

Facilities Management Outsourcing Market *Research & Analysis* UK 2025

Facilities Management Outsourcing Market Size & Trends 2019-2025; SWOT & PEST Analysis, Mix by Service Type 2019-2029; End User Mix 2019-2029; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Forecasts to 2029

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1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product/service mix, end user mix, SWOT, key trends and influences, supply and distribution channel trends. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Mailing details are also provided for each company to enable the reader to develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also be used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **FM Outsourcing Market Size – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **FM Outsourcing Service Mix – Current & Future**

This report identifies the key product or service sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **End User / Channel Mix – Current & Future**

The report identifies the key end use sectors or channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key end use sectors also provided, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles**

This report includes a 1 page profile for each company including profile overview, address details and 4-5 years of the most recent key financial indicators enabling the reader to quickly gauge the current financial health of a company.

- **Relevant Companies, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

1.2 Introduction to Research & Analysis Reports

In order to provide a comprehensive review of the market, this report includes:-

THE MARKET, SERVICES & END USE SECTORS

Market Size & Key Market Trends 2019-2029 – Value of the market since 2019 is provided with current market size estimates provided based on quantitative sales figures from the industry. Profitability, assets, liabilities and net worth are also illustrated in easy to read & disseminate charts. In addition, yearly forecasts of market size and other key financial indicators are also provided to 2029. Key market trends are also identified and discussed providing the report with both 'quantitative' and 'qualitative' characteristics.

PEST Review & Key Market Influences – A review of the key issues and influences which are impacting market demand at present & in the future are also provided. These issues range from economic, political, environmental, social and technological and are identified and discussed where appropriate, providing the reader with a greater depth of market intelligence. A strategic PEST review for this market is also illustrated in chart format for faster reference.

Service Mix & Trends – This report identifies the key sectors which comprise the overall market and provide a current & historical share by value. This data is supported by qualitative comment where appropriate in order to offer more substantive market knowledge. Forecasts to 2029 are also provided to offer more insightful market intelligence.

SWOT Analysis – A strategic SWOT analysis for the market is also provided based on input from primary and secondary sources in the industry. By identifying key strengths, weaknesses, opportunities and threats, this report provides a more solid foundation for basing strategic and operational marketing decisions.

End Use / Channel Mix & Trends – By providing historical, current and forecast shares by end user or channel for this market, the report provides an invaluable illustration of the key sectors that are currently driving demand and likely future prospects. Qualitative comment on key trends within these sectors based on input from the industry provides a more in-depth review of the market as well as illustrating the most likely future scenarios.

THE SUPPLIERS & INDUSTRY STRUCTURE

Industry Structure – The report includes a detailed and quantitative review of the industry in terms of number of companies, share by turnover, mix by employees, geographical mix, share by age of companies, mix by recent sales performance, sales per employee, share by credit rating & mix by location type (e.g head office/branch etc).

Industry Trends 2019–2029 – Industry totals and averages since 2019 are also provided for turnover, profitability, assets, net worth and liabilities. These indicators provide vital insight into the current health of the industry and are forecasted to 2029.

Supplier Review – This report provides vital intelligence of relevant and leading players in this market with a combined estimated turnover of more than **£100 billion in 2025**. Each company is ranked by turnover, profitability and other key financial indicators. Each company also has a 1 page profile identifying address details, overview of activities and key financials for the last 5 years. The report also provides turnover estimates for every company, regardless of size, enabling the reader to identify individual market shares.

2. UK FACILITIES MANAGEMENT MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Facilities Management market comprises of a wide range of activities within myriad public and private end use sectors. Valued at over £xxx billion nominally in 2025 or c.£xxx billion in real terms, this 13th edition report reviews the size, market trends and influences for facilities management contractors and the implications of these trends for suppliers of equipment, products and materials to the UK FM industry.

The Facilities Management market comprises of the following key market sectors, with this report reviewing trends and market size & share for each of the key market sectors since 2019 with forecasts to 2029 for:-

- **Bundled / TFM / IFM Facilities Management**
- **Property & Operations & Maintenance**
- **Office Support Services**
- **Security**
- **PFI / PPP FM**
- **Contract Catering**
- **Contract Cleaning**

The report also reviews market trends and shares accounted for by the key end use sectors since 2019, with forecasts to 2029. More specifically, end use markets quantified and analysed include:-

- **Education (private & public)**
- **Health (private & public)**
- **Central & Local Government**
- **Social Housing**
- **Financial / Professional**
- **Transport / Logistics**
- **Utilities**
- **Technological / Communications**
- **Manufacturing**
- **Retail**
- **Property Management**
- **Leisure**

The research methodology for this report included quantitative analysis of financial data from more than 80 FM contractors with a combined revenue of more than £100 billion in 2025, coupled with primary research information through trade interviews, credit reference agencies, Companies House, FM contractor reports & websites and discussions with key end use clients.

This data is then supported by secondary research from industry magazines, trade commentators, HM Government, HM Customs and other sources including our own experience of researching this market for over 2 decades.

Market Summary

The FM market in its broadest sense is currently worth some £xxx billion at current prices, with market performance in 2025 estimated to xxxxxx by around xxx% CAGR (compound annual growth rate) preceded by xxxxxx in 2024.

