

United Kingdom Facility Management Market Assessment, By Type [Hard Service, Soft Service], By Mode [Single, Integrated], By Industry Type [Organized, Unorganized], By End-user [Commercial, Residential, Industrial, Public], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

United Kingdom facility management market is projected to witness a CAGR of 3.42% during the forecast period 2025-2032, growing from USD 70.37 billion in 2024 to USD 92.10 billion in 2032. The United Kingdom facility management market is growing very rapidly, driven by technological advancement and increased focus on sustainability. The hard services facility management segment is the dominating segment and generates higher sales in the market since critical services such as maintenance, HVAC, and plumbing are necessary and required to ensure that a facility is functional and safe. This will remain a core critical component of several industries where regulatory compliance is compulsory.

The soft facility management segment is gaining traction mainly because of the increased need for specialized cleaning and hygiene services across all sectors, especially in healthcare and corporate environments. England and Greater London remain a pivotal region for soft services, accounting for a substantial share of market activity, while other regions are adopting integrated facility management solutions to enhance operational efficiency and service delivery.

Improvements in health and safety standards have further fueled the need for better soft services. Also, advancements in technology on both sides are revolutionizing the service delivery model. Thus, with the changing work environment of organizations, the facility management industry is changing rapidly to suit diversified operational needs while keeping sustainability as well as innovations in their service portfolios highly visible.

For instance, in May 2024, Mitie Group PLC was awarded the USD 161.48 million contract, which provides maintenance work, repairs, servicing, and hard facilities management to the MOD's estate in Gibraltar, the first of a new suite of contracts to provide key services for the UK Armed Forces on overseas Ministry of Defence (MOD) bases had come into service by the Defence Infrastructure Organisation (DIO). It will cover every part of the MOD estate in Gibraltar, from the harbor and the runway to offices

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and accommodation and is expected to directly sustain around 200 jobs.

In December 2024, Mitie Group PLC secured a seven-year contract extension worth USD 17.5 million per year with Thales in the UK, part of the global technology group with markets in defense and security, aerospace and space, digital identity, and security. The contract will see Mitie deliver integrated facilities management services, including cleaning, energy management, landscaping, and security across 16 Thales sites across the UK, including its Reading headquarters.

Growing Hygiene Requirements in Healthcare Facilities Boosting Demand

The growing emphasis on hygiene in healthcare facilities fuels the demand for improved cleaning and sanitation services. As awareness of infection control increases, healthcare providers are focusing on the implementation of strict hygiene protocols to ensure patient safety and well-being, which eventually boosts the facility management market in the United Kingdom. Advanced hygiene solutions in the form of automated services and equipment for efficient cleaning are gradually becoming an essential requirement for maintaining a sterile environment. Investments in soft services are thus critical in elevating the quality of healthcare. Consequently, companies are manufacturing hygiene products and services due to which the market is booming, illustrating the need for prevention measures in healthcare facilities.

For instance, in March 2024, Sodexo Limited's Health & Care division extended established partnerships for catering, retail, and soft FM services at two hospitals in Stoke-on-Trent, Staffordshire. Under a new 10-year contract worth USD 39.9 million a year covering both hospitals as part of a Private Finance Initiative (PFI), Sodexo will continue to deliver catering, retail, and soft FM services throughout the PFI and the retained estate at both hospitals.

Cleaning Soft Services Fuels the Demand

The rising demand for cleaning soft services is significantly reshaping the facilities management landscape. As businesses increasingly recognize the importance of cleanliness and hygiene, they are turning to specialized cleaning services to maintain safe and welcoming environments. Companies are turning to holistic cleaning solutions that would not only cover routine maintenance but also integrate advanced technologies with eco-friendly applications. The inculcation of new cleaning trends improves operational efficiencies and supports environmental sustainability, making this service a significant necessity for businesses aspiring to create an effective environment. Consequently, the growth in demand for cleaning soft services reflects a broader commitment to employee well-being and customer satisfaction across various sectors.

For instance, in January 2025, following a competitive tender process, British Airways awarded ABM Group UK Limited a five-year contract to provide cabin and secure cleaning services across its fleet of aircraft at Terminal 3 at London Heathrow Airport. The contract marks a significant milestone for ABM. As well as expanding its aviation portfolio, the win sees ABM grow its presence at Heathrow Airport, Britain's busiest airport, with a team of over 600 team members. ABM's partnership with British Airways will include services on both short-haul and long-haul flights. Notably, it introduces over 10 extra night cleans-a brand new addition to ABM's service offerings at the airport.

