

IC Market Tracking Facility Services in Western Europe 2018

- France
- UK
- Netherlands
- Belgium
- Italy
- Spain

Your Benefits at a Glance

- ✓ Overview of the development of the **Total Market** and the **Individual Segments**.
- ✓ **Market Forecasts** for all product segments and regions for the upcoming three years, based on our econometric models.
- ✓ **Market Shares** and development of Top Players in the last two years and with respect to:
 - Total Market
 - Service Types: Technical FM, Entrepreneurial FM, Infrastructural FM
 - Customer Segments
- ✓ Information about the most important **Market Drivers**
- ✓ Overview of **Development of Segments** and **Market Positioning**
- ✓ Graphic Presentation of the results facilitates the development of your own strategies.
- ✓ Pivot (excel tables) with company market shares by country, regions and segments for an interactive research.



Facility Services in

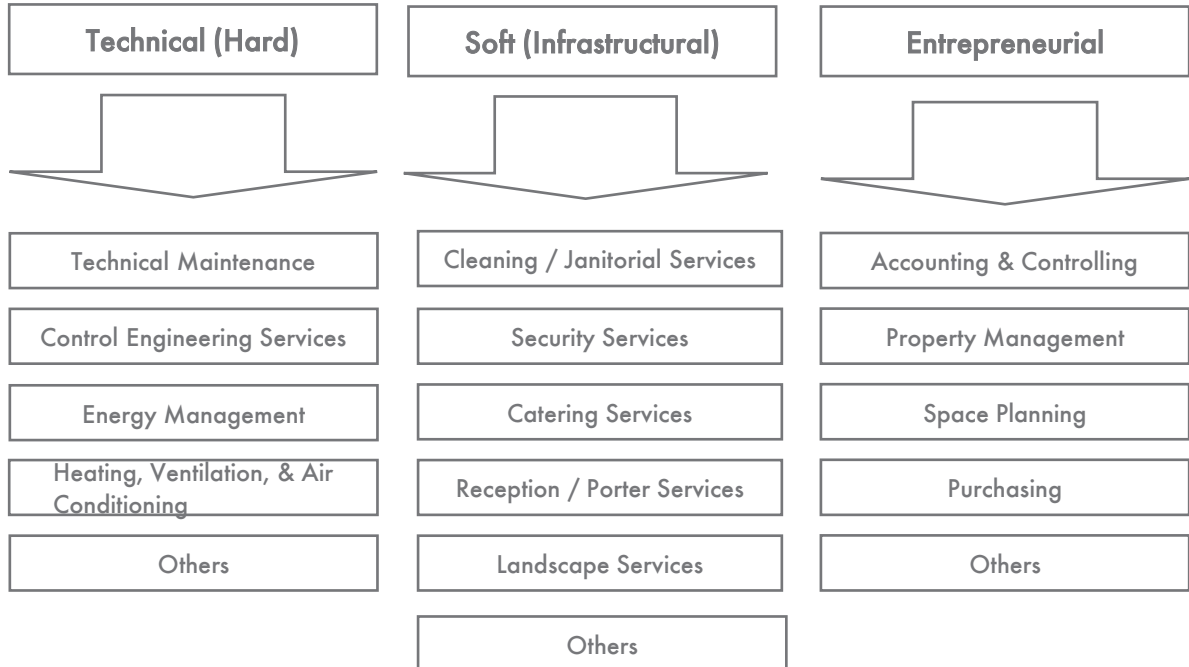
- France*
- UK*
- Netherlands
- Belgium
- Italy
- Spain
- Others on Demand

* Currently available

Customer Segments

- Industry
- Commercial
- Retail
- Healthcare
- Government & Education
- Transport
- Sports & Entertainment
- Others

Service Types & Sub-Service Types



For all segments the „external Facility Services Market“ is used as a basis. However we also provide information, how big the overall total market (internal +external services) is.

Definition and Demarcation

Service Types

Technical (Hard)

HVAC, Controls & Automation, Electrical Engineering, Energy Management, Technical Maintenance, etc.

Soft

Janitorial Services, Cleaning, Security, Catering, Waste Disposal, Snow Removal, Pest Control, Landscaping, etc.

Entrepreneurial

Controlling, Property Management, Logistics, Space Planning, etc.

Abbreviations

CAGR

Compound Annual Growth Rate over the period 2017 - 2021

Avg. Share

Average Share over the period 2017 - 2021f

2018e/2021f

Estimated/Forecasted

Turnover

Turnover is stated in 1 Mio. Euros. Values are always net turnover values (not list-prices), including rebates.

