



Facilities Management Outsourcing Market *Research & Analysis* UK 2020

Report Sample

Text, Figures & Charts Have Been Changed for Sample Purposes

Facilities Management Outsourcing Market Size & Trends 2014-2020; SWOT & PEST Analysis, Mix by Service Type 2014-2024; End User Mix 2014-2024; Market Leaders' Ranking, Profiles & Key Financials; Industry Averages; Market Forecasts to 2024

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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. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly 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 & Sales Leads**

This report includes a 1 page profile for each company including full contact details for developing fast sales leads; 3 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, 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 2014-2024 – Value of the market since 2014 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 2024. 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 2024 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 2014–2024 – Industry totals and averages since 2014 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 2024.

Supplier Review – This report provides vital intelligence of relevant and leading players in this market with a combined estimated turnover of more than **£95 billion in 2020**. Each company is ranked by turnover, profitability, number of employees and other key financial indicators. Each company also has a 1 page profile identifying contact details, overview of activities, key financials for the last 3 years and an '*at a glance*' financial health chart. The report also provides turnover estimates for every company, regardless of size, enabling the reader to easily 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 just over £xx billion in 2020, this 11th 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 2014 with forecasts to 2024 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 2014, with forecasts to 2024. 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 100 FM contractors with a combined revenue of more than £95 billion in 2020, 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 2 decades.

Market Summary

The FM market in its broadest sense is currently worth some £x billion at current prices, with market performance in 2020 estimated to xxxxx by around x% CAGR (compound annual growth rate) preceded by xxx% xxxx in 2019.

Between 2014 and 2020, the total outsourcing market has xxxx by an estimated xxxx %, xxxx by just under £ xxxx billion. Growth rates xxxx in xxxx at just under xxxx %, before xxxx through to 2019 in response to xxxx xxxx xxxx xxxx conditions, before xxxx xxxx xxxx xxxx in 2020.

The market xxx by some xxxx % between 2014 and 2019, xxxx xxxx sales of £ xxxx billion before the xxxx xxxx "COVID-19" resulted in an xxxx xxxx in sales of £ xxxx xxxx billion in 2020. Whilst this represents a substantial xxxx xxxx of sales for the industry, our analysis indicates that the xxxx may not be as xxxx as xxxx xxxx and xxxx xxxx xxxx in nature.

Certain FM companies and segments of the outsourcing market appear to be xxxx xxxx xxxx xxxx xxxx xxxx in 2020, with our forecasts suggesting that the market is xxxx xxxx xxxx xxxx overall UK economy. Trade sources indicate that xxxx xxxx xxxx faster than other sectors of the UK xxxxx in 2021, with sales xxxx xxxx xxxx to xxxx COVID xxxx by xxxx xxxx xxxx.

xxxxxxx, in 2020 xxxxxxxx fundamental changes evident in outsourcing demand likely to reverberate across the industry for many years, with suppliers rapidly seeking to xxxx xxxx xxxx xxxx profitable. Recognising and adapting rapidly to key changing workplace and leisure trends represents a fundamental pre-requisite for FM providers in 2020 and beyond.

xxxx, xxxx uncertainties, discretionary xxxx xxxx decisions being xxxx and sustained xxxx on xxxx xxxx budgets continue to reverberate throughout the industry in 2020. Certain sectors focused on xxxx investment in the xxxx, xxxx and xxxx end use segments are experiencing particularly xxxx xxxx trading conditions in 2020, with this set to continue in the near to medium term.

xxxx xxxx performing FM companies, or those expressing greater optimism are generally more active in the xxxx xxxx xxxx xxxx xxxx xxxx xxxx spending end use sectors. The UK xxxx xxxx response to 'xxxx xxxx the xxxx through a sustained and accelerated programme of xxxx xxxx xxxx xxxx sectors should offer good growth opportunities in the near to medium term.

Between 2017 - 2020 margins have xxxx xxxx xxxx xxxx as rising xxxx & xxxx, xxxx and xxxx costs have contributed to xxxx profitability in conjunction with xxxx xxxx coming under xxxx xxxx xxxx. xxxx xxxx xxxx shareholder demands are xxxx xxxx xxxx as a key reason why xxxx xxxx xxxx xxxx have sought to focus on xxxx xxxx xxxx, resulting in an xxxx xxxx xxxx xxxx marketplace in 2020.

