Facilities Management Market
Research & Analysis UK 2010

REPORT SAMPLE

Facilities Management Market Size & Review 2004-2009; SWOT & PEST Analysis, Mix by Service Type 2004-2013; End User Mix 2004-2013; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Forecasts to 2013

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Research & Analysis Report Contents

Market Report Tables & Charts

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Estimates Provided

In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

1. Introduction to *Research & Analysis* Reports

1.1Key Features & Benefits of this *Research & Analysis* Report

MTW's *"Research & Analysis"* market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, end user mix, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product / Service Mix – Current & Future**

This report identifies the key product or service sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **End User / Channel Mix – Current & Future**

The report identifies the key end use sectors or channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key end use sectors also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's *'at a glance'* chart, enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

1.2Introduction to this *Research & Analysis* Report

In order to provide a comprehensive review of the market, this report includes:-

THE MARKET, PRODUCTS & END USERS

- **Market Size & Key Market Trends 2004-2013** – Value of the market since 2004 is provided with current market size estimates provided based on quantitative sales figures from the industry. Profitability, assets, liabilities and net worth are also illustrated in easy to read, yet stylish charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2013. Key market trends are also identified and discussed providing the report with both 'quantitative' and 'qualitative' characteristics.

- **PEST Review & Key Market Influences** – A review of the key issues and influences which are impacting market demand at present & in the future are also provided. These issues range from economic, political, environmental, social and technological and are identified and discussed where appropriate, providing the reader with a greater depth of market intelligence. A strategic PEST review for this market is also illustrated in chart format for faster reference.

- **Product Mix & Trends** – This report identifies the key sectors which comprise the overall market and provide a current & historical share by value. This data is supported by qualitative comment where appropriate in order to offer more substantive market knowledge. Forecasts to 2013 are also provided to offer more insightful market intelligence.

- **SWOT Analysis** – A strategic SWOT analysis for the market is also provided based on input from primary and secondary sources in the industry. By identifying key strengths, weaknesses, opportunties and threats, this report provides a more solid foundation for basing strategic and operational marketing decisions.

- **End User / Channel Mix & Trends** – By providing historical, current and forecast shares by end user or channel for this market, the report provides an invaluable illusrtation of the key sectors that are currently driving demand and likely future prospects. Qualitative comment on key trends within these sectors based on input from the industry provides a more in-depth review of the market as well as illustrating the most likely future scenarios.

THE SUPPLIERS & INDUSTRY STRUCTURE

- **Industry Structure** – The report includes a detailed and quantitative review of the industry in terms of number of companies, share by turnover, mix by employees, geographical mix, share by age of companies, mix by recent sales performance, sales per employee, share by credit rating & mix by location type (e.g head office/branch etc).

- **Industry Trends 2004 –2013 –** Industry totals and averages since 2004 are also provided for turnover, profitability, assets, net worth and liabilities. These indicators provide vital insight into the current health of the industry and are forecasted to 2013.

- **Supplier Review** – This report provides in-depth intelligence of relevant and leading players in this market. Each company is ranked by turnover, profitability, number of employees and other key financial indicators. Each company also has a 1 page profile identifying contact details, overview of activities, key financials for the last 4 years and an *'at a glance'* financial health chart. The report also provides turnover estimates for every company, regardless of size, enabling the reader to easily identify individual market shares.

2. UK FACILITIES MANAGEMENT MARKET

2.1EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Facilities Management market comprises of a wide range of activities within a variety of public and private end use sectors. Valued at more than £85 billion in 2010, this report reviews the key market trends and influences for facilities management contractors and the implications of these for suppliers of equipment and materials to these contractors.

The Facilities Management market comprises of the following key market sectors, with this report reviewing and providing market share for each of these sectors since 2004, with forecasts to 2013:-

- **Integrated / Bundled Facilities Management**
- **Property & Operations & Maintenance**
- **Office Support Services**
- **Security**
- **PFI / PPP FM**
- **Contract Catering**
- **Contract Cleaning**

In addition to analysis of these sectors, the report also reviews market trends and shares accounted for by the key end use sectors since 2004, with forecasts to 2013. End use markets reviewed include:-

- **Education (private & public)**
- **Health (private & public)**
- **Central & Local Government**
- **Social Housing**
- **Financial / Professional**
- **Transport / Logistics**
- **Utilities**
- **Technological / Communications**
- **Manufacturing**
- **Retail**
- **Property Management**
- **Leisure**

In early 2010, the UK FM market is currently valued at just under £90 billion in annualised terms, with sources indicating that most sectors are now experiencing more positive demand patterns, though pricing pressures remain keen in a number of key end use markets.

The UK facilities management market is estimated to have grown in value by
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companie … on their
primary b

Whilst the … ents,
sources i … nts to seek
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Report Sample

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years. T … erefore be
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recession

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around 6 … companies
typically … eduction in
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are that t … ntinue to
grow in th

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particular … nigration,
security, … n issues.
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opportuni … e making
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During 2 … ised by a
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relationsh … efficiencies
and redu … rogrammes
specificall … material
and equi … nciples and
accountable for their own supply chains. These supplier improvement

programmes vary in scope, though typically include audits in relation to CRM
and susta y to which
suppliers

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identify w lds such as
purchasin onships and
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that in so of more
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pressure

Report Sample

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buoyant g ated to
outstrip o a result.
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opportuni

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to continu with
minimal c rs.

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standing. cilities
Managem .

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of the ma ercial
offices an population.
London is t regions in
the Facilit llands,
North We

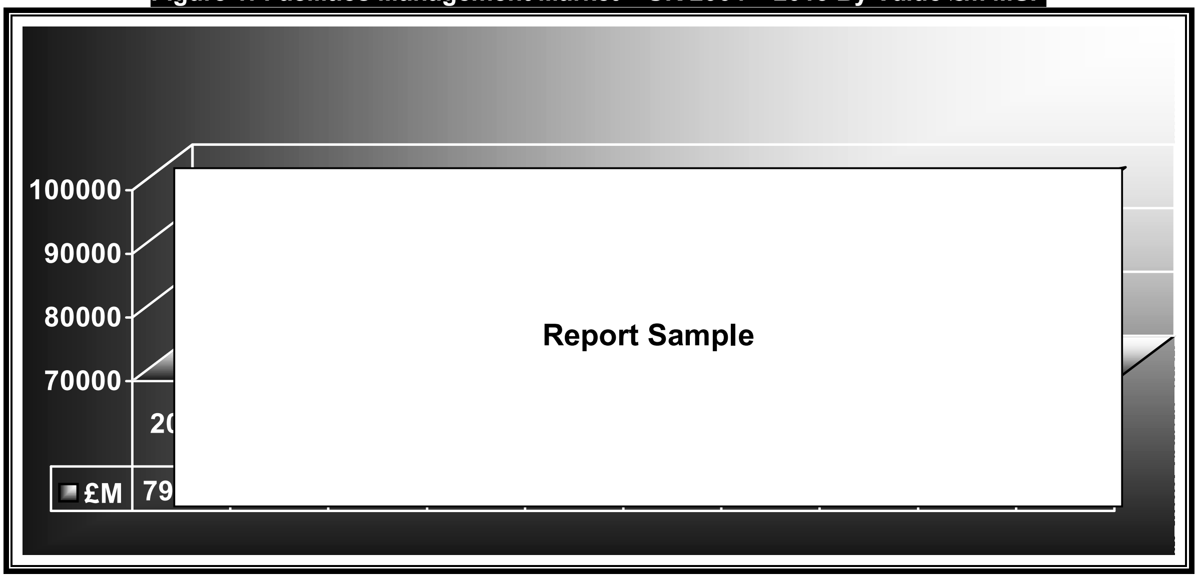
By the en a value of
around £ expenditure
coupled w ese key
market in as public
spending ere remains
uncertain to longer
term, as t during the
recent re gap left by
reduced p ived from a
wide range of private end use sectors.

