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Commercial & Residential Cleaning Services

US Industry Study with Forecasts for **2013 & 2018**

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Gains will be driven by ongoing increases in both the number of households and the number of business establishments, coupled with growing availability and affordability of cleaning services.

US demand to advance 4.5% yearly through 2013

Revenues for contract commercial and residential cleaning services are forecast to advance 4.5 percent annually to \$66.8 billion in 2013. Gains will be driven by ongoing increases in both the number of households and the number of business establishments, coupled with growing availability and affordability of cleaning services. The recession that began in late 2007 and persisted through 2008 had no discernable short-term effect on cleaning services revenues; in fact, many companies reduced operating expenses by outsourcing cleaning services as the economy worsened. Longer-term growth in cleaning services revenues, however, will require economic recovery to expand the potential pool of customers.

Interior building cleaning to remain top service type

Interior building cleaning services are the largest contributor to cleaning services revenues, accounting for 74 percent of the total in 2008. Growth in revenues will derive from expansions in the number of business establishments and the total inventory of the US housing stock, both of which will create more potential customers for cleaning service providers. Also, specialized services such as special event clean-up and seasonal cleaning will continue to offer niche opportunities to cleaning companies.

US Commercial & Residential Cleaning Service Demand, 2013 (\$66.8 billion)

Institutional
Buildings
26%

Residential
24%

Office Buildings
23%

Commercial
Buildings 11%

All Other
16%



Demographic trends to benefit residential market

In the residential market, demographic trends such as the large numbers of dual-income households and the aging of the “baby boomer” generation will create opportunities for cleaning services. Such families often do not have the time or the inclination to perform cleaning tasks, while older citizens sometimes lack the physical ability to do many cleaning tasks but have the financial resources to hire professionals. These trends will benefit interior cleaning services (maid services), swimming pool cleaning and maintenance services, and pet care services. Residential cleaning services revenues are projected to

increase 5.2 percent annually to \$15.8 billion in 2013.

Nonresidential markets are the main consumers of cleaning services, accounting for more than three-quarters of the total in 2008. Revenues will benefit from the trend of outsourcing cleaning functions to cut costs. While some nonresidential markets have already seen much of this outsourcing take place, there remain opportunities for growth. Through 2013, growth in cleaning services revenues in nonresidential markets will range from 3.7 percent annually in the relatively mature office market to 4.7 percent per year in the institutional market.

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Sample Text, Table & Chart

SERVICES

Commercial Vehicle Cleaning

Commercial vehicle cleaning encompasses the interior of aircraft, boats and trains that carry passengers. Historically, the care of these modes of transport has been taken care of by in-house cleaning. Although the basic tools and equipment are similar to interior cleaning, transportation equipment cleaning firms are considered specialized. Revenues for transportation equipment cleaning were \$1.2 billion in 2008 and the segment is anticipated to see advanced growth through 2013. The segment is expected to grow at a rate of 10 percent per annum through 2013 to \$1.8 billion, driven by continued outsourcing of cleaning services.

Aircraft cleaning accounts for the vast majority of interior transportation cleaning revenues. In recent years, airlines have been under pressure to reduce costs to keep airfares down. As part of their strategy, many firms have started outsourcing cleaning services. Revenues for aircraft cleaning are anticipated to rise through 2013, as major airlines, as well as small and mid-sized airlines, continue to turn to contract cleaning. A variety of firms offer aircraft cabin cleaning services, ranging from small individual proprietorships to large, diversified service corporations. The firms that participate in the airline segment also offer many other airline-related services that are not covered here, including baggage handling, catering, passenger services and cargo handling services. Contract cleaning crews are housed directly at the terminal (like in-house staff would be), ready to clean aircraft cabins between flights. Among the key aircraft cleaning services firms are Air Service International, American Sales & Management, ARAMA, Airline Services Alliance, Swissport and Worldwide Flight Services.

A limited number of contract cleaning firms are dedicated to the cleaning of boats and trains. Special cleaning of such transportation vehicles is a niche market.

117

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TABLE IV-3

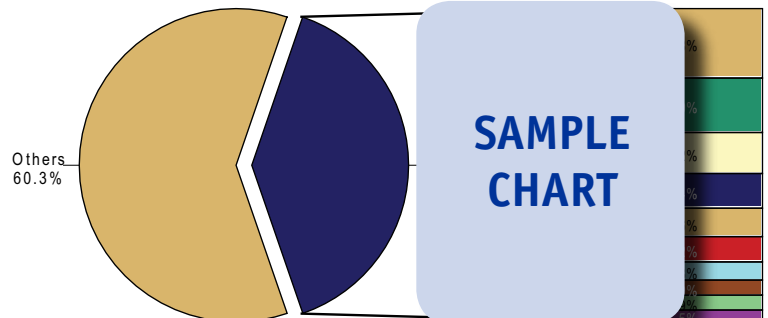
OFFICE BUILDING CLEANING SERVICES REVENUES BY TYPE
 (million dollars)