Differentiation through xxxx xxxx xxxx xxxx xxxx xxxx xxxx remain critical for FM suppliers in 2020 in order to boost differentiation in a xxxx xxxx xxxx xxxx marketplace. One key impact of COVID-19 was a xxxx xxxx xxxx of profitability in the industry, with xxxx xxxx xxxx demand stimulating increasing levels of

xxxx xxxx xxxx xxxx – particularly amongst xxxx xxxx xxxx xxxx xxxx FM providers. Whilst this is likely to be a relatively short-term phenomenon, the industry's current assets have xxxx xxxx xxxx significant xxxx xxxx in 2020 as overall profitability xxxx by an estimated xx%.

The UK facilities management market is comprised of a wide range of 'hard' and 'soft' FM services. In 2020 the xxxx xxxx xxxx xxxx xxxx is estimated to account for the largest proportion of the market, with a share of around x% by value, xxxx by an estimated xx% in 2020.

The second largest sector in the UK facilities management market is accounted for by the highly xxxx 'xxxx' FM services sector, with sales in this sector accounting for around xx% (2019:x.5%) of the UK FM outsourcing industry in 2020.

Sources suggest that there has been somewhat of a resurgence in the xxxx xxxx sector in recent months, as a direct result of COVID-19 and rapid acceleration xxxx xxxx xxxx xxxx xxxx xxxx spending through this sector such as 'xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx etc. As a result, one of the largest integrated FM service providers recently reported xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx due to Covid-19.

Our analysis suggests that whilst xxxx xxxx xxxx xxxx xxxx companies have xxxx xxxx xxxx been xxxx xxxx xxxx xxxx xxxx to the 'COVID-19 xxxx xxxx, xxxx and xxxx xxxx companies have experienced a xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx.

The effects of this xxxx xxxx FM outsourcing market are likely to become more evident in the coming months in the form of xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx whilst the xxxx xxxx xxxx sector continues to maximise the opportunities available in 2020/21.

In terms of end user mix, xxxx and xxxx represent the largest key client groups for FM companies in 2020, with 12.5% and 16% share respectively reflecting sales of around £xxx billion combined.

This is closely followed by the xxxx and xxxx sector accounting for xx% each and a value of £x billion and £x billion respectively in 2020.

xxxx expenditure accelerated at unprecedented levels xxxx xxxx xxxx xxxx, with xxxx xxxx xxxx borrowing in April-June 2020 double that of the whole of 2019. A record £ xxxx billion of xxxx xxxx spending for 2020/21 was xxxx xxxx, set to offer an immediate and rapid boost for FM providers active in this market. These sectors are likely to exhibit further underpinning later this year following a sustained upturn in xxxx xxxx xxxx investment following the xxxx xxxx xxxx xxxx planned for Q4 2020 (xxxx accepted by xxxx xxxx until September 24th 2020).

In terms of future prospects, the general consensus is for a xxxx xxxx xxxx xxxx overall for the outsourcing market, with xxxx xxxx xxxx companies significantly xxxx xxxx than xxxx xxxx xxxx.

Near term, the FM market is likely to be characterised by increasing evidence of a xxxx xxxx xxxx nature, with xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx outperforming the market.