2.2FACILITIES MANAGEMENT MARKET SIZE & TRENDS 2004-2013

2.2.1 Facilities Management Market Size 2004-2013 – Current Prices

The UK Facilities Management market encompasses a wide range of services and is estimated to be worth just under £xx billion in 2009 as illustrated in the following chart:-

Figure 1: Facilities Management Market – UK 2004 – 2013 By Value £m MSP



Source: MTW Research / Trade Estimates

The UK facilities management market is estimated to have grown in value by around 9 … toward companie … their primary b …

Report Sample

Between … healthy increases … with inflation a … dustry overall.

This healt … en the impact of … tion, in volume g … ness confidenc …

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estimated to h l
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Report Sample

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the UK econon
years. The re e
described as r
recession duri

2.2.2 Facilities Management Market Size 2004-2013 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2004, with forecasts to 2013:-

Figure 2: Facilities Management Market – UK 2004 – 2013 Constant Prices £M

Source: MTW Research / Trade Estimates

As illustrated, based on constant 2004 prices, the Facilities Management market
has decl During
2007 an the FM
market, ourcing.

Report Sample

The imp inflation
from mi h FM
clients a industry's
challeng lity and
limiting price' in
the indu ost-saving
program

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estimate ent, with
these co and
provide this sector
has flou vity
prevaler ted FM
services main
keen.

A wide r
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sector.
develop e
pressure nies to
reduce c cies and
addressing these broader challenges.

As TFM companies increasingly dominate the volume end of the market, smaller
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Increasingly, T
smaller and m
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penetrate this

Report Sample

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companies are
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from TFM prov
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Price competit
and one which
indicate that o
has declined r
2007. Whilst
downturn, indi
clients seeking
to their busine

Trade sources
2008 and 200
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anticipating ar
quickly in mid
H2, 2010 and

During 2008 a
from the publi
underpinning t
2007, all local
gains, whilst a
use of FM serv
is a trend which is likely to continue in the medium to longer term.

The FM market has also benefitted from additional spending by Central
Governmen
meet their ther
public trans
congestion tor
has grown st
of services
infrastructu
industry in
across the

Report Sample

Immigratio d
the FM mar rder
security iss
centres. S tent
approaches lso
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deep clean o
the FM mar in
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than others
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trend in the
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and reduce
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that materi ip
principles a
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policy to which suppliers are expected to adhere.

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wide rangi… y to
identify wh… uch as
purchasing … ips and
developing … dicate
that in som… of
more effici… ding
further pre…

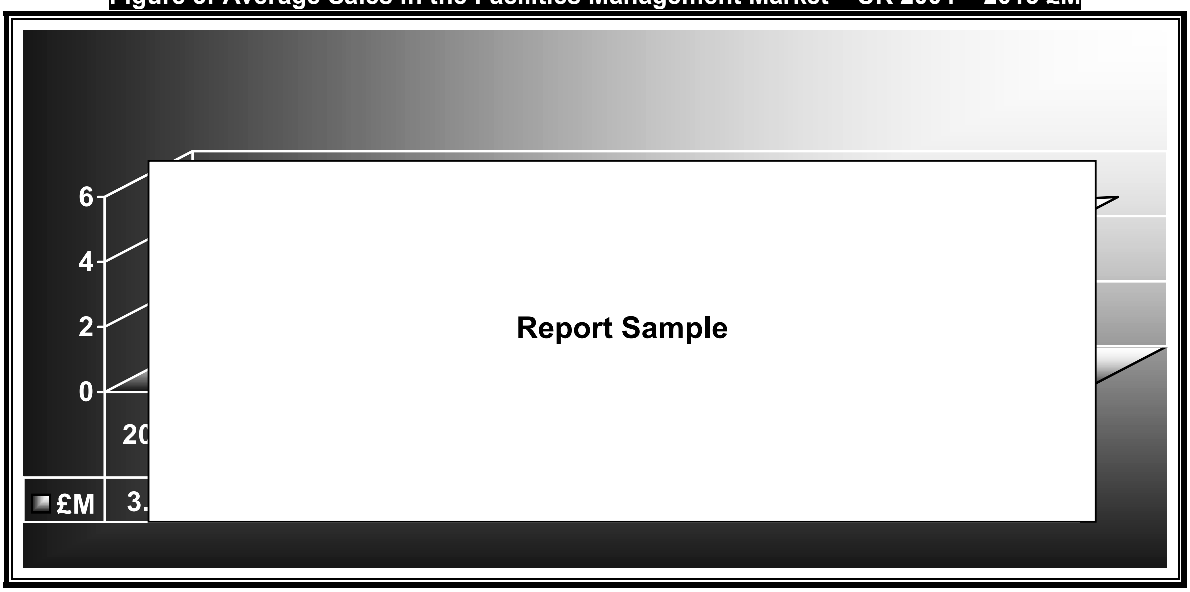
Report Sample

Given the l… oupled
with only m… or as
confidence … n 2010
and minima…
growth is f… eal
term growt…

2.2.3Average FM Contractor Sales Revenue 2004-2013

The following chart illustrates the average level of sales in the Facilities Management market since 2004 and forecasts to 2013:-

Figure 3: Average Sales in the Facilities Management Market – UK 2004 – 2013 £M



Source: MTW Research / Trade Estimates

The calculation of average sales in the FM sector is particularly difficult given the
comp… nies
activ… eline
estim… al nature
of th…

Report Sample

Durin… ed
arou… nd an
incre… e sales
are e… of
impr… er of
smaller companies active in the sector.

The Facilities Management market remains particularly fragmented at present,
with a[...] rom sole
trader [...] ers.
Despit[...] e industry
may b[...] ngly seek
to outs[...] term
theref[...] d with
other [...] ood
opport[...]

Report Sample

Many [...] services,
are cu[...] present.
With c[...] at present,
suppli[...] main under
pressu[...]

Source[...] by the
recess[...] nities. As
such, t[...] ps and
those [...] ough
differe[...] t likely to
grow s[...]

With m[...] ement
marke[...] in the last
year. [...] contracts
with m[...] a preferred
suppli[...]

Whilst [...] defined
specia[...] ncing factor
on the [...] t, with this
issue b[...] creasingly
seek t[...] ler FM
compa[...] ng and
adding [...] example,
within [...] view real
time p[...] here mobile
cleane[...] ms are just
two su[...] ce
compe[...]

Despit[...] price
pressu[...] m to longer
term. [...] f sides
which [...] e is
primar[...] ey end use
sector[...] accept
price r[...] s and the
need t[...]

The need ... market
is increas ... brought
about by ... tighter
legislation ... safety
standards ... their
sites with ... c toward
achieving

Report Sample

Future Prospects

By the end of this year, the overall FM market is expected to grow to a value of
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expendi ... sector.
This key ... n 2011, as
public s ... vers.

Report Sample

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incurred ... es remain
confiden ... a more
buoyant ... . Further,
given cu ... ces will
rise pos ... tions and
mainten

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activity ... onger
term, as ... ement are
sought. ... and
market ... italise on
econom
geograp

Whilst t ... services
in the m ... provision
in the p ... the
longer t ... e overall
O&M cos ... y in the
public s ... lished a
framework for the use of outsourcing by the public sector. The review's key
conclusions revolved around the following key points:-

- **Con**
- **Cos**
- **Ser**
- **Usi**

Report Sample

A key conc ... s of
around 20%, which should sustain healthy demand for FM services from the

public sector in the longer term. The review identifies five key work streams
where … office and
IT fun…
empow… cal agenda
and a … the public
sector … deliver
billions…

Report Sample

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rising … wth. The
rising … ard the
manag… innovative
appro… hould be
able t… ent is
respo… g new
prison…

The de… ted in a
rapid … nificantly
to pre… average life
expect… in a UK
popul… d for
additi… with FM
servic… ector.

The F… the
transp… to
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take a…

Climat… likely to
becom… ers will be
requir… ranging
from i… reducing
counci… and refuse
collect…

2.3KEY MARKET TRENDS IN THE FACILITIES MANAGEMENT MARKET

The following section reviews some of the key trends in terms of financial performance of the UK Facilities Management market since 2004, and forecasts to 2013.