Contract Types

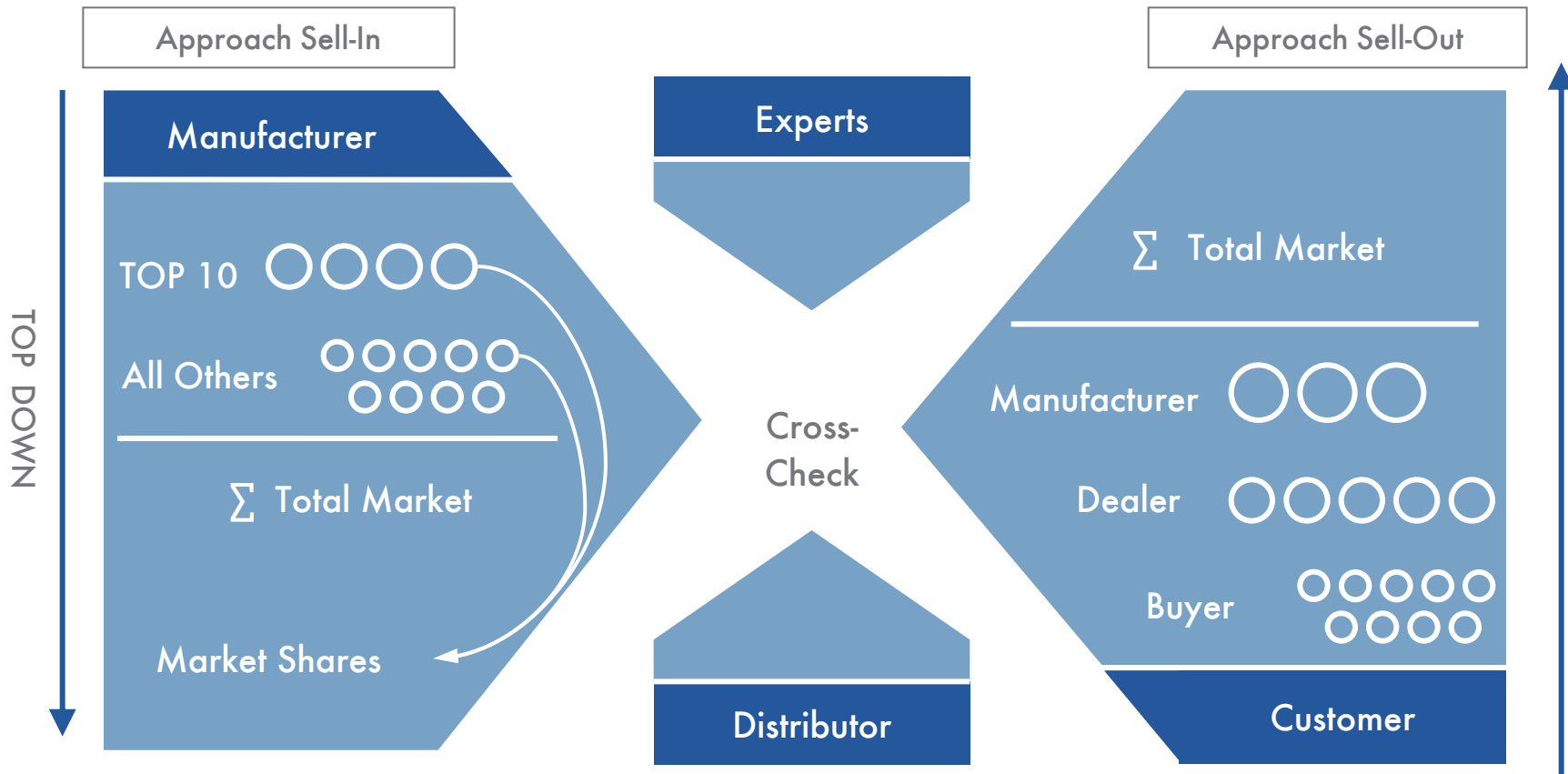
Internal

Own company

External

Subcontracting

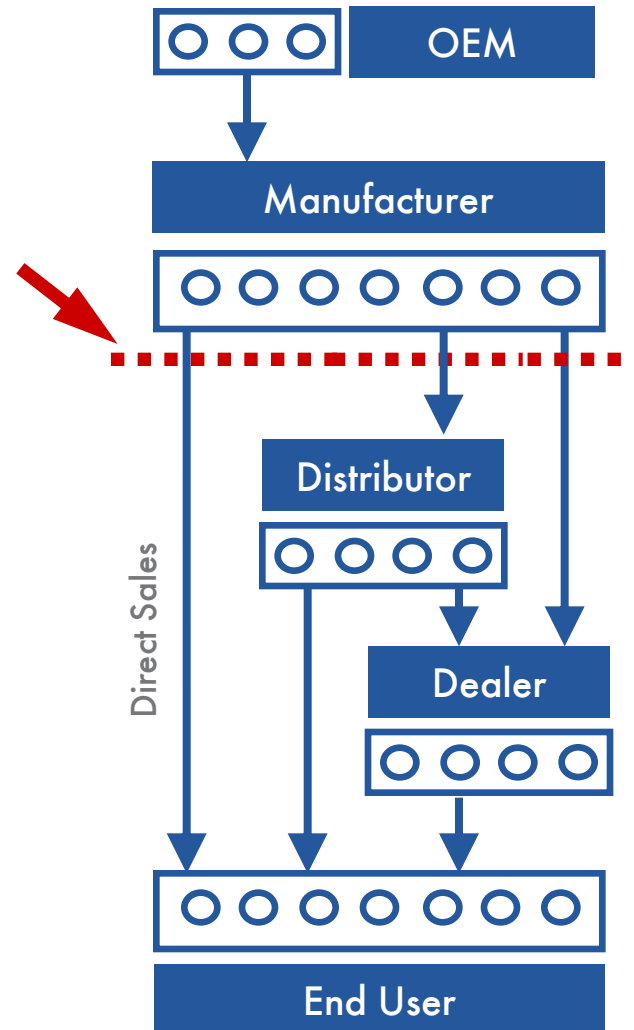
How Do we Cross Check the Data?



