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The U.S. Janitorial Services Industry

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Abstracts

This Marketdata study examines the huge and mature $52 billion U.S. commercial janitorial services market that employs nearly 1 million. The business is very competitive, comprised of 765,000 mainly small operators, including 44,000 franchised outlets. Competitors run the gamut from mom & pop cleaners, to giants such as ABM Industries with $2.4 billion in revenues and ServiceMaster Clean with $2.1 billion. This study traces the industry's size, growth, end-user segments, structure, factors affecting demand, and operating ratios — Receipts for 1987-2012 actual, 2013-2014 estimates, and 2018 forecasts.

Steady sales gains came to a halt in 2009 with the Great Recession, real estate bust, rising office building construction and vacancy rates, and cutbacks in the frequency of cleaning by clients. Some customers even shifted to in-house cleaning. The industry has rebounded since 2011 but has been undergoing significant change. Worker turnover is still high, there's pressure to raise wages, franchise sellers are under fire for unscrupulous practices, consolidation is speeding up as the older generation of owners/managers retires, there is uncertainty over the effects of Obamacare, and "green cleaning" and OSHA and ISO certification has become more important. However, cleaning contractors that are adept at specialized niches can still do well.

This is a complete analysis of: industry size and structure, competitors, major industry trends, franchising, office and industrial building vacancy rates, impact of the last recession, cleaning worker pay/turnover, outsourcing, and more. Includes highlights of latest surveys by trade journals, as well as comments and outlooks by top competitors, trade groups and industry consultants. National, state and city ratios from Census Bureau, BLS, NAR, BSCAI and other surveys. Includes in-depth profiles and rankings of all the top franchises and non-franchise competitors.

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ABM Industries
Anago Cleaning Systems
Bonus Building Care
Clean Net USA
Coverall North America
Jan-Pro Intl.
Continued:
Jani-King Intl.

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Pritchard Industries
Red Coats
ServiceMaster (incl. ServiceMaster Clean)
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Addresses, phones, contacts at major cleaning industry trade associations, trade journals, consulting firms, stock analysts.

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