



Freedonia Focus Reports
US Collection

Contract Cleaning Services: United States

February 2019



BROCHURE
CLICK TO ORDER
FULL REPORT

www.freedoniafocusreports.com

Table of Contents

1. Highlights	3
2. Market Environment	4
Historical Trends	4
Key Economic Indicators	5
Environmental & Regulatory Factors	6
3. Segmentation & Forecasts	9
Services	9
Interior	11
Swimming Pool	13
Carpet & Upholstery	14
Exterior	15
Restoration & Remediation	16
Other Services	18
Markets	20
Nonresidential	21
Residential	22
Transportation & Other	23
4. Industry Structure	25
Industry Characteristics	25
Market Leaders	30
Jani-King International	30
Premium Franchise Brands	31
Coverall North America	31
5. About This Report	32
Scope	32
Sources	32
Industry Codes	33
Freedonia Methodology	33
Resources	35

List of Tables & Figures

Figure 1 Key Trends in US Contract Cleaning Service Revenues, 2018 – 2023	3
Figure 2 US Contract Cleaning Service Revenue Trends, 2008 – 2018	4
Table 1 Key Indicators for US Contract Cleaning Service Revenues, 2008 – 2023	5
Figure 3 US Contract Cleaning Service Revenues by Type, 2008 – 2023 (US\$ mil)	9
Table 2 US Contract Cleaning Service Revenues by Type, 2008 – 2023 (US\$ mil)	9
Figure 4 US Contract Cleaning Service Revenues by Type, 2008 – 2023 (%)	10
Figure 5 US Contract Cleaning Service Revenues by Market, 2008 – 2023 (US\$ mil)	20
Table 3 US Contract Cleaning Service Revenues by Market, 2008 – 2023 (US\$ mil)	20
Figure 6 US Contract Cleaning Service Revenues by Market, 2008 – 2023 (%)	21
Figure 7 US Contract Cleaning Employer Firms, Establishments, & Employment 2008 – 2018	26
Table 4 US Employer & Nonemployer Contract Cleaning Firms, Establishments, & Employment, 2008 – 2018	26
Figure 8 US Contract Cleaning Service Employer & Nonemployer Establishment & Revenue Shares, 2018 (%)	27
Figure 9 US Contract Cleaning Service Revenue Concentration for Employer Firms, 2002 – 2012	27
Figure 10 US Contract Cleaning Employer Firm Revenue Concentration for Top 4 Firms by Service, 2002 – 2012	28
Figure 11 US Contract Cleaning Service Employer Firm Net Profit Margin, 2008 – 2018	28
Table 5 US Contract Cleaning Service Employer Firm Net Profit Margin, 2008 – 2018 (%)	29
Table 6 Leading Participants in the US Contract Cleaning Service Industry by Type	30
Table 7 NAICS & SIC Codes Related to Contract Cleaning Services	33

About This Report

Scope

This report forecasts to 2023 US contract cleaning service revenues in nominal US dollars. Total revenues are segmented by service type in terms of:

- interior
- swimming pool
- carpet and upholstery
- exterior
- restoration and remediation
- other contract cleaning services such as chimney, drain, and gutter cleaning; ventilation duct and hood cleaning; and snow plowing of driveways and parking lots

Total demand is also segmented by market as follows:

- nonresidential
- residential
- transportation and other markets such as amusement parks, public venues, and stadiums

To illustrate historical trends, total revenues, the various segments, the number of employer firms, employer establishments, employment, and nonemployer establishments are provided in annual series from 2008 to 2018.

This report represents the revenues of employer and nonemployer firms. Excluded from the scope of this report are services conducted by an in-house staff and other building maintenance services such as landscaping, pest control, and security.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Contract Cleaning Services: United States (FF95021) represents the synthesis and analysis of data from various secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations

About This Report

- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | NAICS & SIC Codes Related to Contract Cleaning Services

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industrial Classification	
561720	Janitorial Services	7217	Carpet and Upholstery Cleaning
561740	Carpet and Upholstery Cleaning Services	7349	Building Cleaning and Maintenance Services, NEC
561790	Other Services to Buildings and Dwellings	7389	Business Services, NEC
		7699	Repair Shops and Related Services, NEC

Source: US Census Bureau

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global

About This Report

data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Freedonia Industry Studies

Global Flooring

Global Industrial & Institutional Cleaning Chemicals

Global Security Services

Industrial & Institutional (I&I) Cleaning Chemicals

Private Security Services in the US

Freedonia Focus Reports

Employment Services: United States

Janitorial Equipment & Supplies: United States

Landscaping Services: United States

Laundry & Linen Services: United States

Professional Services: United States

Repair Services: United States

Waste Management: United States

Freedonia Custom Research

Trade Publications

Building Services Management

Buildings

Cleaner Times

Cleaning & Maintenance Management

Cleaning Business Today

Services

Agencies & Associations

The Association of Pool & Spa Professionals

Building Service Contractors Association International

Federal Trade Commission

Institute of Inspection Cleaning and Restoration Certification

International Franchise Association

International Window Cleaning Association

ISSA – The Worldwide Cleaning Industry Association

Occupational Safety & Health Administration

The Outsourcing Institute

United States Census Bureau

United States Environmental Protection Agency