Hard Services Lead the Market

Hard services are the leading segment in the facility management space in the United Kingdom. It comprises the essential maintenance and operational functions that are critical to building infrastructure. Some of the important services include mechanical and electrical system maintenance, HVAC, plumbing, and fire safety. The increased complexity of buildings and infrastructure and the incorporation of more advanced technologies have led to a higher demand for hard services requiring specialized expertise and innovative solutions. As institutions are increasingly focused on sustainability and energy efficiency, hard service companies are evolving by embracing smart technologies and predictive maintenance strategies. Companies are making significant developments in the integrated workplace services sector and receiving new contracts that encompass multiple sites across the western region of the United Kingdom. This strategic move aims to enhance operational efficiency and service delivery within critical government facilities and industries.

For instance, in November 2024, Sodexo Limited secured the integrated workplace services contract with HMRC for 24 sites across the western part of the UK. The new five-year contract includes an option to extend it for up to a further five years. The new contract will see Sodexo retain 19 sites, adding hard facility management services at these sites and will take on an additional five sites in Belfast, East Kilbride, and Glasgow. The sites include seven regional centers, valuation offices, and other workplaces.

Also, in January 2025, OCS Group International Limited announced the expansion of its long-standing partnership with GKN, a

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global leader in aerospace manufacturing, into a comprehensive TFM contract. OCS has expanded its service offerings to GKN throughout the years, introducing catering including the addition of three-year technical services. The company will also be delivering hard services across three of GKN's major sites - Filton, Western Approach, and GTC. OCS continues to provide soft services for GKN's smaller sites on the Isle of Wight and in Luton, relaunching soft services and mobilizing hard services.

England Dominates the Market Landscape

England dominates the facility management market landscape in the United Kingdom, which is characterized by a strong market presence and huge investment opportunities. The region's focus on operational efficiency, sustainability, and technological innovation positions England at the forefront of the sector, which drives demand for integrated services across industries. The UK remains at the top of the list in European commercial real estate investments owing to Brexit, which led to a steep decline in property prices fueling foreign investments in England. High investments have increased the opportunities for innovative facilities services, particularly within corporate real estate and integrated services. England had developed into a mature, sophisticated market that led the manufacturers into specialization toward the demand arising from shifting service needs and the acquisition of other similar companies providing services.

For instance, in September 2024, OCS Group International Limited acquired Exclusive Services Group, a provider of contract cleaning services operating across the United Kingdom and Ireland. The transaction represents OCS' fourth bolt-on acquisition in the last 12 months. Further, it enhances the integrated facility services provider's reach as a cleaning service provider to education, data centers, leisure, media, and retail sectors.

For instance, in January 2025, OCS Group International Limited, a global leader in facilities management, announced its acquisition of Maxim FM, one of the fastest-growing independent regional facilities management companies in the North-East of England.

Future Market Scenario (2025 - 2032F)

□ The United Kingdom facility management market is expected to experience robust growth driven by urbanization and the increasing need for effective management in expanding commercial and residential areas. As cities evolve, the demand for integrated facility management solutions will rise to support infrastructure and operational efficiency.

□ A significant trend in the facility management sector is adopting technology-enabled solutions, including AI, IoT, and data analytics. This technological shift will enhance operational efficiency and service delivery, allowing organizations to optimize resource management effectively.

□ Sustainability initiatives are becoming integral to facility management strategies, emphasizing energy efficiency and conservation measures. As environmental regulations tighten, facility managers will increasingly implement green practices to align with regulatory requirements and meet stakeholder expectations.

□ The future of the facility management market will also see a transformation in workforce dynamics, with a growing emphasis on skills development and training. As the industry adopts more advanced technologies, there will be a heightened need for skilled professionals who can navigate these innovations and drive operational success.

Key Players Landscape and Outlook

The United Kingdom facility management market is highly competitive, characterized by the presence of numerous established players and emerging companies. Key industry participants include major firms such as Mitie, ISS, Sodexo, and CBRE, which leverage their extensive resources and expertise to offer a wide range of services. The market is further intensified by the ongoing trend of mergers and acquisitions, allowing companies to expand their service offerings and geographical reach. Technological advancements play a crucial role in shaping the competitive landscape, with organizations increasingly adopting innovative solutions like artificial intelligence, IoT, and building information modeling to enhance operational efficiency. The emphasis on sustainability and energy management also drives competition, as firms strive to meet client demands for eco-friendly practices. Additionally, the growing focus on employee experience and workplace wellness is compelling facility management providers to deliver customized solutions that cater to diverse client needs. As the market continues to evolve, companies must remain agile and responsive to changing trends to maintain their competitive edge.

For instance, in September 2024, Amey Ltd was awarded the management of hard facility management services at HMP Lowdham Grange. The site, which is a Category B training prison in Nottinghamshire for adult male offenders aged 21 and over, has an operating capacity of 888. Earlier in the year Lowdham Grange was brought under public sector control.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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