Between 2019 and 2025, the total outsourcing market xxxxxx by around xx% in nominal terms, underpinned by xxxxxx following the xxxxxx xxxxxx, xxxxxx demand in key end use sectors and the shift toward xxxxxx xxxxxx implementation. However, a lack xxxxxx xxxxxx over the same period (xx%), reflects recent xxxxxx xxxxxx xxxxxx industry underpinned by xxxxxx xxxxxx and a sector which has been xxxxxx xxxxxx xxxxxx and xxxxxx xxxxxx xxxxxx confidence.

Market forecasts are xxxxxx, with annual xxxxxx rates of x% as the market continues to xxxxxx; xxxxxx gear in terms of xxxxxx xxxxxx provision and usage; and xxxxxx from xxxxxx IFM demand alongside xxxxxx xxxxxx. A focus on xxxxxx and xxxxxx xxxxxx xxxxxx xxxxxx xxxxxx to xxxxxx growth opportunities with xxxxxx xxxxxx challenges further xxxxxx market demand.

The UK facilities management market is comprised of a wide range of 'hard' and 'soft' FM services. In 2025 the property maintenance and O&M sector is estimated to account for the xxxxxx xxxxxx xxxxxx market, with a share of xv% by value, with revenues xxxxxx by an estimated x% in 2025.

The xxxxxx xxxxxx sector in the UK facilities management market is accounted for by the xxxxxx xxxxxx 'bundled' or IFM services sector, with sales in this sector accounting for around x% (2019:x%) of the UK FM outsourcing industry in 2025.

In terms of end user mix, xxxxxx and xxxxxx represent the largest key client groups for FM companies in 2025, with 13.3% and 16.9% share respectively reflecting sales of around £x billion combined in 2025.

This is closely followed by the xxxxxx, xxxxxx and xxxxxx sectors accounting for x% each in 2025.

Future prospects centre on xxxxxx xxxxxx xxxxxx FM market pivoting xxxxxx xxxxxx -driven 'xxxxxx xxxxxx', underpinning xxxxxx xxxxxx xxxxxx in the near-medium term. Full year forecasts to December 2025 are for x% xxxxxx, with a further x% growth for 2026. As xxxxxx eases, overall nominal xxxxxx is likely to xxxxxx xxxxxx market performance is xxxxxx xxxxxx x% annually in real terms in the near term. Total revenue is expected to reach £x billion by 2029 reflecting x% xxxxxx in nominal terms in the next 4 years, or just under x% xxxxxx to 2029 in real terms.

2.2 FACILITIES MANAGEMENT MARKET SIZE & TRENDS 2019-2029

2.2.1 Facilities Management Market Size 2019-2029 – Current Prices

The UK Facilities Management market encompasses a wide range of services and in 2025 is estimated to be worth just under £128 billion, as illustrated below:-

Figure 1: Facilities Management Market – UK 2019 – 2029 By Value £m

Chart Removed from Sample

Sales of FM outsourcing contracts in 2025 are valued at £x billion in 2025, reflecting an estimated x% xxxxxx in 2025 compared to x% xxxxxx in 2024 as xxxxxx xxxxxx eases.

Since the xxxxxx xxxxxx, the market has experienced xxxxxx of performance as demand xxxxxx sectors xxxxxx, xxxxxx xxxxxx in xxxx at over x% per annum. In addition to macro-economic influences, the industry has also xxxxxx from a raft of key demand drivers boosting value growth opportunities, these are explored later in the report but briefly include:-

- **Adoption of xxxxxx and xxxxxx** - xxxxxx tools xxxxxx maintenance, optimise xxxxxx and xxxxxx service delivery, increasing xxxxxx and reducing costs for client and FM contractor. The “xxxxxx -in-the- xxxxxx” approach ensures xxxxxx, boosting xxxxxx xxxxxx. xxxxxx xxxxxx are increasingly integrated into FM operations, particularly for xxxxxx and work order xxxxxx. This trend is driven by the need for xxxxxx solutions and improved xxxxxx making through xxxxxx and represents a key future growth driver.
- **Emphasis on xxxxxx xxxxxx Targets** - Demand for xxxxxx products and xxxxxx systems continues to xxxxxx, xxxxxx by regulatory mandates like the xxxxxx xxxxxx as well as xxxxxx corporate xxxxxx xxxxxx. Providers offering xxxxxx gain a competitive edge, particularly in xxxxxx contracts. xxxxxx represents a key market driver in 2025, with FM providers enhancing solutions to meet xxxxxx xxxxxx and xxxxxx xxxxxx. The xxxxxx sector in particular prioritises xxxxxx practices with this trend expected to grow in significance as xxxxxx xxxxxx approach.
- **xxxxxx in Integrated Facilities Management (IFM)** - IFM, combining hard and soft FM services xxxxxx xxxxxx xxxxxx whilst xxxxxx xxxxxx and xxxxxx burdens. The xxxxxx xxxxxx xxxxxx IFM reflects xxxxxx xxxxxx preferences for xxxxxx xxxxxx contracts that xxxxxx supply chains. This trend has been driven by the need for xxxxxx xxxxxx and xxxxxx xxxxxx within a lower xxxxxx xxxxxx environment in both commercial and public sectors.