in outsourcing as organisations seek to reduce costs by focusing on key services - Key FM contractors, profiles etc.
- Trend towards powered cleaning equipment helping to underpin market for cleaning equipment and materials.

Some of the companies included:

ABM Facility Services UK, Adept Cleaning Group (Domestic), Amey, Atlas Cleaning, Better Clean, BG Cleaning, Birkin, Bright & Beautiful (Eco Cleaning), Carillion, Carlisle Support Services, Clean Genie (commercial and domestic cleaning), Consultant Services Cleaners, Devon Norse, Dublcheck, FiltaFry Plus, GSF Sandylight, ICM, Ideal Cleaning Services, Interserve, ISS UK, Jani-King (GB), Jan Pro UK & Ireland, Julius Rutherfoord, Integrated Cleaning Management, Maid2Clean (Domestic), MITIE, Minster Cleaning Services, NIC Services Group, N-Viro, OCS Group, Peartree Cleaning Services, Pinnacle Cleaning Services (Offices), Sanondaf, Spotless Commercial Cleaning, Techclean Services (computer and IT equipment), The ServiceMaster Group, Total Clean, Wetton Cleaning Services

Contract Cleaning Market Overview
Overview of contract cleaning market plus an analysis of underlying trends and key influences on the market in 2012-17.

Historical background - development of the market, influencing factors, economic influences, etc.


Key influences and trends on the development of the market - impact of the economy, legislation, environmental / sustainability issues, technological developments, changes to Minimum Wage/ National Living Wage, price competition and trends within manufacturing and construction sectors.

End-Use Sector Review

Review of key end-use sectors for the contract cleaning market - including market development since 2012 with forecasts to 2021, share of market by in-house/contracted services in 2016, key influencing factors.

Individual reviews for commercial offices, healthcare, transport, food hygiene, local authorities, central government, retail & distribution, entertainment & leisure and industrial sectors.

Contract Cleaning market size by sector 2012-21 - key trends, factors influencing market, construction trends by sector.

Contractors Review

Review of supply structure and corporate activity in recent years.

Role of Integrated FM providers, single-service contractors etc. - key trends in outsourcing, impact of public sector cuts, etc.

Profiles of leading organisations in the main supply channels - Multi-Service Providers, Contract Cleaning Companies and Franchise Networks.

Cleaning Equipment and Materials Market

Product mix by value 2016 for powered cleaning equipment, manual cleaning equipment and cleaning chemicals.

Powered Cleaning equipment - product mix by carpet cleaning, hard floor machines, pressure washers/steam cleaners.

Key suppliers to the market and analysis of leading distribution channels.

Manufacturers of cleaning products and equipment - powered cleaning, manual cleaning, etc.

Channels of distribution and supply chain - shares by companies, etc.

Report Summary

Contract cleaning is a mature and highly fragmented market, and is one of the most competitive of all the contracted-out sectors. Despite the market being highly competitive and seeing increasing pressure on profit margins, market grew marginally between 2012 and 2014 and this growth accelerated between 2014 and 2016 as economic performance improved. A significant proportion of this growth was generated by the commercial sector as new office construction and refurbishment levels improved and take up and occupancy levels increased.

Within the market, profit margins are under pressure as contractors face rising labour costs and increasing raw material and equipment costs. In addition to this, there is increasing pressure on the cleaning industry to improve standards, particularly in the healthcare sector. To meet demands, there has been a concerted effort within the cleaning industry to improve
standards and increase efficiency. The market has also suffered from public spending sector cuts which has significantly reduced budgets in the healthcare, education and central government sectors. Despite the challenges faced by contract cleaners, cleaning remains a necessity and the potential financial, quality and convenience benefits of the outsourcing of cleaning services continues to provide an attractive proposition, even during periods of economic uncertainty.

The market has also seen an underlying trend towards greater levels of outsourcing over the last decade which has driven demand for the contracting out of cleaning services. The use of new technology is driving advances in performance and efficiency, the first fully automated robotic floor cleaning machines have been launched in the UK. -The drive towards more sustainable cleaning practices has become an increasingly important issue. Clients are demanding more sustainable practices from contract cleaning companies to ensure that they waste less, reuse more and reduce pollution. Daytime cleaning is increasingly popular where a high standard of cleanliness is required in healthcare, offices, shops, leisure facilities and factories. Additionally, the demand for bundled service contracts will continue to be a strong driving force in the market as public and private sectors look to maximise value from contracts.

Overall, the prospects for the contract cleaning market are for moderate growth to 2021. The market will be impacted by economic uncertainty surrounding the Brexit negotiations and this will restrict growth in the short to medium term until the market recovers. This reduced growth level may limit the opportunities for new contracts and the expansion of existing contracts in the cleaning sector. Additionally, while the market will be negatively impacted by declines in several areas such as the retail and commercial sector. However, the market will be supported strong growth is transport sector as well as new technology driving advances.

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