



# Global Commercial Services & Supplies

Industry Profile

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## EXECUTIVE SUMMARY

### Market Value

The global commercial services and supplies industry grew by 4% in 2006 to reach a value of \$1,997.4 billion.

### Market Value Forecast

In 2011, the global commercial services and supplies industry is forecast to have a value of \$2,434.3 billion, an increase of 21.9% since 2006.

### Market Segmentation I

Diversified commercial and professional services account for 43.8% of the industry's value.

### Market Segmentation II

45.8% of the industry's value is generated in the United States.

### Market Share

Adecco is the global industry leader with a 1.2% share of the value.

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## CHAPTER 1 MARKET OVERVIEW

### 1.1 Market Definition

The commercial services and supplies industry is defined as the aggregate revenues generated within the commercial printing, diversified commercial and professional services, office services and supplies, human resources and employment services, and environmental and facilities services markets as follows.

The commercial printing market consists of revenues received by printing companies for services rendered to media and commercial end-users. The diversified commercial and professional services market is made up off the revenues of companies primarily providing commercial, industrial and professional services to businesses and governments not classified elsewhere. The value reflects the revenues accrued from warehousing, correction services, accountancy, management consulting, legal services, contract cleaning and security services.

The office services and supplies market consists of revenues generated from the manufacture and sale of paper, storage equipment, pens and pencils, business forms and stationery, and office services, such as photocopying, printing, binding etc. The market does not include the sale of office furniture or the sale of any of items to nonbusiness customers.

The human resources and employment services market consists of revenues received for provision of temporary staffing, search and placement (permanent staffing), and corporate training services. Other employment services, such as independent contracting and employee leasing are not included.

The environmental and facilities services market is made up from the revenues of companies providing environmental and facilities maintenance services. The market value includes waste management, facilities management and pollution control services but excludes large-scale water treatment systems classified in the water utilities industry.

All currency conversions have been calculated at constant 2006 annual average exchange rates.

## 1.2 Research Highlights

The global commercial services and supplies industry generated total revenues of \$1,997.4 billion in 2006, this representing a compound annual growth rate (CAGR) of 3.8% for the five-year period spanning 2002-2006.

The leading revenue source for the global commercial services and supplies market is the provision of diversified commercial professional services, which generated total revenues of \$875.82 billion in 2006.

Looking forward, the industry is forecast to accelerate its current performance, with an anticipated CAGR of 4% for the five-year period 2006-2011 expected to drive the industry to a value of \$2,434.3 billion by the end of 2011.

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### 1.3 Market Analysis

The commercial services and supplies industry is defined as the aggregate revenues generated within the following markets: commercial printing, office services and supplies, human resources and employment services, environmental and facilities services, and diversified commercial and professional services. The global industry has enjoyed healthy rates of year-on-year growth over the past five years, which is set to continue at a strong pace.

The global commercial services and supplies industry generated total revenues of \$1,997.4 billion in 2006, this representing a compound annual growth rate (CAGR) of 3.8% for the five-year period spanning 2002-2006. The leading segments in the industry are also the fastest growing, and thus the driving force behind industry's overall revenue growth.

The leading revenue source for the global commercial services and supplies market is the provision of diversified commercial professional services, which generated total revenues of \$875.82 billion in 2006, equivalent to 43.8% of the overall market value. The size of this segment is due to its inclusion of accounting and management consulting services, which are becoming more lucrative, due in part to stricter financial accounting regulations such as Sarbanes-Oxley coming into force. In comparison, the human resources and employment services segment was worth \$399.3 billion, which represented 20% of the industry's value. Liberalization of labor markets, and growth in many major economies which increases demand for labor, are reasons for this segment's importance.

The US is the most lucrative region for the commercial services and supplies industry, generating 45.8% of total revenues. This reflects the dominance of the US economy globally, and the consequent need for office-based administration of its many enterprises. As the Asia-Pacific economy grows, its share of the commercial services and supplies industry may be expected to rise from its current value of 16.7%.