What Do We Measure in Our Reports?

Interconnection measures the total sales at street prices without VAT per branch to the first buyer (without OEM)

Sales are segmented by the first distribution partner.



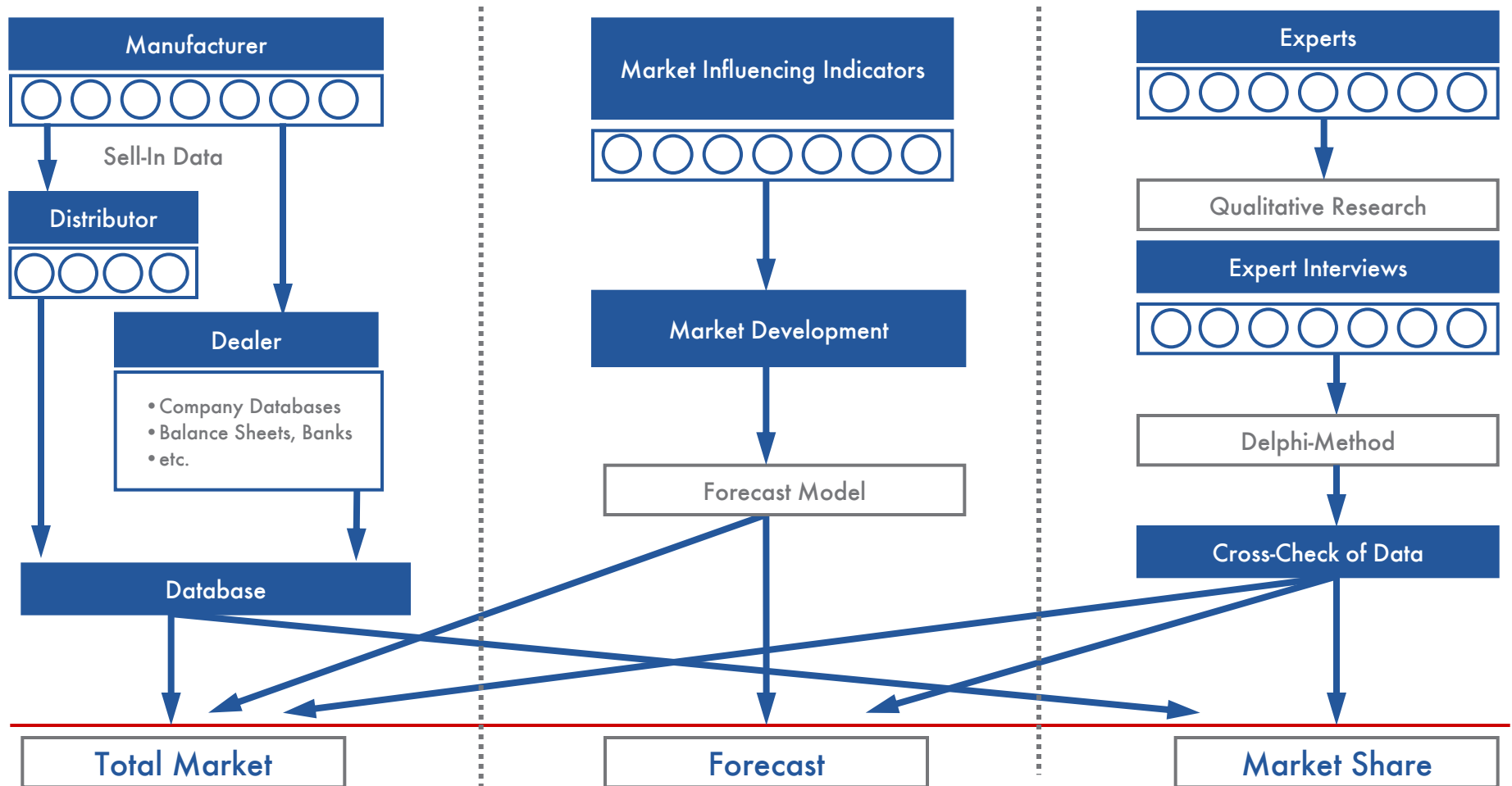
The basis for the analysis were interviews conducted with the most important manufacturers of the branches, who donated information through written questionnaires or telephone interviews. In return, cooperating companies receive parts for free, which guarantees a high rate of return.

Interviews with distributors and specialised dealers act as a cross-check of the data. In addition, investigations of listings and average prices are carried out.

How Do We Conduct Our Research?