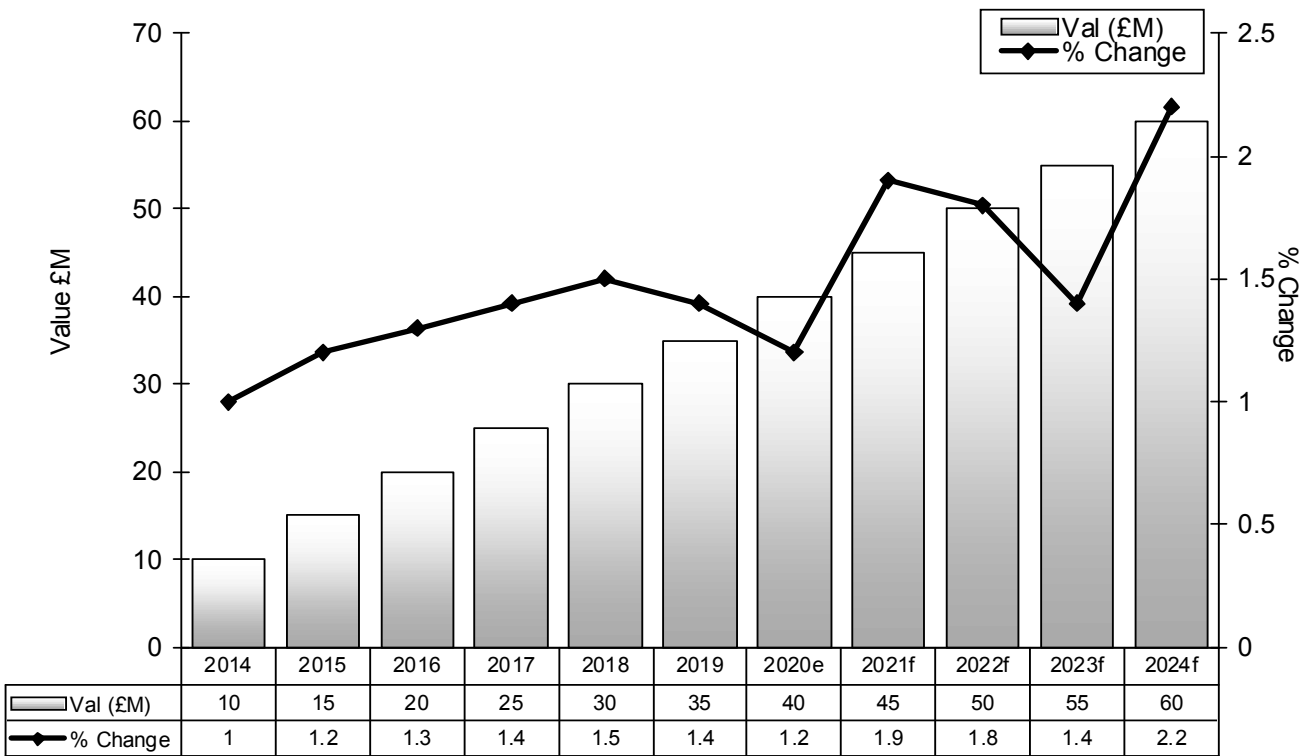
Full year forecasts to December 2021 are for xx% xxxx, with a further xxxx xx% upturn in 2022. xxxx xxxx xxxx is then expected to xxxx in the medium term as the impact of COVID-19 and Brexit cycles through, with total sales reaching £xxxx billion by 2024 reflecting xxx% xxxxxx in the next 4 years.

2.2 FACILITIES MANAGEMENT MARKET SIZE & TRENDS 2014-2024

2.2.1 Facilities Management Market Size 2014-2024 – Current Prices

The UK Facilities Management market encompasses a wide range of services and in 2020 is estimated to be worth just over £xx billion, as illustrated below: (figures changed in chart for sample purposes) -

Figure 1: Facilities Management Market – UK 2014 – 2024 By Value £m



NB: Figures changed in above sample

Source: MTW Research / Trade Estimates

Sales of FM outsourcing contracts in 2020 are valued at £xx billion in 2020, reflecting an estimated xx% xxxx, compared to xxxx % xxxx in 2019.

Analysis of the market can largely be segmented into 2 distinct timeframes – 'xxxx and 'xxxx xxxx xxxx & xxxx 'xxxx of March 2020. Market trends evident for xxxx were xxxx xxxx in our previous report, though our most recent analysis indicates xxxx xxxx xxxx xxxx growth for full year 2019, with xxxx uncertainties xxxx xxxx xxxx attributed to a xxxx xxxx in discretionary contracts and xxxx xxxx investment.

Despite a xxxx xxxx xxxx for 2019 performance, sources indicate that the market xxxx xxxx xxxx xxxx sales growth in 2019 due to a shifting focus toward xxxx xxxx models and enhanced xxxx xxxx. However, margin xxxx xxxx xxxx xxxx remained xxxx xxxx xxxx.