Looking forward, the industry is forecast to accelerate its current performance, with an anticipated CAGR of 4% for the five-year period 2006-2011 expected to drive the industry to a value of \$2,434.3 billion by the end of 2011. The current drivers of growth should continue to operate, leading to sustained industry expansion.



**CHAPTER 2 MARKET VALUE**

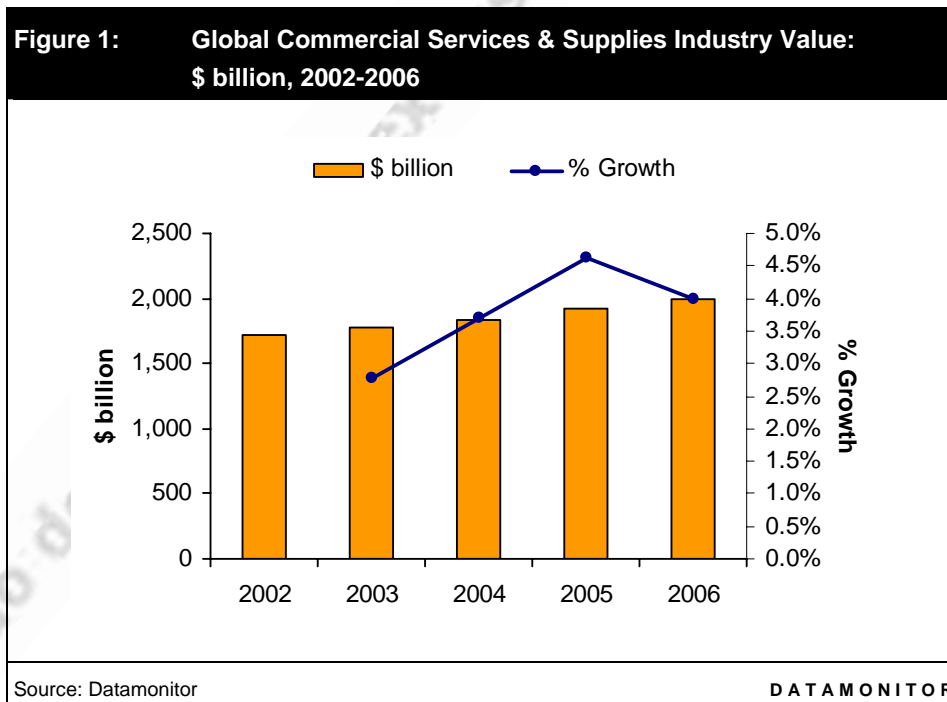
The global commercial services and supplies industry grew by 4% in 2006 to reach a value of \$1,997.4 billion.

The compound annual growth rate of the industry in the period 2002-2006 was 3.8%.

**Table 1: Global Commercial Services & Supplies Industry Value: \$ billion, 2002-2006**

Year	\$ billion	% Growth
2002	1,722.6	
2003	1,770.4	2.80%
2004	1,835.8	3.70%
2005	1,920.8	4.60%
2006	1,997.4	4.00%
<b>CAGR, 2002-2006:</b>		<b>3.8%</b>