2.3.1Facilities Management Industry Profitability 2004-2013

The following table illustrates the performance of the Facilities Management market in terms of profitability between 2004 and 2009 and provides forecasts to 2013:-

Figure 4: Facilities Management Market Profitability – UK 2004 – 2013 £M

Report Sample

e Estimates

Profitabili ... at just
under £2. ... Between
2004 and ... and
from a nu ... private
markets. ... focused
on stream ... n, in
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As illustra ... ns, with
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that durin
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been a ke ... nd whilst
labour co ... nce to
pricing pr ... roughout
2010.

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additiona

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Report Sample

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and ca iers to the
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is also nvestment
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short t

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2004 a

3 £M

Trade Estimates

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Report Sample

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unviab iness or
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purcha decision.

Averag rising to
just ur to the low
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econon ver
£151,0

2.3.2 Facilities Management Industry Assets 2004-2013

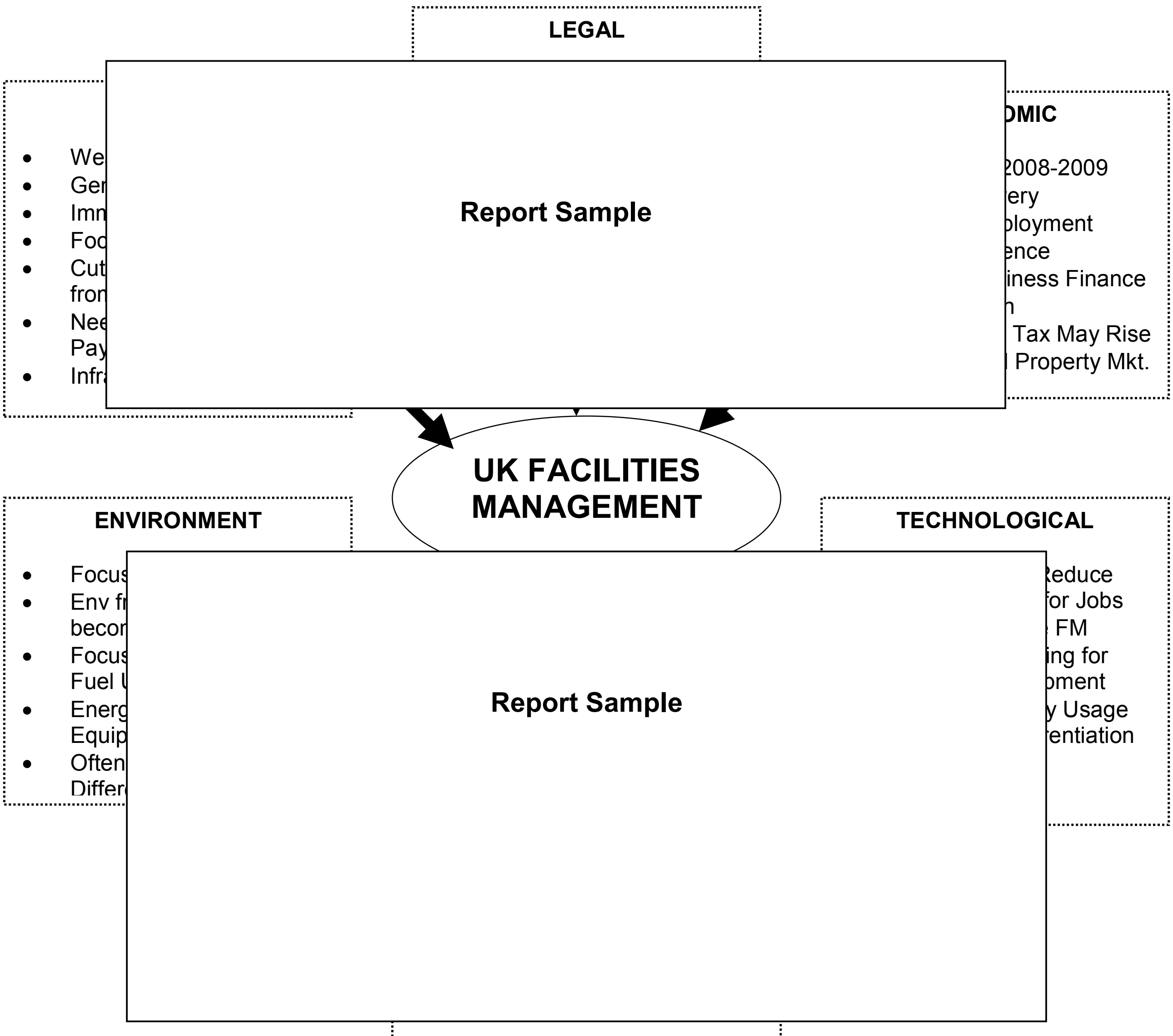
The following table illustrates the Facilities Management market in terms of current and fixed assets between 2004 and 2009 and forecasts to 2013:-

2.4KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

2.4.1PEST ANALYSIS – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK Facilities Management market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 13: PEST Analysis for UK Facilities Management Market in 2009



Source: MTW Research Strategic Review 2010

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.4.2 Political & Legal Influences & Trends

Report Sample

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into a … efore
consi … electorate
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into a … gility in
terms … or often
fairly … ng in most
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confe … st that the
next … y, in early
2010 … conclusion
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UK p … s fiasco, the
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Indep … act cleaners
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Report Sample

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the 2. in reduced
expend mic deficit
has gr s regarding
public owing the
failed ide some
growth

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source ector whilst
service ure on an
already

2.4.3Economic Influences & Trends

To the surprise of many commentators, the UK economy remained in recession during the third quarter of 2009 according to the UK government statistical office. With many anticipating some minimal growth in GDP output, this news further dampened business confidence in many sectors of the UK economy, particularly within the financial markets.

Gross Domestic Product 2004-2013

The following chart illustrates the current and future prospects for the UK economy in terms of GDP growth at current prices:-

2.4.4 SWOT Analysis – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the Facilities Management market, the following table identifies some of the key strengths & weaknesses evident in the UK Facilities Management market at present:-

Figure 18: Key Strengths & Weaknesses in the Facilities Management Market 2009-2013

STRENGTHS	WEAKNESSES
• Long accu facilit • High quoti • Wide mear • Most busin accor • Ackn oppo proje • Contr the in • High arour exper • Mark spen educ • 80% • Majo estab • Effici used marg • Econ the la profit • Unde order • More 'exce	hin FM cts which s. of FM sult in high re price rom ion. dent by dustry pecialist exodus of n home. s of price . y affected s & pubs nds at less tion for arded as a ther than a itive.

Report Sample

Source: MTW Research Strategic Review 2009

The following table identifies some of the key opportunities and threats evident in the market at present:-

Figure 19: Key Opportunites & Threats in the Facilities Management Market 2009-2013

OPPORTUNITIES	THREATS
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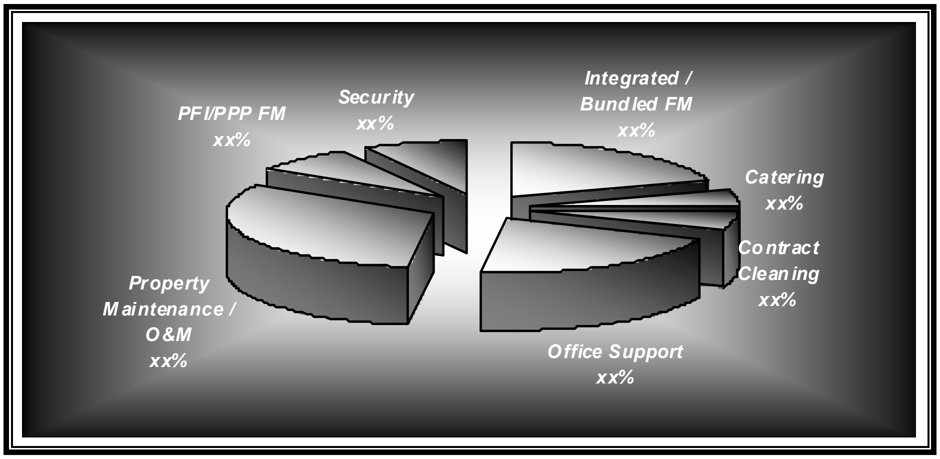
Report Sample

2.5FACILITIES MANAGEMENT PRODUCT / SERVICE MIX

2.5.1Share by Facilities Management Sector 2004, 2009 & 2013

The share accounted for by each of the key sectors within the UK Facilities Management market in 2009 is illustrated in the following chart:-

