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Building Maintenance Services

US Industry Study with Forecasts for **2017 & 2022**

Study #3002 | April 2013 | \$4900 | 298 pages

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Improvement in construction spending, disposable personal income, and business establishments is expected to renew interest in outsourcing building maintenance or “do-it-for-me” services.

US revenues to grow 4.3% annually through 2017

Revenues for contract (non-proprietary) building maintenance services are projected to grow 4.3 percent per year through 2017 to \$176.5 billion. This rate will be an improvement over that posted during the 2007-2012 period, as growth was hampered by the recession and subsequent slow recovery. During the downturn, many establishments in the nonresidential market reduced or eliminated spending on maintenance services since they are not revenue-generating, and a number of homeowners opted to perform maintenance activities themselves.

Going forward, improvement in construction spending, disposable personal income, and business establishments is expected to renew interest in outsourcing building maintenance or “do-it-for-me” services. However, the outsourcing trend has been maturing in some markets, and while the high level of price competition in the industry helps make these services affordable to more potential users, it also will restrain further gains in market value.

Pest control to be fastest growing service segment

Building maintenance services include landscaping, interior building cleaning, pest control, exterior building cleaning,

US Building Maintenance Service Revenues, 2017 (\$176.5 billion)



photo: Terminex Commercial

street and parking lot cleaning and maintenance (including snowplowing), swimming pool cleaning, and other services (e.g., HVAC and other building system maintenance). Barriers to entry are low, with most segments being highly labor intensive but requiring little fixed investment. Firms participating in the building maintenance industry range from one-person operations to large, diversified corporations, including many participants organized under a franchise model.

In 2012, landscaping accounted for nearly half of all building maintenance service revenues. This segment benefits from the availability of these services at

a variety of frequency and price levels, from weekly lawn mowing and seasonal fertilization to more intensive services such as tree installation or removal. Through 2017, pest control is projected to achieve the fastest growth, as an increase in certain pest populations (particularly bed bugs), growing concern for environmental health and safety, and more stringent regulations regarding the handling and storage of pesticides promote the hiring of contracted extermination professionals. Interior building cleaning services, which accounted for the second largest share of revenues in 2012 with 34 percent, will generate above average gains due to a return to more frequent cleaning schedules.

Sample Text, Table & Chart

MARKETS

Office

The office market was the second largest user of building maintenance services in the nonresidential sector, accounting for 27 percent of the total revenues for the nonresidential segment in 2012. In the institutional market, office buildings have a significant need for maintenance services due to the high foot traffic these buildings experience on a daily basis. Through 2017, revenues for office building maintenance services are expected to grow at an annual rate of 2.2 percent per year to \$1.2 billion, a rate which is below the nonresidential average. Growth is limited by the relatively mature market and the fact that the market is particularly for services such as landscaping, pest control, and building cleaning.

**SAMPLE
TEXT**

Interior building maintenance is by far the largest segment of office building maintenance services, accounting for over 60 percent of total revenues. Offices typically already contract out these services since they are outside of core operations. This segment will see above average growth relative to the rest of the office segment as companies return to more frequent cleaning schedules from the reduced levels of the 2007-2012 period. Concerns regarding the potential negative health effects of poor indoor air quality will support demand for contract interior cleaning services in office buildings. Additionally, companies are increasingly taking steps to maintain a healthier workforce in order to maximize productivity and minimize absences due to illness. However, market maturity and generally slow gains in office floor space will continue to hamper growth.

The office market also sees a significant amount of landscape maintenance demand, with these services accounting for about one-fourth of office building maintenance service revenues. However, this segment will see growth below the office segment average, as landscape maintenance is generally a necessary operating expense rather than a discretionary one.

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TABLE V-8

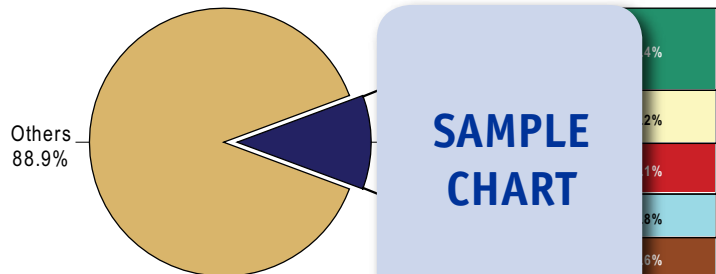
NORTHEAST BUILDING MAINTENANCE SERVICE REVENUES BY SUBREGION & MARKET (million dollars)

Item	2002	2007	2012	2017	2022
Northeast Nonres Floor Space (bil sq ft)					
\$ revenues/000 sq ft					
Northeast Bldg Maintenance Services					
By Subregion:					
New England					
Middle Atlantic					
By Market:					
Residential					
Nonresidential					
Institutional					
Office					
Commercial					
Industrial					
Other Nonresidential					