Source: Datamonitor DATAMONITOR



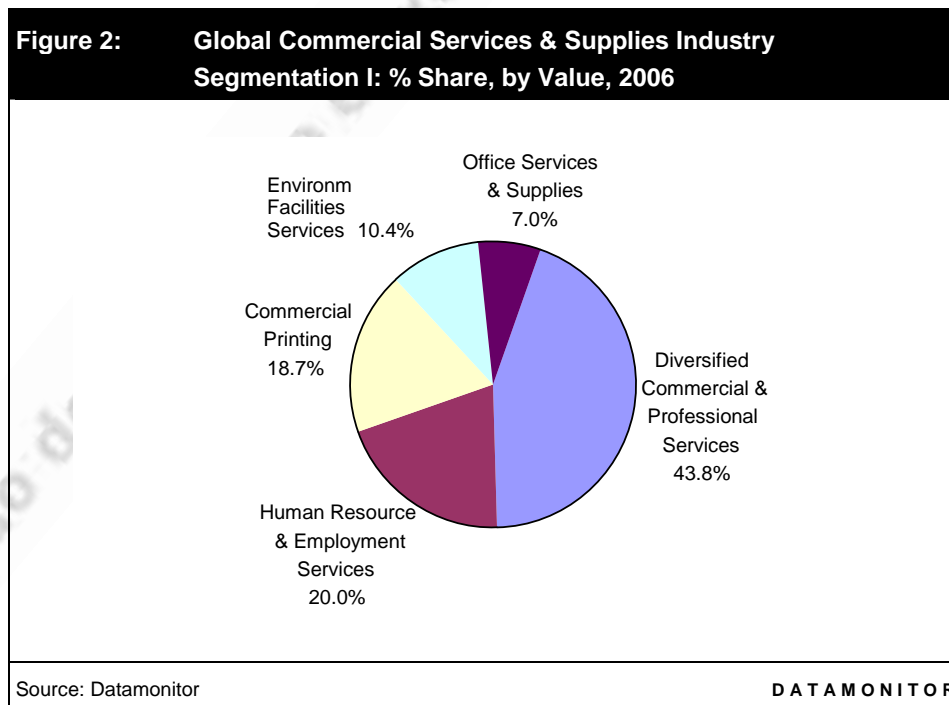
**CHAPTER 3 MARKET SEGMENTATION I**

Diversified commercial and professional services account for 43.8% of the industry's value.

In comparison, the human resource and employment services segment follows with 20%.

<b>Table 2: Global Commercial Services &amp; Supplies Industry Segmentation I: % Share, by Value, 2006</b>	
<b>Category</b>	<b>% Share</b>
Diversified Commercial & Professional Services	43.80%
Human Resource & Employment Services	20.00%
Commercial Printing	18.70%
Environmental & Facilities Services	10.40%
Office Services & Supplies	7.00%
<b>Total</b>	<b>100.0%</b>

Source: Datamonitor DATAMONITOR



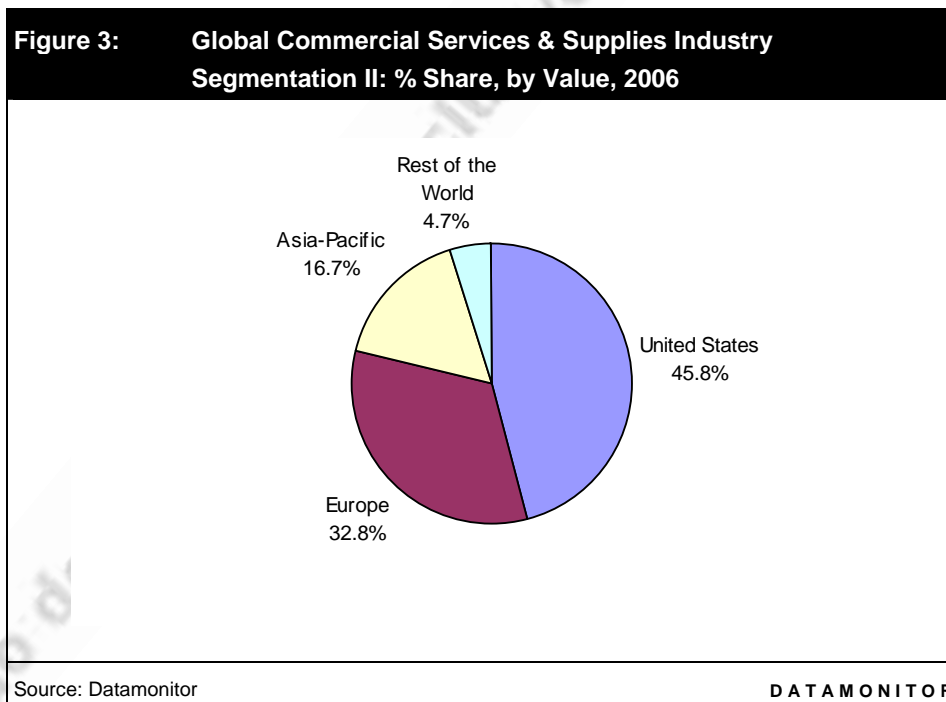
**CHAPTER 4 MARKET SEGMENTATION II**

45.8% of the industry's value is generated in the United States.