Description Structure of Survey Methodology

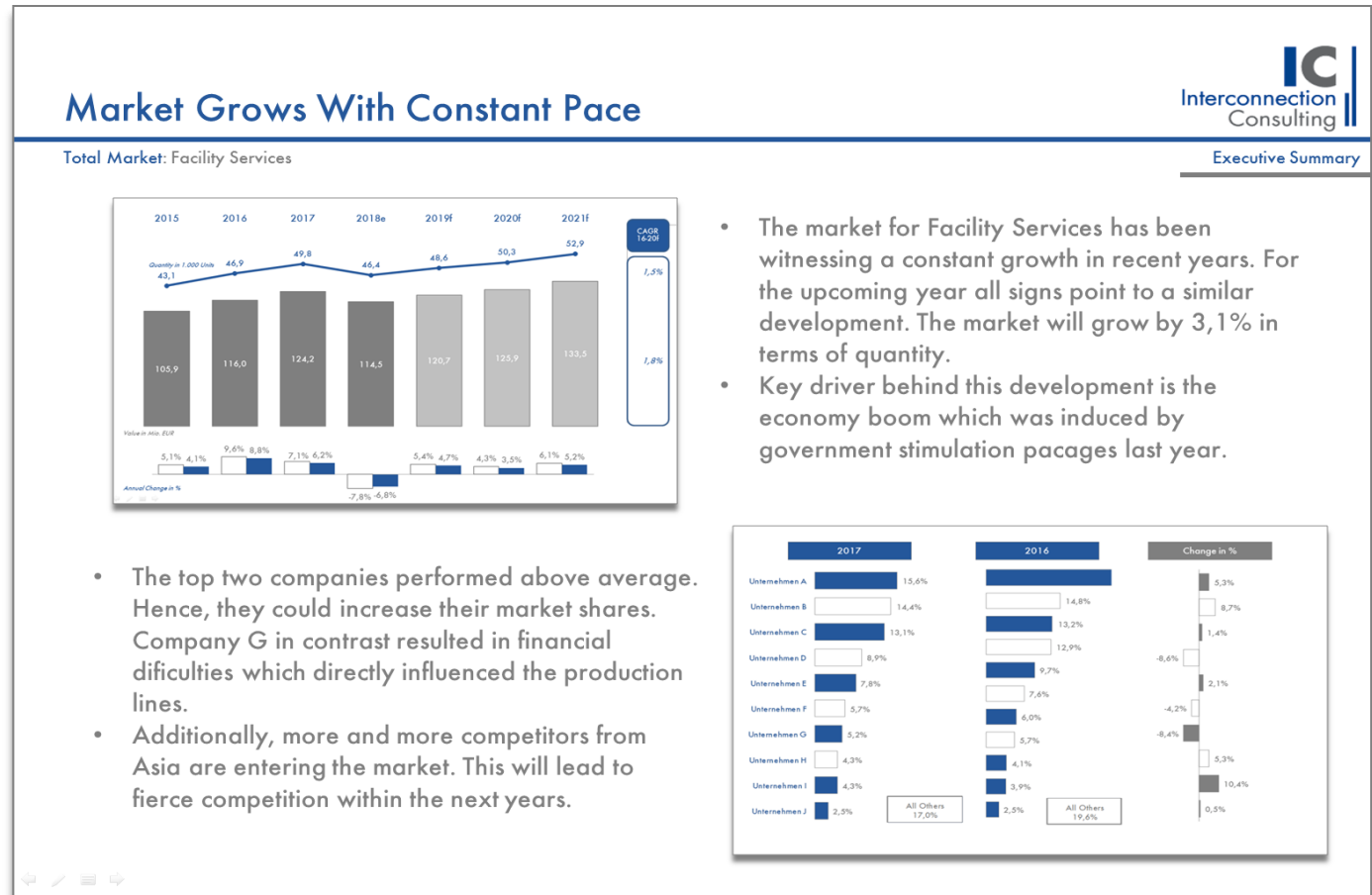
Methodology



The IC Market Tracking® is modularly built and consists of the following sections:

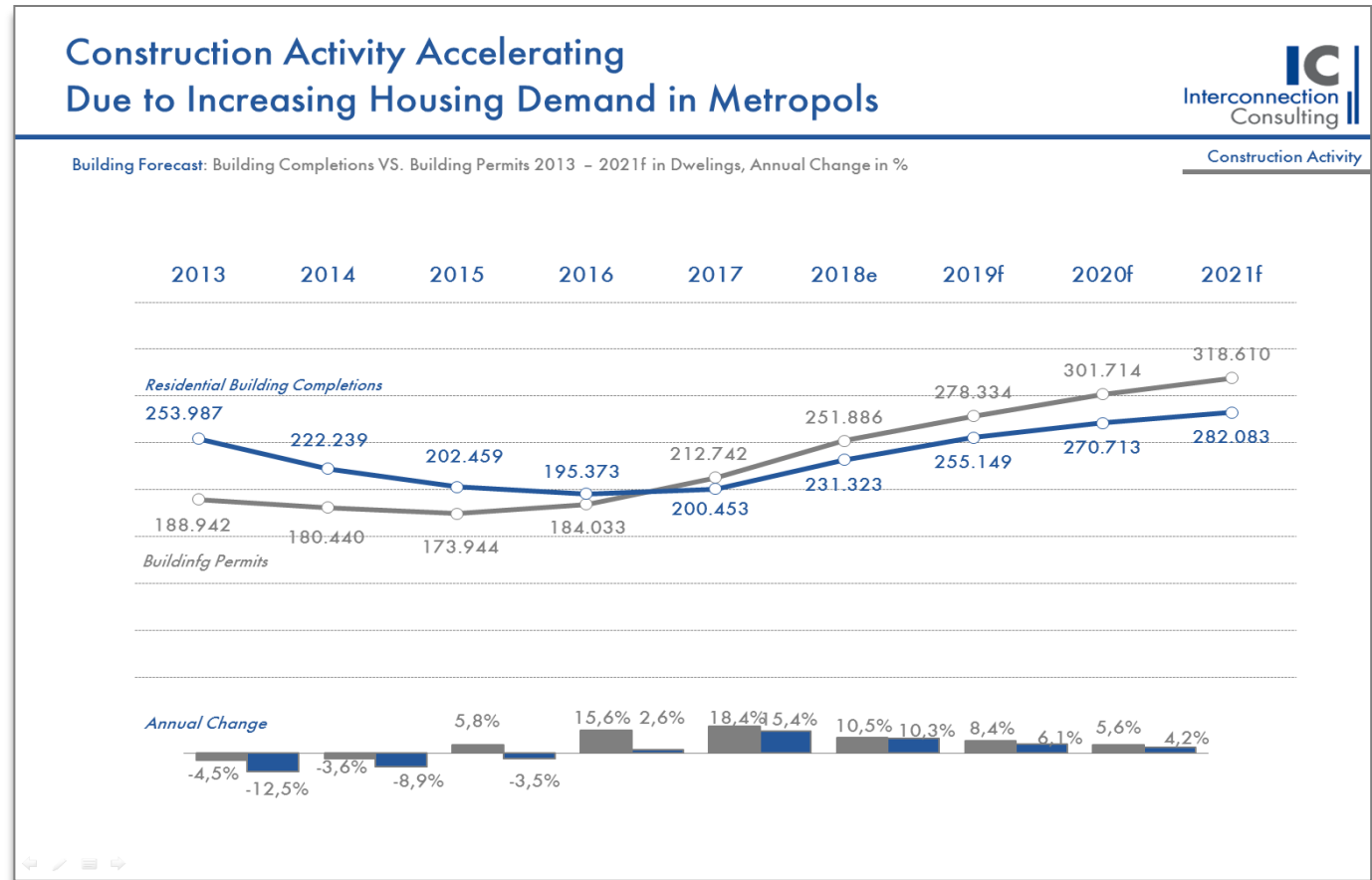
- The **Introduction** shows the definition and demarcation of services, sub services, regions, and methodology as well as the objectives of the study.
- The **Executive Summary** gives a short overview of the results of the study and analyses key facts.
- As an introduction key factors influencing the market of facility services are analysed in the **Economic Environment**: You will find the most important data on construction, commercial sector etc.. As well the main economic indicators influencing the market.
- The **Total Market Analysis** shows the development of the market surveyed by value and quantity in different dimensions, such as, services, sub services, regions and product groups. A forecast for the next years is an essential part of this analysis.