Figure 20: Share by Key Product Sector in Facilities Management Market 2009



Source: MTW Research / Trade Sources

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Report Sample

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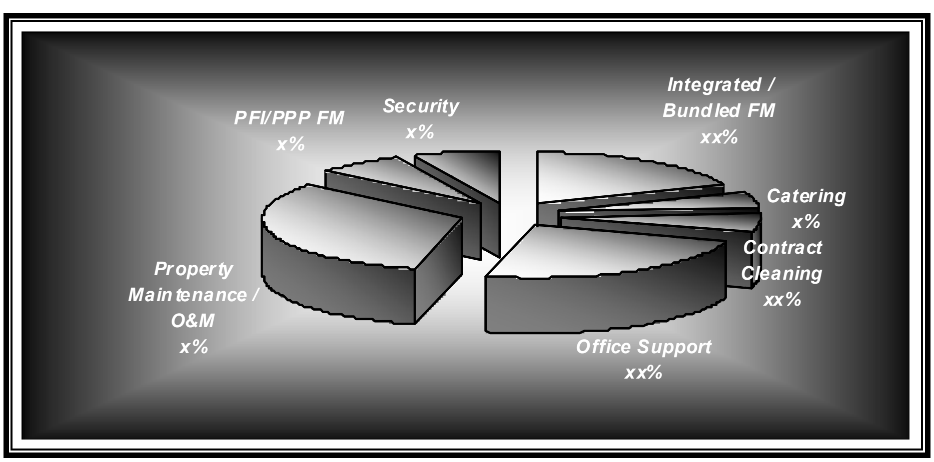
For comparison, the following chart illustrates the historical mix by value for each of the key sectors in 2004:-

Figure 21: Historical Share by Key Sector in Facilities Management Market 2004



Source: MTW Research / Trade Sources

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In terms of future prospects, the following chart illustrates our forecasts of the likely share for each sector in 2013:-

Figure 22: Forecast Share by Key Sector in Facilities Management Market 2013

Report Sample

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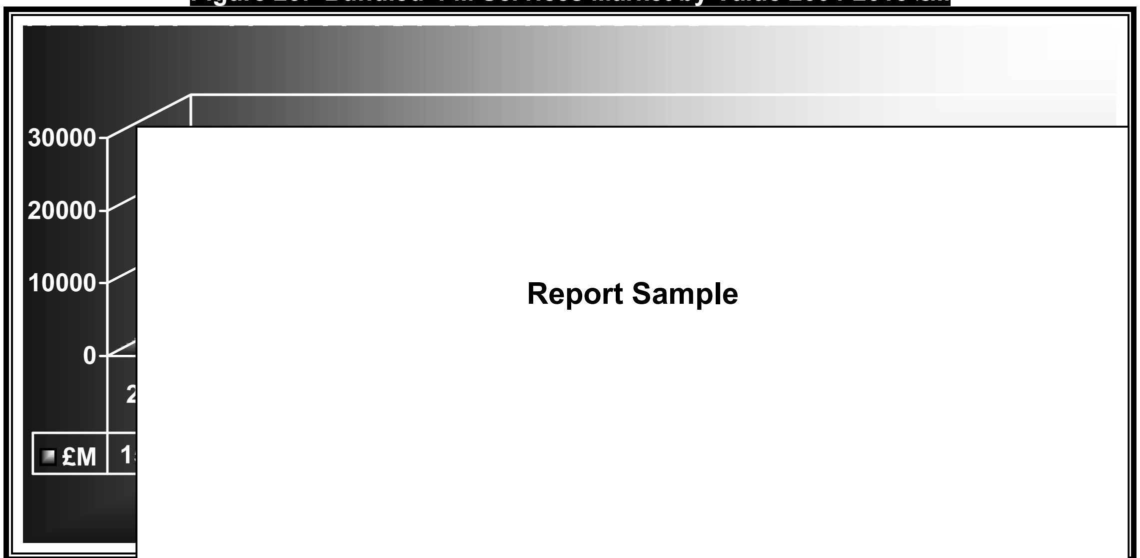
2.5.2Integrated FM / TFM Services Market Value 2004-2013

The following chart illustrates the performance of the 'bundled' FM sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: 'Bundled' FM Services Market by Value 2004-2013 £M



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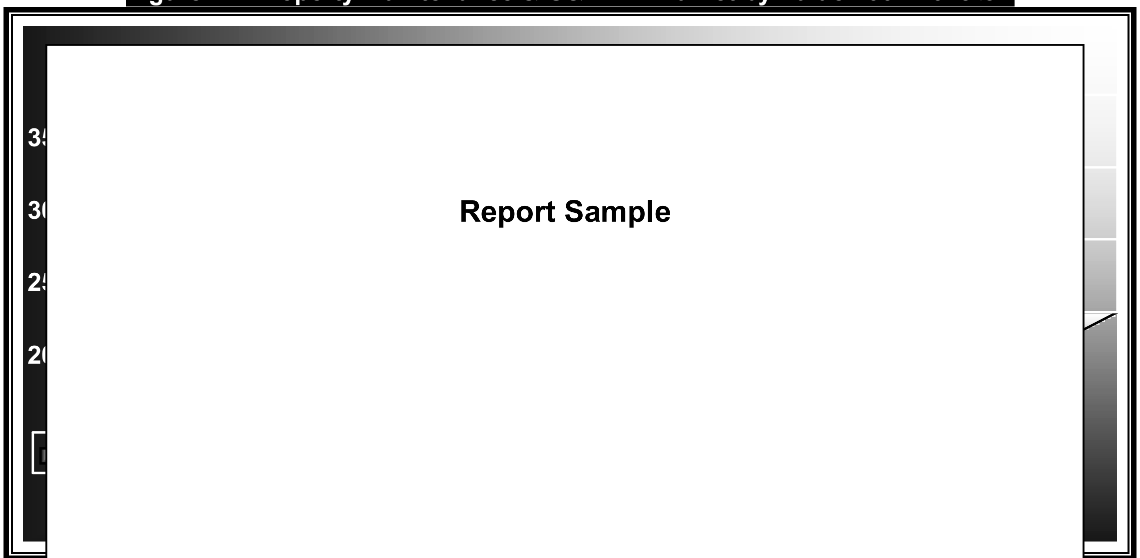
2.5.3Property Maintenance / O&M Market Value 2004-2013

The following chart illustrates the performance of the property maintenance and O&M sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 24: Property Maintenance & O&M FM Market by Value 2004-2013 £M



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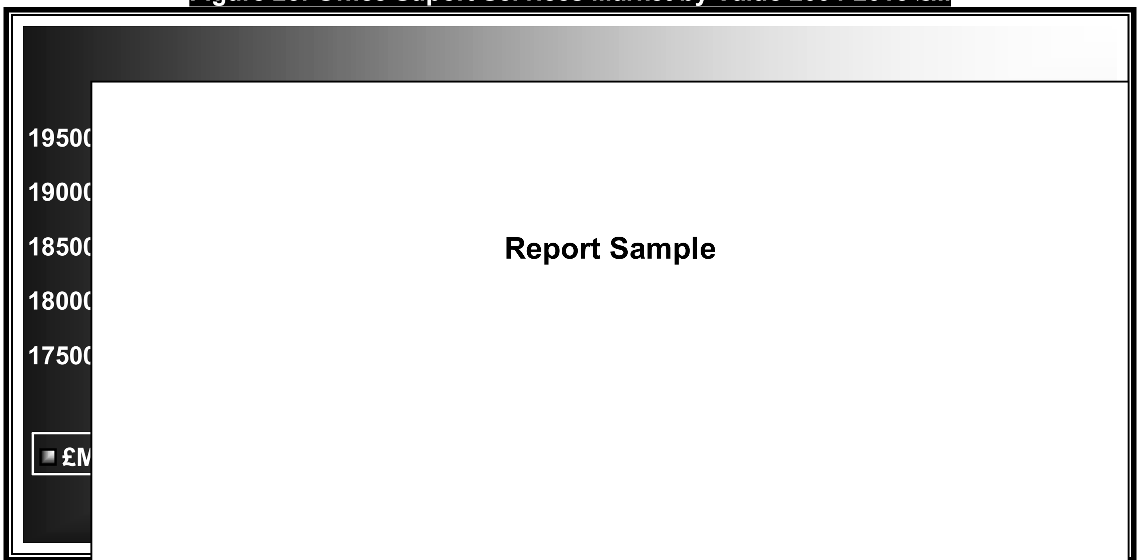
2.5.4Office Support Services Market Value 2004-2013