Europe follows with a 32.8% share.

<b>Table 3: Global Commercial Services &amp; Supplies Industry Segmentation II: % Share, by Value, 2006</b>	
<b>Geography</b>	<b>% Share</b>
United States	45.80%
Europe	32.80%
Asia-Pacific	16.70%
Rest of the World	4.70%
<b>Total</b>	<b>100.0%</b>

Source: Datamonitor DATAMONITOR



**CHAPTER 5 MARKET SHARE**

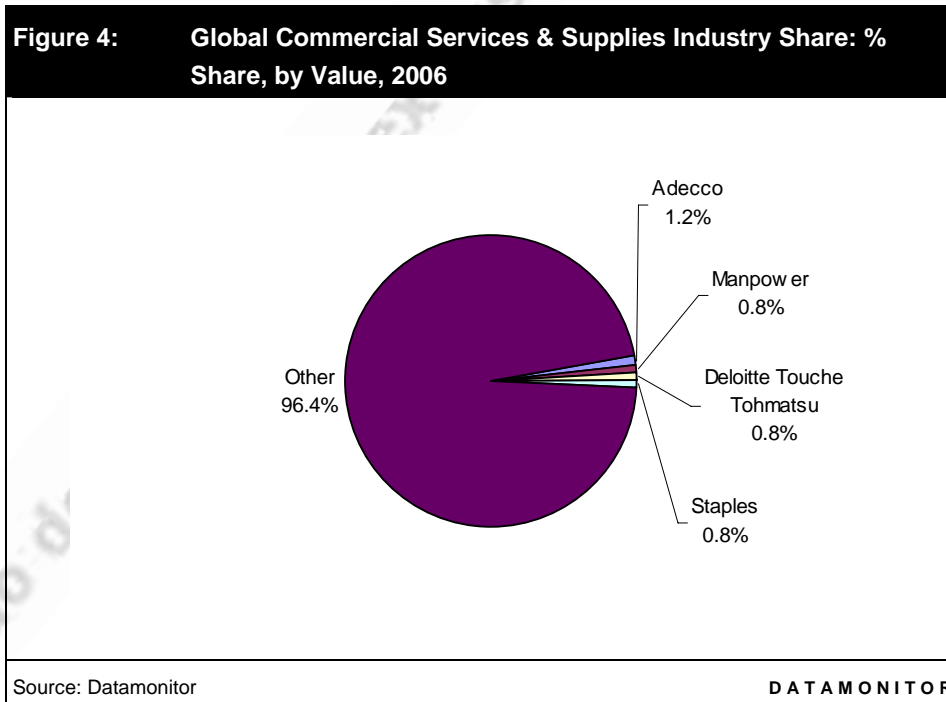
Adecco is the global industry leader with a 1.2% share of the value.

In comparison, Manpower, Deloitte and Staples all generate a further 0.8% of the value.

**Table 4: Global Commercial Services & Supplies Industry Share: % Share, by Value, 2006**

Company	% Share
Adecco	1.20%
Manpower	0.80%
Deloitte Touche Tohmatsu	0.80%
Staples	0.80%
Other	96.40%
<b>Total</b>	<b>100.0%</b>

Source: Datamonitor DATAMONITOR



## CHAPTER 6 COMPETITIVE LANDSCAPE

Having posted lethargic growth rates both during and immediately after the global economic slowdown of 2001, in 2004, the industry showed a marked recovery, with growth set to continue through to 2011. Each of the constituent sectors also showed distinct improvement. Indeed, even the commercial printing sector, which, whilst still posting a negative year-on-year growth at the early part of the decade, is inching back towards a positive growth position. This intensely competitive industry is vulnerable to economic fluctuations, and to innovative employment solutions: the introduction of sophisticated technological systems has invalidated the need for certain temporary staff positions, such as production supervisory roles. Wage pressures and a lack of suitably qualified staff further threaten revenues.