The impact of the xxxx xxxx xxxx on the market is clear in the above chart, though our analysis suggests there are significant xxxx in xxxx xxxx of individual FM companies' performance in Q2 and Q3 2020, xxxx xxxx on xxxx xxxx xxxx specialism, xxxx xxxx, end use markets and intrinsic xxxx xxxx such as those identified in our 2019 report.

Between 2014 and 2019, the market xxxx by x%, with performance xxxx xxxx in 2019 in response to a xxxx xxxx xxxx in the market of xxxx xxxx contracts as an increasing number of xxxx xxxx xxxx xxxx approach to xxxx xxxx.

With xxxx a xxxx framework xxxx agreement likely to be in place by December 2020 xxxx the xxxx xxxx xxxx, this issue continues to xxxx xxxx xxxx growth in 2020. However, sources indicate that xxxx xxxx xxxx xxxx ends, there may be an element of xxxx xxxx xxxx xxxx xxxx in H2 2021 and 2022 as the impact of xxxx xxxx xxxx xxxx through and xxxx xxxx and xxxx xxxx activity xxxx xxxx strengthens.

However, the over-arching xxxx xxxx xxxx xxxx growth on the UK outsourcing market in 2020 is the xxxx xxxx xxxx xxxx; 'xxxx xxxx xxxx March and June; and xxxx xxxx xxxx xxxx in H2 2020 resulting in up to 1 million xxxx xxxx xxxx xxxx temporarily. With the xxxx xxxx xxxx scheme ending in October 2020, many businesses in the xxxx xxxx xxxx xxxx sectors xxxx xxxx xxxx xxxx in Q3/4 2020 with more than xxxx xxxx xxxx xxxx in July 2020.

Much of the bundled/IFM outsourcing market is based on xxxx xxxx but xxxx xxxx xxxx term contracts and is therefore xxxx xxxx xxxx xxxx such as that prompted by the COVID pandemic. In addition, the significant xxxx xxxx xxxx response in Q2 2020 was such that demand for certain areas of outsourcing xxxx xxxx xxxx xxxx xxxx xxxx in order to:-

- 'xxxx xxxx xxxx xxxx xxxx sector assistance;
- Increase xxxx xxxx xxxx xxxx,
- Repurpose xxxx xxxx xxxx xxxx xxxx xxxx);
- Develop xxxx xxxx xxxx systems
- Recruit xxxx xxxx xxxx xxxx xxxx;
- Increase xxxx xxxx xxxx xxxx;
- Develop xxxx xxxx xxxx xxxx xxxx etc);
- Reinforce xxxx xxxx xxxx xxxx xxxx;
- Increase xxxx xxxx xxxx xxxx xxxx xxxx;
- Increase xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx etc.

Such activities xxxx xxxx xxxx to report in April that the overall impact on its business was xxxx xxxx xxxx xxxx financial terms, though xxxx xxxx significantly xxxx xxxx xxxx xxxx xxxx xxxx.

In terms of xxxx xxxx xxxx market trends, trade sources report that demand from xxxx xxxx xxxx xxxx xxxx remained relatively stable whilst xxxx xxxx xxxx, xxxx xxxx, xxxx, xxxx xxxx xxxx xxxx and xxxx xxxx xxxx services increased in H1 2020.

xxxx xxxx xxxx xxxx xxxx xxxx xxxx xxxx sectors also remained reasonably xxxx xxxx xxxx, though may experience some xxxx xxxx in H2 2020 from a xxxx xxxx xxxx xxxx xxxx contracts and wider xxxx xxxx xxxx xxxx xxxx.

In 2020, more tangible xxxx xxxx xxxx on current market conditions is emanating from sectors such as xxxx.