The following chart illustrates the performance of the office support services sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 25: Office Suport Services Market by Value 2004-2013 £M



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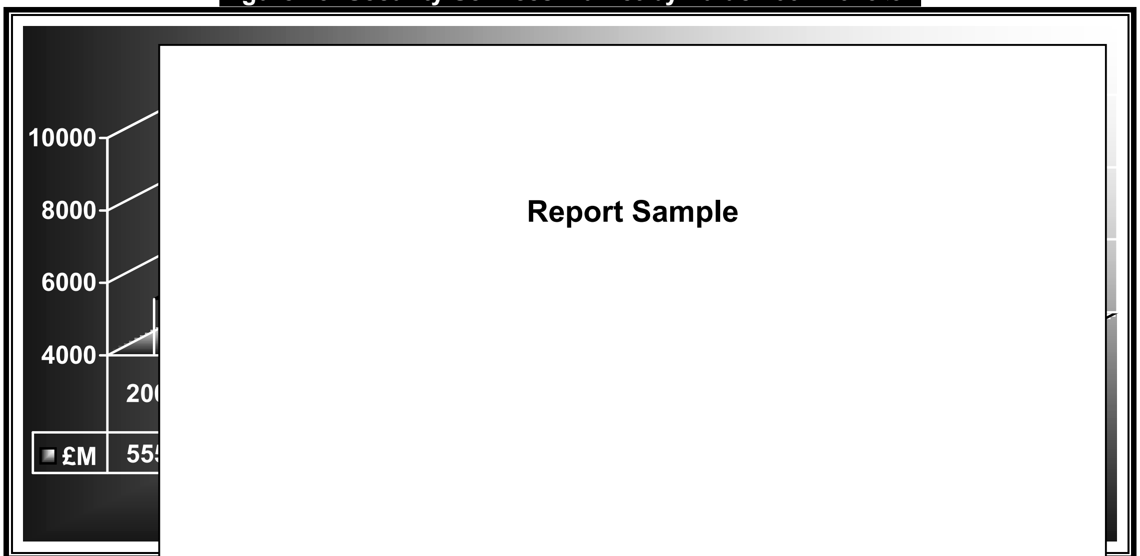
2.5.5Security & Access Control Services Market Value 2004-2013

The following chart illustrates the performance of the security services FM sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: Security Services Market by Value 2004-2013 £M



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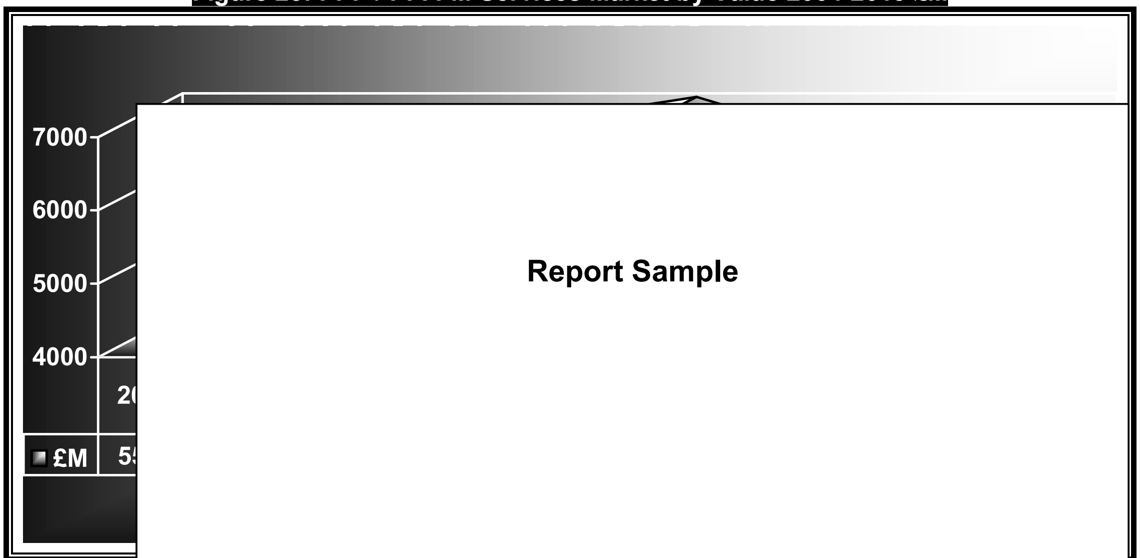
2.5.6PFI / PPP Facilities Management Market Value 2004-2013

The following chart illustrates the performance of the PFI / PPP FM sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: PPP / PFI FM Services Market by Value 2004-2013 £M



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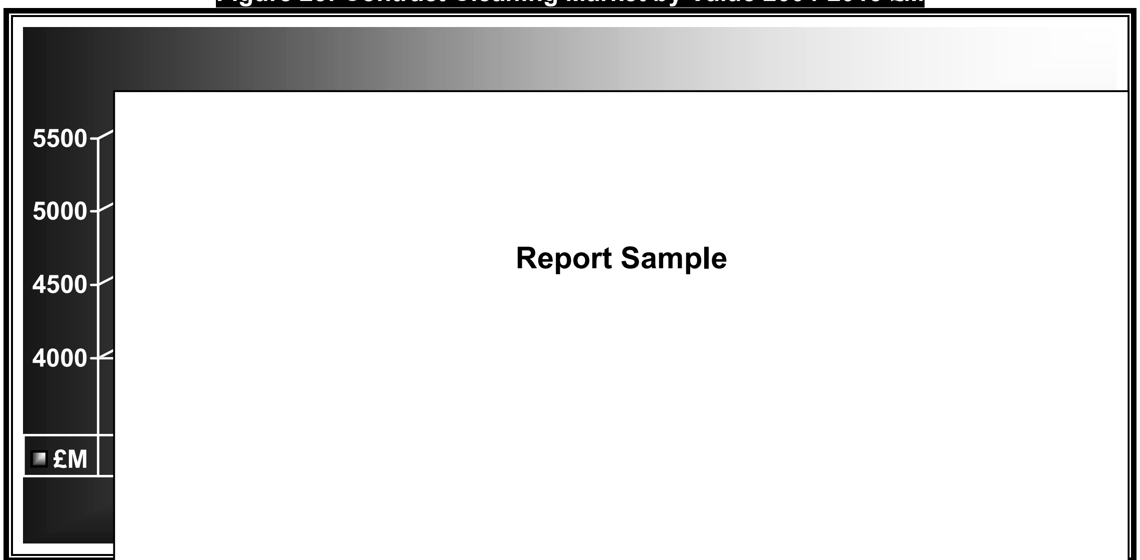
2.5.7Contract Cleaning Market Value 2004-2013

The following chart illustrates the performance of the Contract Cleaning sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: Contract Cleaning Market by Value 2004-2013 £M