Like many of the other large companies, Adecco has many subsidiaries, targeting different areas of its sector. It is anticipated that with the growth of the global service sector, increasing numbers of employers will prioritize improving management and control of the personnel expenses that currently constitute their largest cost item. This bodes well for the leading players as employers turn to the recruitment industry when they experience difficulty in filling a vacancies. Demand for these services remains high: in January 2005, Accenture won a 10-year, \$575m renewal of its existing human resources outsourcing contract with BT. In July, the companies announced the signing of a five-year, \$127m learning services outsourcing contract that covers training in sales, management, safety and so on, renewing a previous deal between the two companies. Both the HR and learning services contracts take effect in August.

The global trend towards more flexible working arrangements is helping companies within this industry to increase their revenues. Germany, Italy, Spain and Japan are amongst those countries that are loosening-up their previously highly regulated labor markets, and as such, a presence within these markets is likely to pay dividends. The fact that many countries have sought to equate the pay and benefits of temporary workers with permanent members of staff has also assisted the industry.

As companies look to tighten the financial purse strings and outsource 'non-core' business, the competitors in the commercial services industry appear well placed to increase revenue. Many companies, including Accenture and PricewaterhouseCoopers, are finding themselves mired in controversy regarding accountancy inaccuracies and irregularities. Involvement in the fiasco that befell Italian dairy giant Parmalat, means that the threat of litigation hangs over Deloitte Touche Tohmatsu (DTT). The sector as a whole faces increased scrutiny following the collapse of Andersen and its implication in the Enron scandal, although widespread Sarbanes-Oxley compliance has boosted revenue through increased demand for provision of skilled accountancy services.

Driven by a need to assemble diverse product menus to obtain corporate business in an increasingly competitive marketplace, these leading players have embarked upon policies of acquisitions. Companies are expanding into and developing their operations in emerging economies, but some are in politically unstable regions – Ernst & Young, for example, is heavily involved with firms in Iraq. Such dependence leaves the company's revenues vulnerable if matters in the region deteriorate.

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## CHAPTER 7 LEADING COMPANIES

### 7.1 Adecco SA

Adecco is a diversified human resources solutions provider, offering both temporary and permanent placement services. It provides specialist and professional staffing, career services consulting and outplacement services. The company operates in Europe, North America and Asia Pacific. It is headquartered in Zurich, Switzerland and employs about 35,300 people.

The company recorded revenues of \$22,964 million during the fiscal year ended December 2005, an increase of 6.2% over 2004. The operating profit of the company was \$770.4 million during fiscal year 2005, an increase of 15.8% over 2004. The net profit was \$568.4 million in fiscal year 2005, an increase of 36.4% over 2004.

### 7.2 Manpower Inc.

Manpower is a US based recruitment company, which specializes in permanent, temporary and contract recruitment. The company also offers employee assessment, training, career transition and organizational consulting services. Manpower operates in 72 countries, including France, EMEA (Europe, Middle East and Africa), the UK, and the US. The company is headquartered in Milwaukee, Wisconsin and employs about 27,000 people.

The company recorded revenues of \$16,080.4 million during the fiscal year ended December 2005, an increase of 7.7% over 2004. The operating profit of the company was \$436.5 million during fiscal year 2005, an increase of 10.3% over 2004. The net profit was \$260.1 million in fiscal year 2005, an increase of 5.9% over 2004.