- The **Competition Analysis** shows in detail the development of the top companies within the facility services market by finding out about the market shares in different categories, changes in market position, benchmarks, average prices, etc.
- By using several analytical tools, we also carry out a **Strategy Analysis**: We show the strategic position through Efficiency-portfolios, BCG-Portfolios, Interconnection Dynamic-Portfolios, etc. Thus you can evaluate the strategic position of the main competitors at a glance.
- Finally, all data are documented in the table section, also called **Facts & Figures**. Here you will find all absolute and relative sales figures of the top companies in order to check our results.

- The executive summary comprises all relevant information of the report in precise manner. Forecast and
- competition situation is highlighted
- *This chart shows dummy figures.*



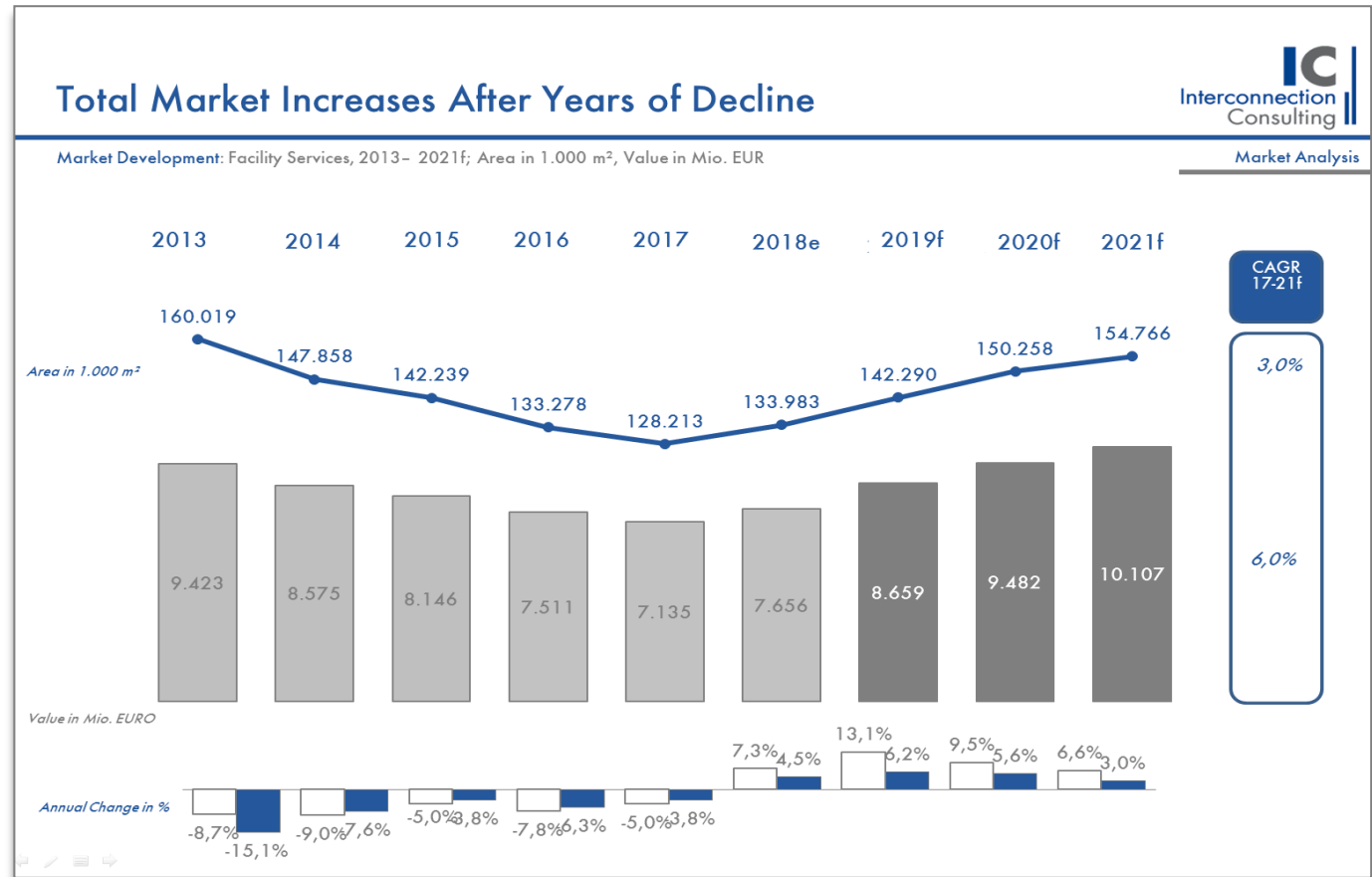
Market Environment Data of Our Forecasting Model