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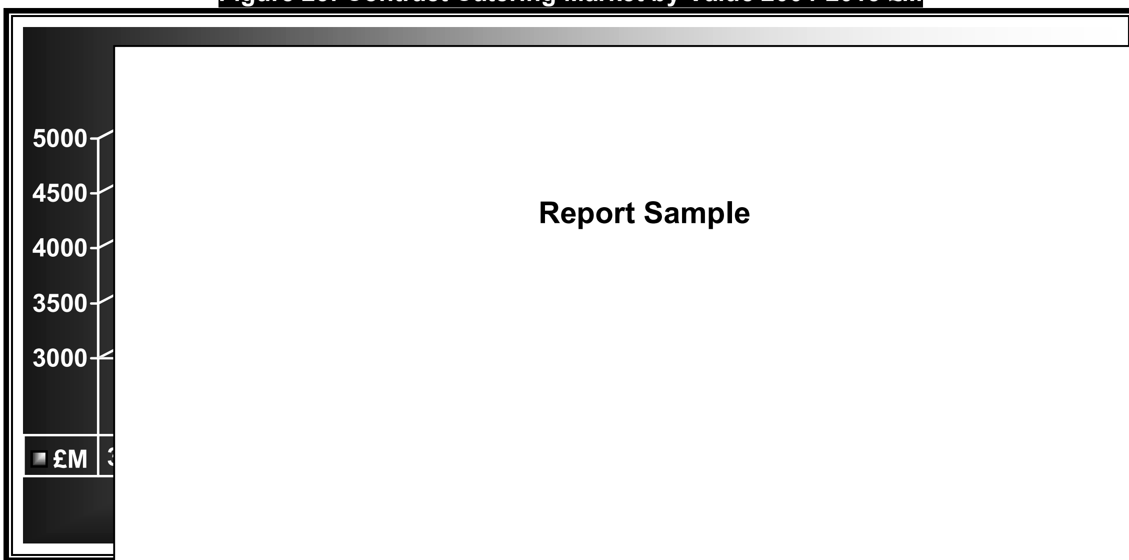
2.5.8Contract Catering Market Value 2004-2013

The following chart illustrates the performance of the Contract Catering sector of the Facilities Management market by value since 2004 and forecasts to 2013:-

Figure 23: Contract Catering Market by Value 2004-2013 £M



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2.6FACILITIES MANAGEMENT END USER / CHANNEL MIX

The following section identifies the key end use target markets for the UK Facilities Management industry and provides an illustration of historical market share in 2004, current share for 2009 and provides a forecast share for 2013.

2.6.1Share by Key End Use Market 2004, 2009 & 2013

The Facilities Management market comprises of a wide range of end use markets, each with varying levels of demand and key market influences within.

The following table illustrates our estimates of the current share accounted for by these sectors in 2009 by value:-

Figure 26: Share by Key End Use Sector in Facilities Management Market 2009

Report Sample

arch / Trade Sources

It should be no inition of the
above sectors a ble overlap
between the se nplexities in
terms of estima egarded as
guideline figure

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followed by the e markets
which combined have been
boosted in rece nd in particular
the Private Fina

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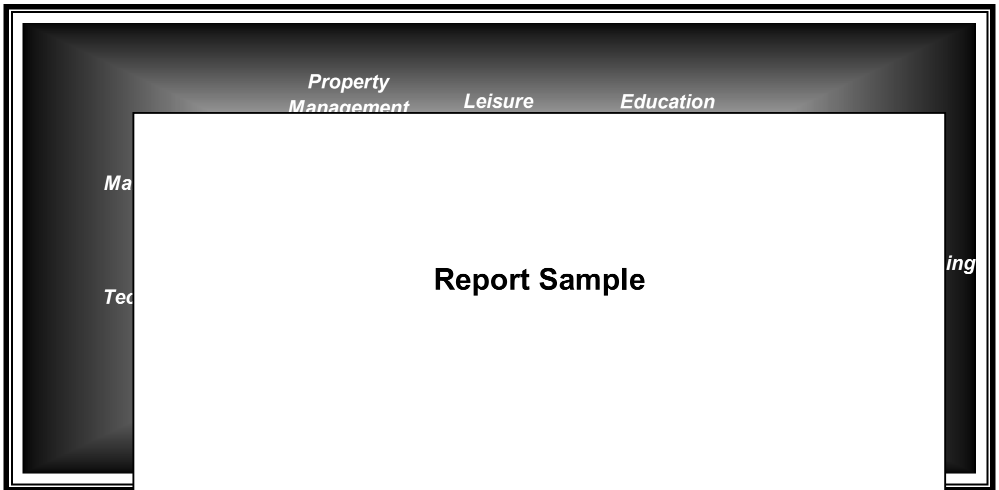
key customer g ccounting for
9% and 8% res largest client
groups fall with which account
for similar shar

In order to provide a comparison, the following chart illustrates the key sectors' estimated share of the Facilities Management market in 2004:-

Figure 27: Historical Share by Key End Use Sector in Facilities Management Market 2004



Report Sample

n / Trade Sources

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since 2004.

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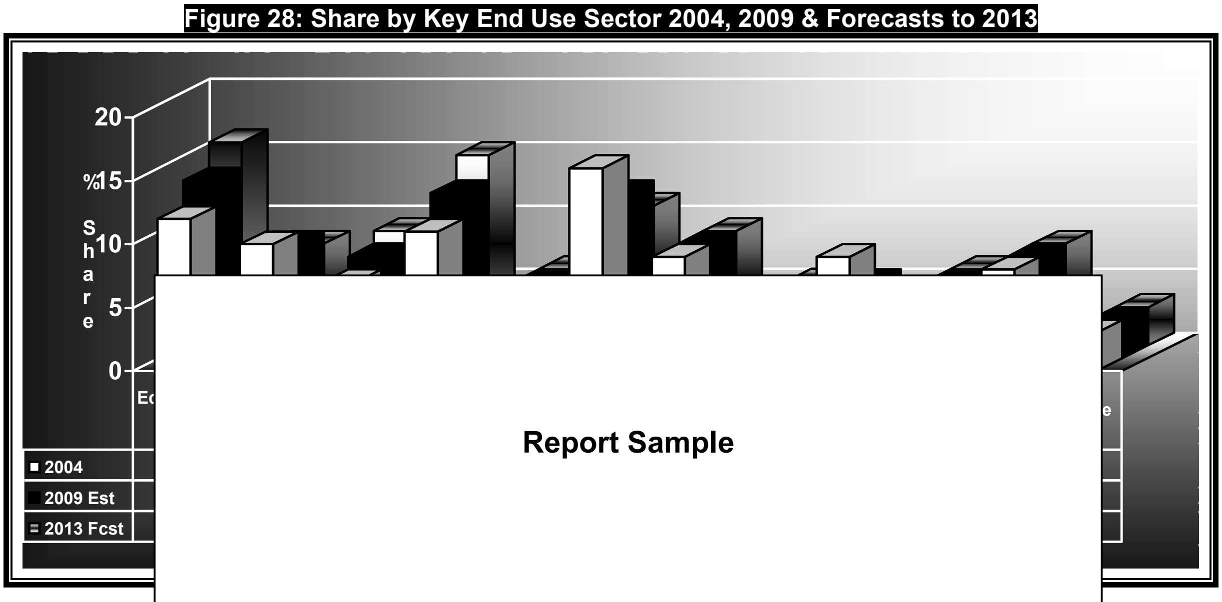
The following chart illustrates the historical and current shares of each of the key end use sectors, and provides a forecast share for each in 2013:-

Figure 28: Share by Key End Use Sector 2004, 2009 & Forecasts to 2013



Source: MTW Research / Trade Estimates

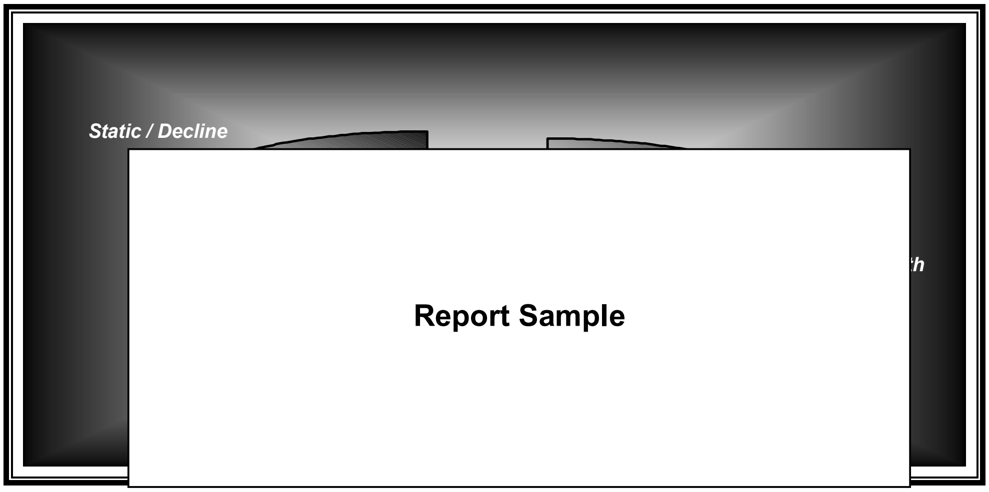
3. THE FACILITIES MANAGEMENT INDUSTRY

3.1Facilities Management Industry Structure in 2010

3.2.1 Industry Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 29: Market Share by Facilities Management Company Sales Growth / Decline 2009