### 7.3 Deloitte Touche Tohmatsu

Deloitte Touch Tohmatsu (Deloitte) is a global accounting firm offering audit, tax, consulting and financial advisory services. The company operates in the Americas; Europe, Middle East and Africa (EMEA); and Asia-Pacific/Japan. It is headquartered in New York and employs about 121,300 people.

The company recorded revenues of \$20 billion during the fiscal year ended May 2006, an increase of 9% over 2005.

## CHAPTER 8 MARKET FORECASTS

### 8.1 Market Value Forecast

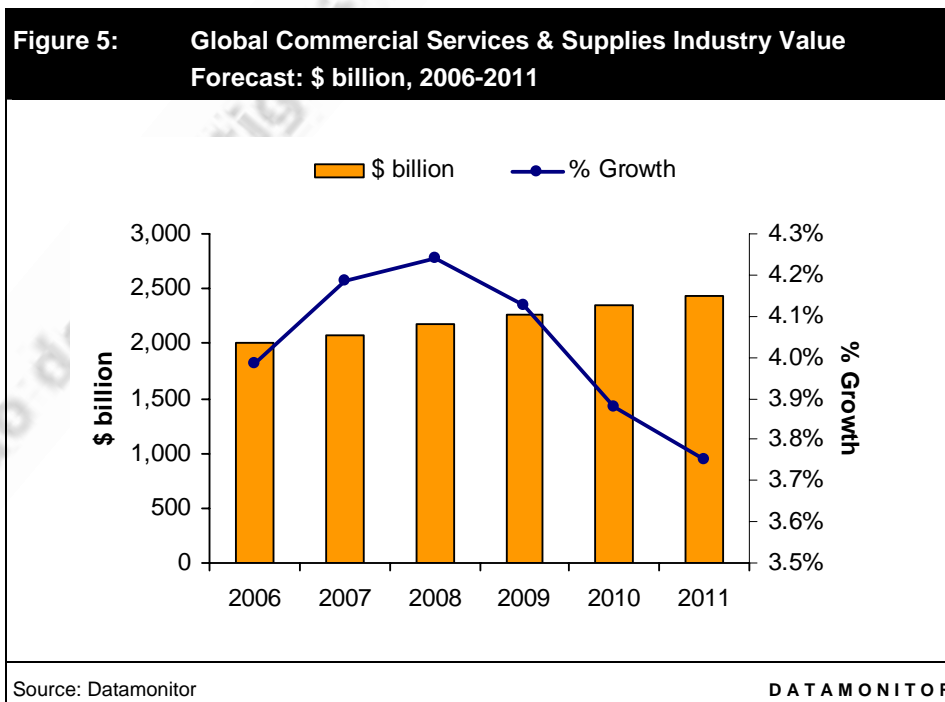
In 2011, the global commercial services and supplies industry is forecast to have a value of \$2,434.3 billion, an increase of 21.9% since 2006.

The compound annual growth rate of the industry in the period 2006-2011 is predicted to be 4%.

**Table 5: Global Commercial Services & Supplies Industry Value Forecast: \$ billion, 2006-2011**

Year	\$ billion	% Growth
2006	1,997.4	4.00%
2007	2,081.0	4.20%
2008	2,169.2	4.20%
2009	2,258.7	4.10%
2010	2,346.3	3.90%
2011	2,434.3	3.80%
<b>CAGR, 2006-2011:</b>		<b>4.0%</b>

Source: Datamonitor DATAMONITOR





## **CHAPTER 9 FURTHER READING**

### **9.1 Sources**

This report is based on a combination of primary Datamonitor research, including online, face-to-face and telephone interviews with consumer and industry players, and secondary research using various sources (including trade associations, news providers and others).

#### **Industry Associations**

##### **International Federation of Accountants**

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### **9.2 Related Datamonitor Research**

#### **Datamonitor Industry Profiles**

Global Commercial Printing (\$200)

Global Diversified Commercial & Professional Services (\$200)

Global Human Resource & Employment Services (\$200)

Global Environmental & Facilities Services (\$200)

Global Office Services & Supplies (\$200)

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