- The data for the market environment consists of main factors such as general economy data, demography, income statistics, construction environment and sentiment indicators.
- *This chart shows sample figures.*

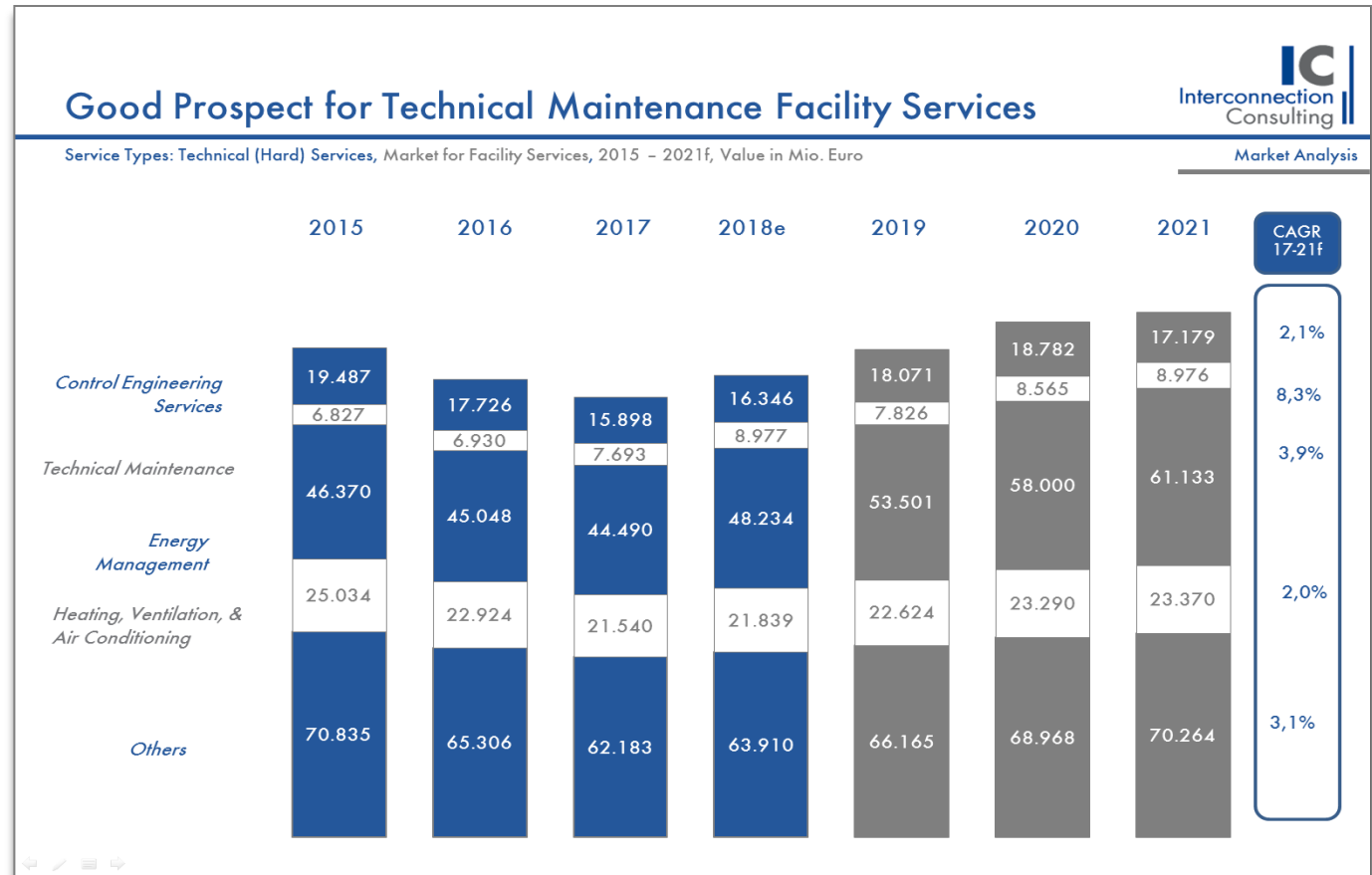


Total Market Development and Forecast

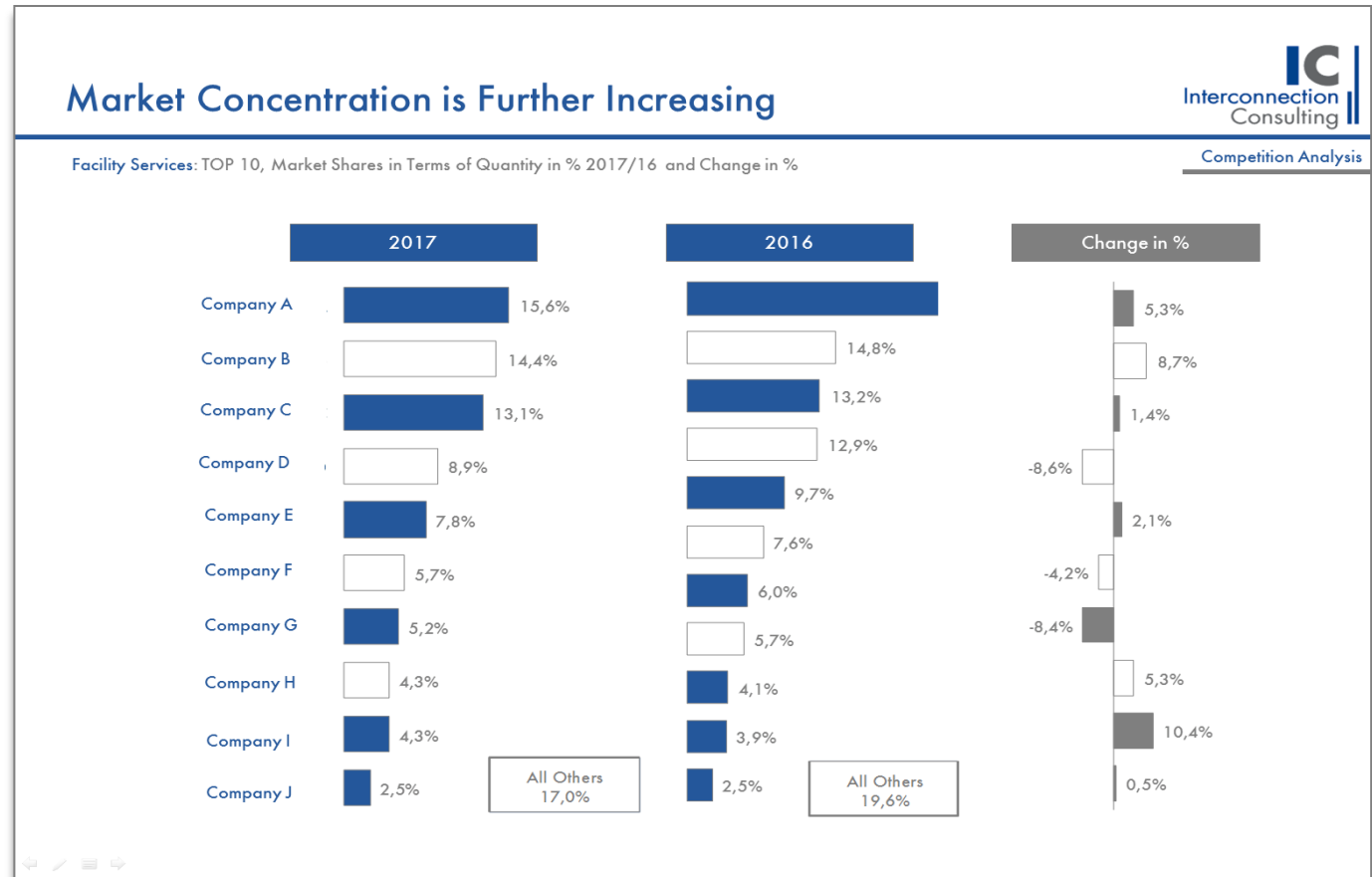
- Overview of the total market in terms of quantity and value
- Development until the current year and forecast for the upcoming three years
- *This chart shows dummy figures.*



- Overview of the Product Group Segmentation, Distribution Channels as well as a Forecast for the upcoming three years about their development.
- *This chart shows dummy figures.*



- Detailed description of the most important Companies in the examined market by reference to market shares, changes, BCG-Portfolios, etc.
- *This chart shows dummy figures.*



- Additionally to the visualised report a Pivot Table will be included
- With use of the analyse tool you can individually make selections of the available data to make comparisons of the development on years and segments by your own.
- Pivot tables are available for the competition analysis as well as for the total market and forecasts.