Source: MTW Research / Company Accounts

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Report Sample

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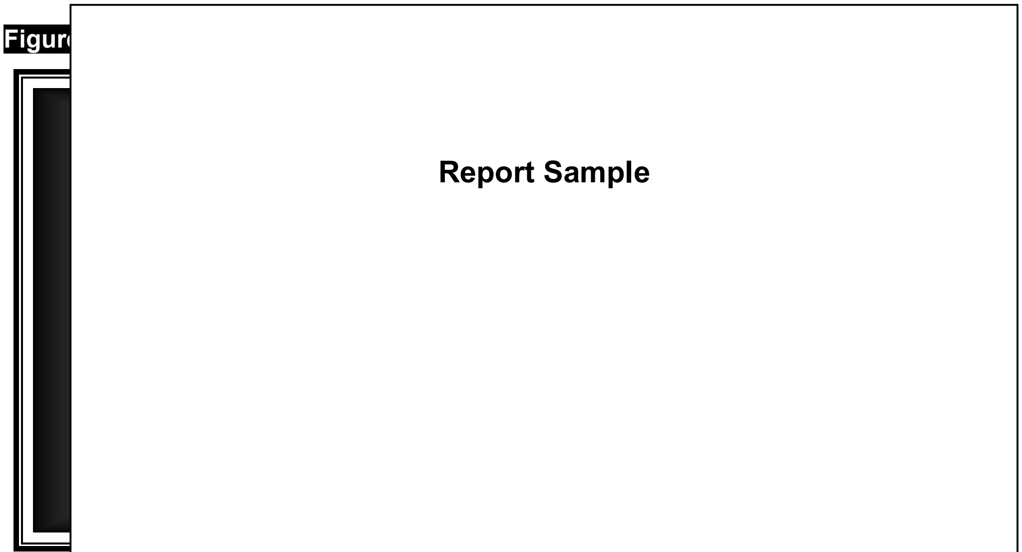
3.2.2 Industry Share by Credit Rating in 2010

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for by Facilities Management companies in terms of credit rating in January 2010:-

Figur



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3.2.3 Industry Mix by Age of Companies in 2010

The following chart illustrates the share by age of companies within the UK Facilities Management market as at January 2010:-

4. FACILITIES MANGEMENT COMPANY RANKINGS

4.1Facilities Management Companies Listing

The list below illustrates the key players reviewed in this section:-

Figure 36: Facilities Management Company Listing

Accuro FM
Acme Facilities Management Manchester
Active Facilities Management
Acuity Management Solutions
Amec Group
Amey UK Plc
Andron Contract Services
Aramark
Arneil & Johnston
Asm Facilities
Awg Group
Axcess Solutions
B.B.M Contracts
Babcock Dyncorp
Babcock International Group Plc
Babcock Support Services
Best Fit Business Solutions
Capita Group Plc
Carillion (Am) Limited
Carisway
Chartwell Facilities Management
Clarke Chapman
Clean Supreme
CMS Group
Cofathec Heatsave
Collsec Facility Services
Compass Group
Courier Facilities
Cross Services Engineering
Dalkia Plc
Derek Smith Electrical
Dove Services
SGMS Group
Eagle Facility Management Services
Ecovert FM
EFM Facilities
Elite Hygiene
Elite Services Environmental
Emcor Group UK
Engineering Support Services (ESS)
Enigma FMA
Enviro-Waste Limited
Europa Support Services
Estate Facilities Consultancy
Exact Corporation
F M. Support
Faceo FM Uk
Facilities & Move Management
Facilities Solutions
Facility Project Management
FES FM
First Services Facilities Management
Forward Facilities Management
G & S Facilities Management
G S H Group Plc
Gardiner & Theobald Facilities Management
Global House
G4S Regional Management
Globe Facilities
Guardian Consultancy Services
Balfour Beatty PLC (Haden Young & Haden Building)
Hardy Landscape Management
Haven Engineering Services
Haywards 2008
BAM Construct UK
Henry Boot Management
Hillyard Associates
Hochtief Facility Management UK
Hiro Facilities Management
Hs Facilities Management
Ice White
Inhouse Corporate Services
Integrated FM
Interactive Facilities Management
Interserve (Facilities Management)
Interserve Plc
Inviron Limited
IPM Facilities
ISS Facility Services
J J & B Projects
J P B Property Holdings
Jarvis Accommodation Services
Johnson Controls
JXB
Kellogg Brown & Root
Kier Support Services
Level Facilities Management
Maclellan International
Mailsource UK
Manchester Jetline
Matthew Watts Associates
Mitie Facilities Services
Monitor Facilities Management
Morrison PLC
Muller Professional Services
Neocrest Facilities Services
Network Resource Management
OCS Group UK
Operon
Outshine Facilities Management
Outsource Specialists
P S Facilities Management
Parsons Brinckerhoff
Peter Howell Facilities
Phosters Fs
Plan B Solutions
Product Procurement Services
Promanex Group
Q F S L Cleaning
Quadron Services
Quality Assured Facility Services
Quality Performance Management
RFM Group Services
Reliable Maintenance
Reliance Security Group
Rentokil Initial Facilities Services
Return Logistics
Risk Facility Management
Robertson Facilities Management
Rollright Facilities
Romec
Safetynet Solutions
Serco Group Plc
Skanska Rashleigh Weatherfoil
Sodexo Holdings
Spencer Cox & Partners
Staveley Industries
T F M S
Taylor Ridgway International
Terwyn
The Centre For Facilities Consultancy
Thomson FM
Triguard
Turner Estate Solutions
Tynewater Property Management
Vega Facilities Services
VFM Consultancy
Victoria House
Vinci PLC
Vogue Facilities Management
Watson Lennard & Payne
Williams Facilities Management
Workspace Solutions
WS Atkins Plc
WSP UK
ThyssenKrupp Services

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

4.2 Facilities Management Contractors Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 37: Facilities Management Companies Ranked By Turnover 2009

Report Sample

1	C	ervices
2	S	
3	C	
4	M	anagement
5	In	ent
6	B	
7	B	ment
8	W	ement
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12	A	
13	A	yne
14	B	
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18	A	anagement
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21	A	
22	K	
23	G	agement
24	Ki	
25	A	
26	R	ment
27	S	
28	E	
29	S	ational
30	M	tions
31	W	
32	P	es
33	B	
34	R	
35	H	ltancy
36	G	
37	M	
38	G	
39	In	
40	T	gement
41	C	
42	B	
43	E	rs
44	P	
45	M	Consultancy
46	Q	
47	E	es
48	Ja	
49	S	nagement
50	F	

Source: MTW Research / Trade Sources

4.2 Individual Turnover Estimates by Company

The following table illustrates the estimated turnover for each company for 2009:-

Figure 38: FM Companies Sales Estimates 2009

Report Sample

Trading Name	2009 Turnover	Trading Name	2009 Turnover
Co			£45.0
Se			£40.0
Ca			£38.0
Mo			£35.0
Inte			£31.4
Ba			£25.0
BA			£22.0
WS			£20.0
Vin			£17.0
Ca			£15.0
Mit			£11.5
Am			£9.0
As			£8.0
Bal			£8.0
Ax			£4.5
Joh			£4.3
OC			£4.0
Arr			£3.9
Dal			£3.5
ISS			£3.5
Ara			£3.4
Kel			£2.8
G4			£2.6
Kie			£2.5
Aw			£2.5
Rel			£2.5
So			£2.4
Em			£2.3
Ska			£2.0
Mo			£1.8
WS			£1.8
Pa			£1.5
Ba			£1.5
Re			£1.5
He			£1.5
G S			£1.5
Ma			£1.4
Ga			£1.4
Ma			£1.4
Inv			£1.3
Tu			£1.3
Co			£1.2
Ba			£1.2
Ec			£1.0
Pr			£1.0
Ma			£0.8
Qu			£0.8
Eu			£0.7

