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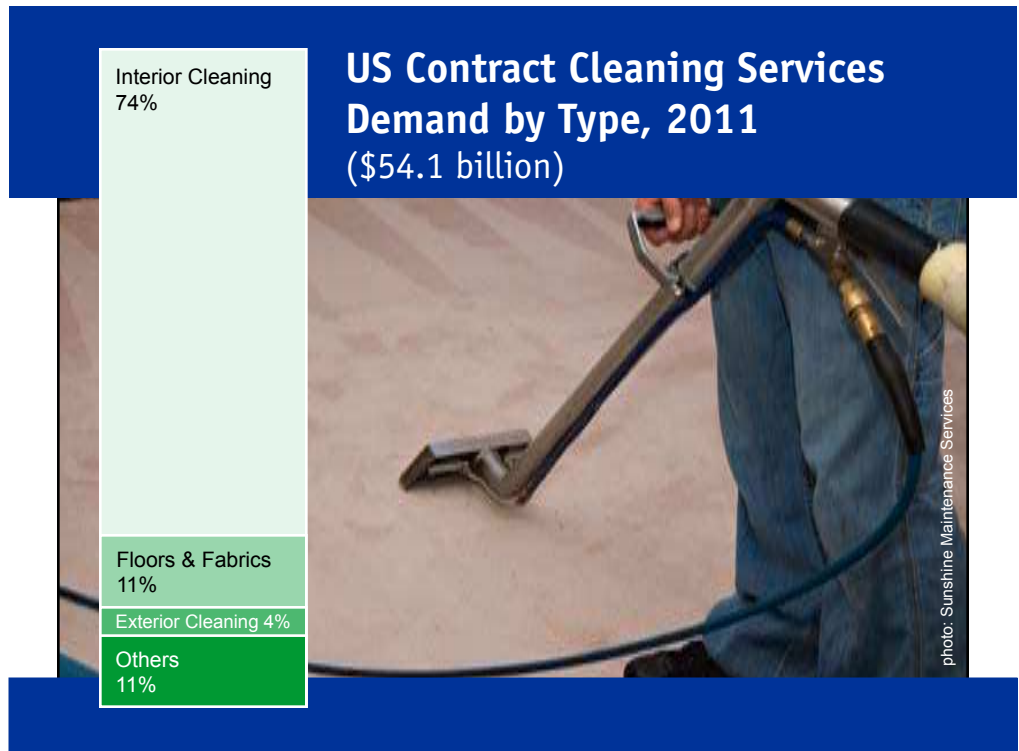
Growth in the number of households and businesses will aid revenue gains for US firms, as will a diversification by companies to offer a wider range of services at competitive prices.

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 in-house 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



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.

Sample Text, Table & Chart

SERVICES

Individual Proprietorships -- Revenues earned by contract interior cleaning service firms organized as individual proprietorships are anticipated to grow to \$54.1 billion in 2011. Revenues will benefit primarily from the entry of new firms to enter this segment of the market. The number of establishments as individual proprietorships will increase more quickly in 2016 than during the 2006-2011 period. This will support overall gains for these small firms. This will also encourage greater price competition, which will increase and revenue growth for smaller firms. Competition from larger firms, 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 self-employed 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 cleaning services establishments, but only 17 percent of revenues.

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

TABLE V-5

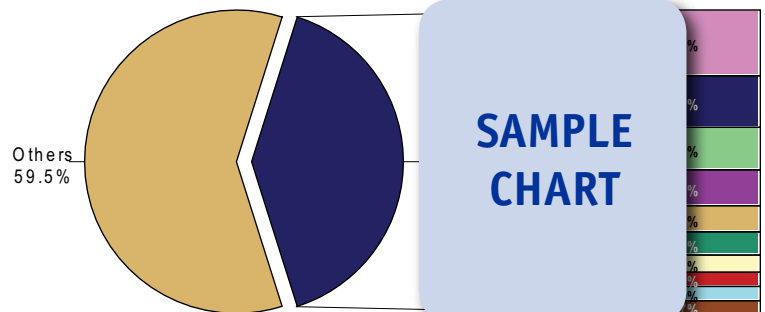
CONTRACT CLEANING SERVICE REVENUES BY REGION (million dollars)

Item	2001	2006	2011	2016	2021
Population (millions)					
\$ services/capita					
Nonresidential Floor Space (bil sq ft)					
\$ services/000 sq ft					
Cleaning Services					
Northeast					
Midwest					
South					
West					

SAMPLE
TABLE

CHART VI-1

CONTRACT CLEANING SERVICES MARKET SHARE, 2011 (\$54.1 billion)

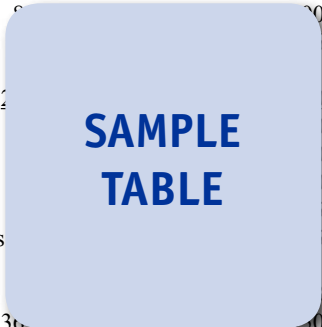


SAMPLE
CHART

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 Cleaning Services					
Institutional Cleaning Services					
Office Cleaning Services					
Commercial Cleaning Services					
Industrial Cleaning Services					
Other Nonresidential Cleaning Svcs					
% nonresidential Contract Cleaning Service Revenues	30				30



COMPANY PROFILES

CleanNet USA Incorporated
 9861 Broken Land Parkway, Suite 208
 Columbia, MD
 410-720-6444
 http://www.cle

Annual Sales:
Employment:
Key Services: ... al services

CleanNet USA provides contract cleaning and janitorial services via a network of approximately 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

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 August 2011..... \$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

US demand for consumer water purification and air cleaning systems will rise 5.2 percent per year through 2014. Conventional filters will remain the dominant water purification system, while higher-value reverse osmosis and distillation systems grow the fastest. Electrostatic cleaners will lead gains in the air segment. This study analyzes the \$1.3 billion US consumer water purification and air cleaning system industry, with forecasts for 2014 and 2019 by technology, product and regional market. It also evaluates company market share and profiles industry players.

#2720 March 2011..... \$5100

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

About The Freedonia Group

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:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

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