**SAMPLE
TABLE**

CHART VI-1

BUILDING MAINTENANCE SERVICE MARKET SHARE (\$143.1 billion, 2012)



**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE III-4
TREE & SHRUB SERVICE REVENUES

Item	2002	2007	2012	2017	2022
Gross Domestic Product (bil \$)	10	14	18	22	27
\$ revenues/000\$ GDP					
Tree & Shrub Service Revenues (mil \$)					
Nonresidential					
Residential					
000\$ revenues/establishment					
Tree & Shrub Establishments (000)					
employees/establishment					
Tree & Shrub Employees (000)					
% tree & shrub					
Landscaping Revenues (mil \$)	42	52	62	72	82

**SAMPLE
PROFILE**

COMPANY PROFILES

Coverall North America Incorporated

5201 Congress
 Boca Raton, FL
 561-922-2500
<http://www.coverall.com>

Annual Sales: \$1.2 billion
 Franchises (estimated): 150
 Employment: 10,000

Key Services: exterior window washing, light maintenance, power or pressure washing, parking lot maintenance, and interior cleaning services

Coverall North America, which does business as COVERALL HEALTH-BASED CLEANING SYSTEM, is a leading, privately held franchiser of turnkey commercial cleaning businesses. The Company allows clients to buy franchises at the basic, master domestic, and master international levels.

The Company is active in the US building maintenance services industry via a network of franchises that provide daily, weekly, or monthly commercial cleaning services. Services offered by The Company include exterior window washing, light maintenance, power or pressure washing, and parking lot maintenance. In addition, the Company offers such interior cleaning services as restroom sanitation and deodorization, special function clean up, blind cleaning, hard floor care, interior window cleaning and carpet/upholstery care. COVERALL HEALTH-BASED CLEANING SYSTEM serves various types of commercial clients, among them warehouses, health care centers, manufacturing facilities, educational and child care facilities, automobile dealerships, airports, transportation buildings, offices, retail stores,

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**SAMPLE
TABLE**

“Revenues for contract tree and shrub services are expected to advance 4.3 percent per year through 2017 to \$23.5 billion. Advances will slightly edge those of the landscaping market as a whole, as these services are generally more expensive, and so were more likely to have been cut or delayed during the recession than many of the more basic services included in the lawn and garden segment. Tree and shrub care services are not required at the frequency or level of lawn and garden care, and many consumers find ...”

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OTHER STUDIES

Power Lawn & Garden Equipment

This study analyzes the US power lawn and garden equipment industry. It presents historical demand data for the years 2002, 2007 and 2012, and forecasts for 2017 and 2022 by product (e.g., lawnmowers, turf and grounds equipment, trimmers and edgers, garden tractors and rotary tillers, snow throwers), market (e.g., residential, commercial), material (e.g., metals, plastic) and US region. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry players.

#3008 April 2013 \$5100

World Security Services

Global demand for private contract security services will increase 7.4 percent annually to \$244 billion in 2016. China, India, Mexico, Russia, and South Africa will lead gains, but the US will remain the largest consumer. Contract guarding will continue as the most common service while alarm monitoring grows the fastest. This study analyzes the \$171 billion world security service industry, with forecasts for 2016 and 2021 by service, market, world region and for 21 major countries. The study also evaluates company market share and profiles industry participants.

#2978 January 2013 \$6400

Private Security Services

US demand for private contracted security services will rise 5.4 percent annually to \$64.5 billion in 2016. Security consulting will lead gains, followed closely by systems integration and management. Alarm monitoring and correctional facilities management will also do well. The residential market will outpace the dominant nonresidential segment. This study analyzes the \$49.7 billion US private security service industry, with forecasts for 2016 and 2021 by type, market and region. The study also evaluates company market share and profiles industry players.

#2944 October 2012 \$5100

Lawn & Garden Consumables

US packaged lawn and garden consumables demand will rise 3.3 percent yearly to \$8.8 billion in 2016. Pesticides and fertilizers will remain the top segments, with fertilizers, seeds and growing media the fastest growing. Organic formulations will outpace conventional types, but from a much smaller base. This study analyzes the \$7.5 billion US lawn and garden consumables industry, with forecasts for 2016 and 2021 by product, formulation, market, application, end user and US region. The study also evaluates company market shares and profiles industry players.

#2891 May 2012 \$5100

Contract Cleaning Services

US revenues for contract cleaning services are forecast to rise 4.8 percent yearly to \$68.3 billion in 2016. Interior cleaning services will continue to account for the largest share of sales, but revenue from exterior cleaning services will grow the fastest. The industrial, institutional and residential markets will offer above-average growth prospects. This study analyzes the \$54.1 billion US contract cleaning service industry, with forecasts for 2016 and 2021 by service, market and region. The study also evaluates company market share and profiles industry players.

#2886 May 2012 \$4900

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