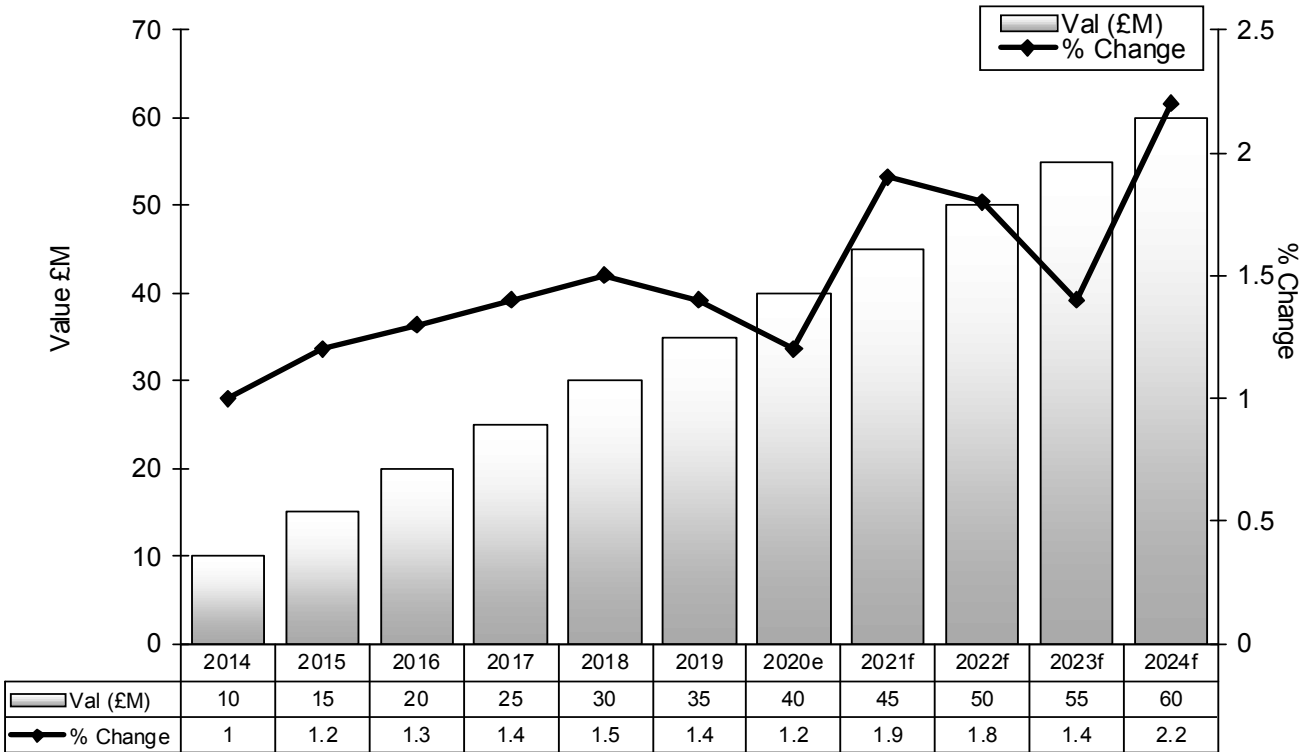
Whilst the xxxx xxxx xxxx xxxx xxxx xxxx services may take a xxxx xxxx xxxx xxxx xxxx xxxx return to strength, sources indicate that the market should xxxx xxxx xxxx 45% of the sales xxxx xxxx xxxx xxxx by December 2021, reflecting a market with xxxx xxxx xxxx xxxx xxxx market fundamentals.

Growth in 2021 xxxx xxxx xxxx xxxx xxxx xxxx xxxx in H1 due to xxxx xxxx and xxxx xxxx, our forecasts are for market performance to xxxx in the second half of the year and into 2022, with xxxx xxxx xxxx xxxx xxxx more xxxx. By December 2022, the market is forecast to xxxx xxxx xxxx xxxx xxxx xxxx xxxx levels exceeding a total market size in current price terms of £xx billion by 2024.