How to use Pivot Tables

1. Generally, the desired sub-categories (i.e. Technology - A) can be selected with the ordinary drop down menus.

Technology	A
Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	
Segments	Results
Segment A	18.592
Segment B	8.434
Segment C	5.310
Segment D	3.290
Segment E	1.332
Total	36.958

2. If you want to analyse a different category (i.e. Technology), click on the gray field and drag it down to the table.

Distribution	(All)
Quarter	4
Quantity/Value	Quantity
Weight Classes	(All)
Country	Germany
Brand	(All)
∅ Price in € (Classes)	(All)

Sum - #	Technology		
Segments	A	B	C
Segment A	3.290	5.452	7
Segment B	5.310	8.925	21
Segment C	8.434	10.794	
Segment D	18.592	14.624	13
Segment E	1.332	2.229	6
Total	36.958	42.025	47

	Single Issue	IC Subscription *	Scale of Discounts	
Single Region	€ 3.950,-		€ 5.000	-5%
All Countries **	€ 18.960,-		€ 10.000	-10%
			€ 15.000	-20%

Available Countries	France*	UK*	Netherlands	Belgium	Italy	Spain	Others on Demand
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* Currently available

* **IC Subscription:** 20% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year. The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December.

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- **Flexible subscription packages**: 2-year intervals, alternating countries, product change, etc., if possible. Conditions on request
- **Easy termination**: After 2 issues each subscription can be terminated easily


Interconnection Delivers Data for Company Decisions

- Interconnection is one of the leading institutes for market data in the facility services industry.
- Our studies support the leading companies in defining targets and marketing strategies, including competition monitoring and control of marketing actions.
- Interconnection draws its Know-how from over 100 international market studies per year and a number of Ad-hoc studies in several industries.
- Next to market data we offer for the construction branch Ad-hoc studies in the field of distribution analyses, pricing, market entry strategies, customer satisfaction, image analyses etc.
- Our Consultant supports companies also when it comes to translating data into actions, i.e. the development of marketing strategies.



Our Market-Intelligence Tools

Market Analysis




- Market Volume
- Market Shares & Entry
- Competition Analysis

Distribution Analysis



- Channel Map
- Distribution Matrix
- Margins

Customer Insight




- Focus Groups
- Buying Motives
- Customer Benefits

Market Forecasts




- Indicator Models
- Life Cycle Models
- Econometric Analysis

Brand Analysis




- Brand Scorecards
- Brand - Triangle
- Brand Affinity

Customer Satisfaction




- Importance/Satisfaction Portfolios
- Customer Loyalty
- Customer Typology

Price Research



- Price-Sales-Function
- Price-Simulation-Tool
- Optimal Pricing

Webverstärker



- E Commerce Insights
- Search Engine Marketing
- Web Channel Analysis

"IC is a permanent partner of ours and provides helpful data for decisions."

Herr Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



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FACILITY SERVICES



Roland Berger
Strategy Consultants

**If there are any questions please
do not hesitate to contact us!**

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we show you the way

Included in the Report

- interactive PDF, Pivot Tables
- Pages (approx.) 100/ per Country
- Optional: Hard Cover: 150 €

Price

- Single Region 3.950 €
- All Regions: 18.960 €

Detailed Information about special offers, scale of discount as well as subscription prices are presented within the order form or the interactive price calculator.



Options of ordering – Fax:+43 1 5854623 30

- Click „Buy Now“ on the website and make your order with the interactive price calculator.
- Print out your order form (at the end of the “Full Details” document and fill in your data.

Content of the Market Report

Structure of the Study

Language of the report

English, German on Request

Introduction, Market structure and Executive Summary

Definition and demarcation of product groups, and as well an executive summary of the outcome.

Market drivers

Summary of the most important economic influence factors on the market.

Total Market Analysis

Total market development and forecasts for all market segments in quantity and value by regions, product groups, business segments, customer segments, distribution channels and opening types.

Competitive Analysis

Market development by value for each region and segment. Market shares of the top manufacturers for each region and for each application for the last two years

Market Structure

Countries

France, UK, Netherlands, Belgium, Italy, Spain, Others on Demand

Service Types & Sub-Service Types

Technical FM - Technical Maintenance, Control Engineering Services, Energy Management, Heating, Ventilation, & Air Conditioning, Others

Infrastructural (Soft) FM- Cleaning/Janitorial Services, Security Services, Catering Services, Reception / Porter Services, Landscape Services, Others

Entrepreneurial FM- Accounting & Controlling, Property Management, Space Planning, Purchasing, Others

Customer Segments

Energy and Resources, Food & Beverage, Industry & Manufacturing, Pharmaceuticals, Retail & Wholesale,

Transportation & Infrastructure, Hotels, Leisure & Entertainment, Business services & IT, Public administration, Health Care, Other

Methodology

Methodology and Data Sources

The market and competitive analysis is conducted through interviewing the most important manufacturers in the respective industry. All data are cross-checked for plausibility and evaluated by means of additional sources of information.

The market models and forecasts are based on economic indicator models, which are developed individually for each market. The influencing factors are analyzed by means of multivariate regression analysis and updated each year.

The economic indicators and environmental data are a result of secondary research of prestigious statistical institutes and are supplemented by internal market analyses.