Item	1998	2003	2008	2013	2018
Office Building Space (bil sq ft)					
\$ services/000 sq ft					
Office Building Cleaning Services					
Interior Building Cleaning					
Floors, Fabrics & Surfaces					
Exterior Building Cleaning					
Swimming Pools					
Restoration & Remediation					
Other Cleaning Services					
% office buildings					
Cleaning Services Revenues					

SAMPLE TABLE

CHART VI-1

COMMERCIAL & RESIDENTIAL CLEANING SERVICES
 MARKET SHARE, 2008
 (\$53.6 billion)

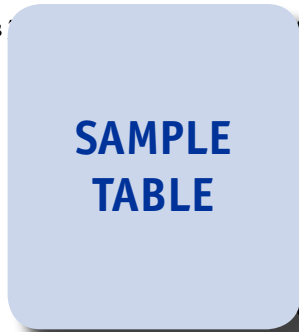


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-9
NORTHEAST CLEANING SERVICES REVENUES
BY SUBREGION & MARKET
 (million dollars)

Item	1998	2003	2008	2013	2018
Northeast Cleaning Services Revenues					
By Subregion:					
New England					
Middle Atlantic					
By Market:					
Office Buildings					
Institutional Buildings					
Commercial Buildings					
Industrial Buildings					
Residential					
Other Markets					



COMPANY PROFILES

Maids International Incorporated
 4820 Dodge Street
 Omaha, NE 68132
 402-558-5555
 http://www.m

Annual Sales:)
 Employment:

Key Services: ard residential cleaning; and hard surface floor clea

SAMPLE PROFILE

Maids International, which does business as The Maids Home Services, is a provider of residential cleaning services. The privately held company operates throughout the US and Canada.

The Company is involved in the US cleaning service industry via the provision of standard and specialized residential cleaning services. Standard residential cleaning services include general cleaning of bathroom and kitchen sinks, cleaning of kitchen surfaces, cleaning and disinfecting of toilets and other bathroom fixtures, vacuuming of carpets and upholstery, trash removal, dusting, and changing bed linens. Among The Maids Home Services' specialized cleaning services are carpet cleaning; exterior window cleaning; and tile, wood and concrete floor cleaning.

The Maids Home Services employs the 22-Step HEALTHY TOUCH system, which comprises a 22-step detailed cleaning program carried out by a four-person team. Each team member is screened prior to employment, bonded and licensed, and trained in the use of the Company's environmentally friendly products and equipment. For

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“Revenues for commercial and residential cleaning services in the New England subregion are anticipated to increase 3.6 percent per year to \$4.1 billion in 2013. New England’s per capita spending on cleaning services is the highest in the US, indicating a mature and saturated market. In addition, the New England subregion will see revenue growth limited by some of the slowest economic and population growth in the US through 2013. However, ...”
 --Section V, pg. 163

OTHER STUDIES

Consumer Water Purification & Air Cleaning Systems

This study analyzes the US consumer water purification and air cleaning system industry. It presents historical demand data (1999, 2004, 2009) and forecasts for 2014 and 2019 by technology (e.g., conventional filtration, reverse osmosis, distillation, ultraviolet, ozone, electrostatic, ionization), water purifier type (point-of-entry, point-of-use), air cleaner type (whole-house, portable) and US region. The study also considers market environment factors, evaluates company market share and profiles industry players.

#2701 February 2011 \$5100

World I & I Cleaning Chemicals

Global demand for industrial and institutional (I&I) cleaning chemicals will rise 4.4% yearly through 2013. Gains will be fastest in developing countries. The shift toward higher-end formulations with reduced environmental impact will continue, although commodity cleaners will retain their presence. This study analyzes the \$30 billion world I&I cleaning chemical industry, with forecasts for 2013 and 2018 by product, market, world region and for 18 countries. It also evaluates company market share and profiles industry participants.

#2608 April 2010 \$5800

World Major Household Appliances

Global major appliance demand will rise 2.8% yearly through 2013, driven primarily by market penetration in developing countries. In developed regions, appliance sales will depend mainly on steady replacement demand, new home building and the development of new features that prompt upgrading. This study analyzes the 434 million unit world major appliance industry, with forecasts for 2013 and 2018 by product, world region and for 25 countries. It also evaluates company market share and profiles industry players.

#2588 December 2009 \$6100

Home Organization Products

US demand for home organization products will rise 4.3% annually through 2013. Bins, baskets and totes will remain the largest group while modular units grow the fastest. Garage units will overtake family room products as the second largest segment, with closet organizers also doing well. This study analyzes the \$7.2 billion US home organization product industry, with forecasts for 2013 and 2018 by material, product, room and market. It also evaluates company market share and profiles industry players.

#2527 July 2009 \$4600

Disinfectant & Antimicrobial Chemicals

US demand for disinfectant and antimicrobial chemicals is projected to grow 3.6% annually through 2013. The consumer market will grow the fastest, driven by fears of foodborne and other pathogens, while paint and coatings remains the largest market. Organosulfurs will be the fastest-growing product category. This study analyzes the \$1 billion US disinfectant and antimicrobial chemical industry, with forecasts for 2013 and 2018 by market, function and product. It also evaluates market share and profiles industry players.

#2474 March 2009 \$4600

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