Trading Name	2009 Turnover	Trading Name	2009 Turnover
Ice			£0.2
IP			£0.2
Ma			£0.2
En			£0.2
Gl			£0.2
Ha			£0.2
JX			£0.1
Pe			£0.1
Ch			£0.1
Ris			£0.1
Te			£0.1
Hi			£0.1
Le			£0.1
Ou			£0.1
Qu			£0.1
Re			£0.1
Th			£0.1
Wa			£0.1
B.			£0.1
Int			£0.1
Int			£0.1
Ty			£0.1
Vo			£0.1
Ac			£0.1
Ma			£0.1
Do			
Fa			

Report Sample

Source: MTW Research / Trade Sources

4.3 FM Companies Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the FM providers in 2009:-

Figure 39: Facilities Management Companies Ranked By Profit 2009

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7	E		ces
8	V		rvices
9	Y		
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11	M		
12	A		ing
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15	A		
16	J		tions
17	C		
18	A		nt
19	D		ces
20	I		
21	A		gement
22	K		
23	C		
24	K		
25	A		gement
26	F		
27	S		ces
28	E		
29	S		
30	M		
31	V		
32	F		
33	E		
34	F		
35	H		nent (Uk)
36	C		
37	M		
38	C M		
39	I		
40	T		ent Services
41	C		
42	E		
43	E		
44	Promanex Group	[illegible]	Clarke Chapman

Report Sample

Report Sample

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91	Ac	
92	St	gement
93	Eli	
94	Ou	
95	Ha	ent
96	Ice	
97	IP	
98	Ma	tional
99	En	ions
100	Gl	
101	Ha	s
102	JX	
103	Pe	
104	Ch	ltancy
105	Ri	
106	Te	
107	Hi	
108	Le	Management
109	Ou	ement
110	Qu	anagement
111	Re	s
112	Th	
113	W	s Consultancy
114	B.	
115	Int	s
116	Int	
117	Ty	agement
118	Vo	

Source: MTW Research / Company Accounts

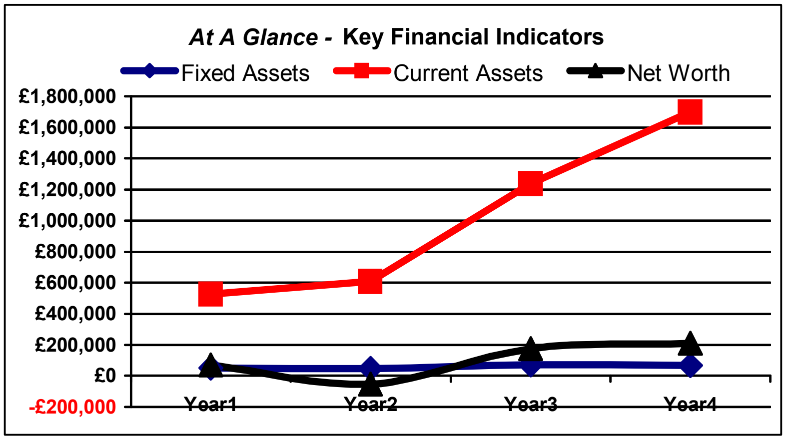
4.4 FM Companies Ranking by Assets

The following table illustrates our estimates of the rank by total fixed and current assets for each company in 2009:-

5. FM CONTRACTOR PROFILES & *'AT A GLANCE"*

Sample Sample Ltd - Company Overview & *'At a Glance'*

Sample Address
Sample Address
Sample Address
Tel: Sample



Sample Ltd is a private limited with share capital company, incorporated on January 4, 1999. The company's main activities are recorded by Companies House as "Facilities management, project management and consultancy." In early 2010, the company has an estimated 60-70 employees.

To year end 31/03/2008, Sample Ltd is estimated to have achieved a turnover of around £8.0 million. Pre-tax profit for the same period is estimated at around £0.4 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Facilities management, project management and consultancy.
Parent Company	Sample HOLDINGS LTD.
Ultimate Holding Company	Sample PUBLIC LIMITED COMPANY (THE)
Estimated Number of Employees	60-70
Senior Decision Maker / Director	Sample

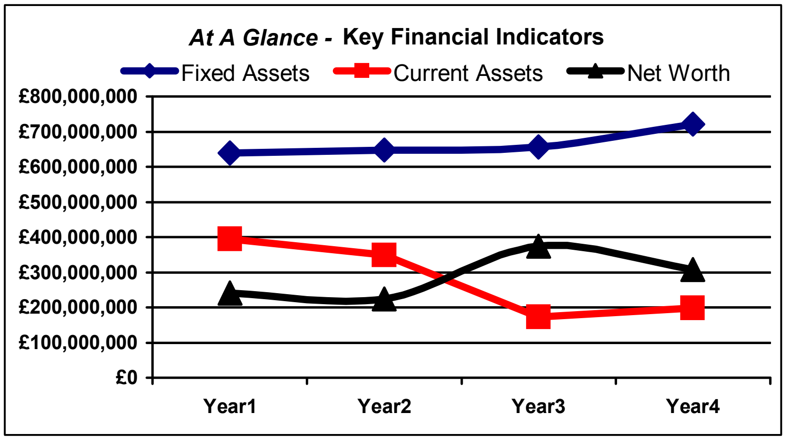
The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Ltd - 4 Year KPIs to Year End 31/03/2008

Key Indicator £	Year End 31/03/2005 (Year1)	Year End 31/03/2006 (Year2)	Year End 31/03/2007 (Year3)	Year End 31/03/2008 (Year4)
Fixed Assets	£52,000	£48,000	£69,000	£66,000
Current Assets	£526,000	£610,000	£1,241,000	£1,698,000
Current Liabilities	£500,000	£708,000	£1,133,000	£1,554,000
Long Term Liabilities	£7,000	£2,000	£0	£0
Net Worth	£71,000	-£52,000	£177,000	£210,000
Working Capital	£26,000	-£98,000	£108,000	£144,000
Profit per Employee	£2,083	-£2,133	£719	£662
Sales per Employee	£59,542	£62,844	£84,719	£106,310

Sample Group Ltd - Company Overview & *'At a Glance'*

Sample Address
Sample Address
Sample Address
Tel: Sample



Sample Group Ltd is a private limited with share capital company, incorporated on December 9, 2002. The company's main activities are recorded by Companies House as "Design capabilities, project management and constructions skills in the manufacturing, infrastructure and process industries and provision of services to oil and gas, utilities and electric services." In early 2010, the company has an estimated 6526 employees.

To year end 31/12/2008, Sample Group Ltd is estimated to have achieved a turnover of around £941.0 million. Pre-tax profit for the same period is estimated at around £43.6 million.

The following table briefly provides a top line overview on Sample Group Ltd:-

Company Name	Sample Group Ltd
Brief Description of Activities	Design capabilities, project management and constructions skills in the manufacturing, infrastructure and process industries and provision of services to oil and gas, utilities and electric services.
Parent Company	Sample PLC
Ultimate Holding Company	Sample PLC
Estimated Number of Employees	6526
Senior Decision Maker / Director	Sample Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Group Ltd - 4 Year KPIs to Year End 31/12/2008

Key Indicator £	Year End 31/12/2005 (Year1)	Year End 31/12/2006 (Year2)	Year End 31/12/2007 (Year3)	Year End 31/12/2008 (Year4)
Fixed Assets	£639,441,000	£648,564,000	£656,191,000	£720,841,000
Current Assets	£394,545,000	£348,100,000	£171,948,000	£198,717,000
Current Liabilities	£515,744,000	£515,523,000	£223,297,000	£230,246,000
Long Term Liabilities	£277,993,000	£257,333,000	£229,872,000	£382,348,000
Net Worth	£240,249,000	£223,808,000	£374,970,000	£306,964,000
Working Capital	-£121,199,000	-£167,423,000	-£51,349,000	-£31,529,000
Profit per Employee	-£6,582	-£2,793	£20,532	£1,739
Sales per Employee	£149,257	£159,550	£136,770	£144,256