THE U.S. JANITORIAL SERVICES INDUSTRY

October 2014

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* Labor productivity ratios: 2012  
* Discussion of **Non-employer receipts** (sole proprietorships without payrolls) IRS data 2012  
* Major findings of **2014 CMM Magazine survey**: type services provided by cleaning contractors, labor costs, profit margins, share of revenues by building type.  
* Summary & analysis: no. of cleaning establishments in U.S. and for leading states; no. of firms; industry size; avg. receipts per office by top states; mkt. share top 50 firms ratios; summary findings of 2007 Census re: legal form of organization, firms & estabs. by sales size (in receipts & employment); single/multi-unit operations.  
* Summary statistics: 1997, 2002, 2007, 2012 - no. of estabs; total industry vs. disinfecting/pest control, other services; annual receipts; payroll costs; no. of workers; payroll per employee; receipts per employee, receipts per establishment.  
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* Analysis of avg. initial franchise fees/royalty rates/start-up costs
* The industry's leading franchisers: parent co. vs. systemwide revenues, avg. estimated annual receipts, difficulties estimating revenues due to full-time vs. part-time workers; franchise investment pkgs. sold.
* Discussion of recent problems with franchises, misrepresentation of earnings, churning of accounts, territory encroachment, lawsuits and Atty. General actions against Jani-King, Coverall, Bonus Bldg. Care, Stratus Building Solutions. Why franchises are not as popular vs. several years ago as a career option.

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- The major commercial cleaning franchises, by no. of units: 2008-2013.

Profiles of The Leading Commercial Cleaning Franchises & Non-Franchise Firms
(For each company below: discussion & analysis of services offered, divisions, franchise packages offered/cost, markets served; strategies, 2010-2013 sales when avail., history & recent developments; acquisitions, number of franchises active; marketing strategies)

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

* Jani-King Intl.
* Pritchard Industries
* Red Coats
* ServiceMaster (incl. ServiceMaster Clean)
* Stratus Building Solutions
* UGL UNICCO Services

**Reference Directory of Industry Information Sources**

* Addresses, phones, contacts at major cleaning industry trade associations, trade journals, consulting firms, stock analysts.