2.2.2 Facilities Management Market Size 2014-2024 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2014, with forecasts to 2024 (Figures Changed for Sample Purposes):-

Figure 2: Facilities Management Market – UK 2014 – 2024 Constant Prices £M



Source: MTW Research / Trade Estimates

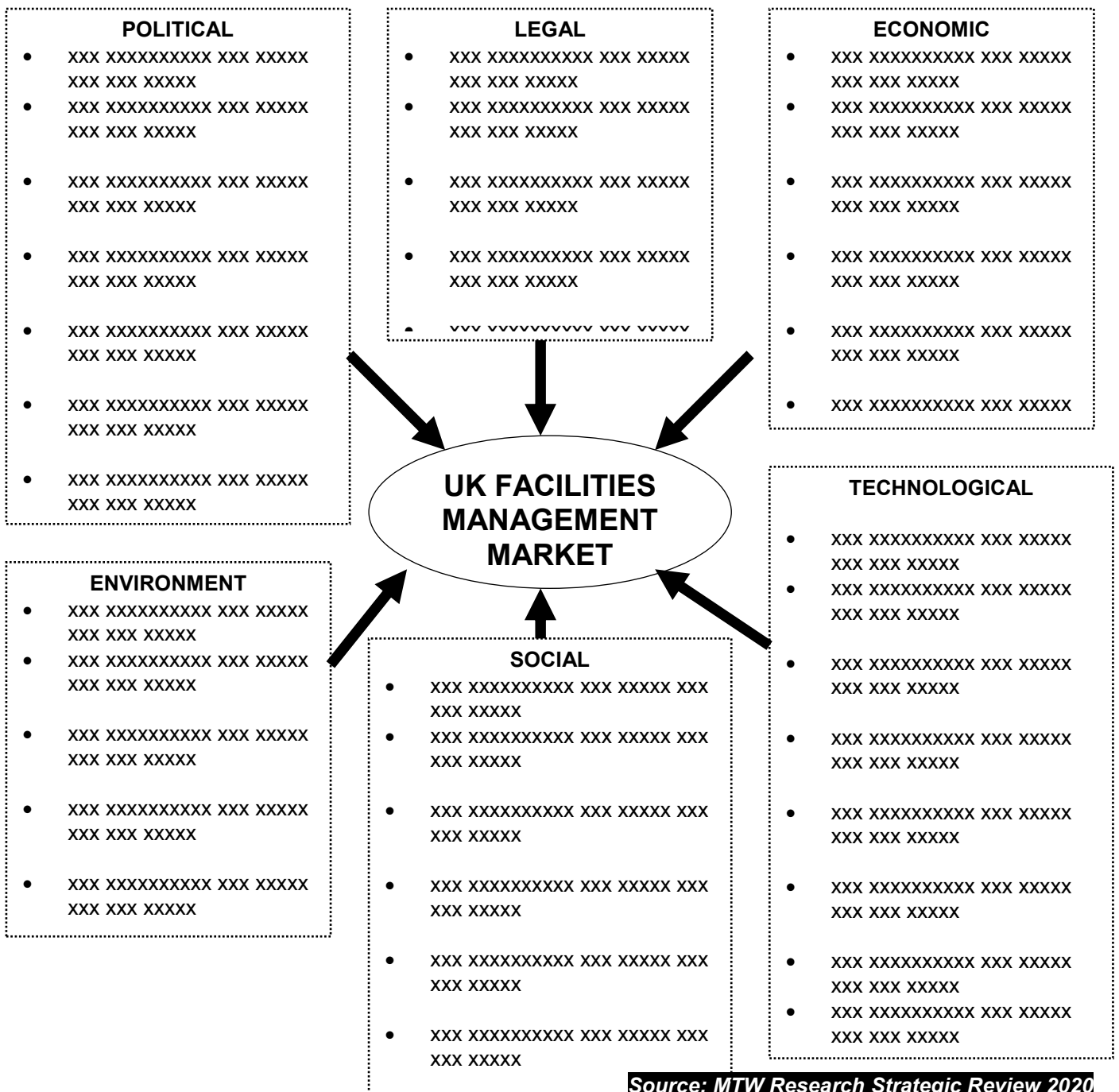
The above chart illustrates the impact of CPI inflation on the FM market, with inflation currently running at

2.4 KEY MARKET INFLUENCES, PEST & SWOT ANALYSIS

2.4.1 PEST ANALYSIS – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK Facilities Management market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 12: PEST Analysis for UK Facilities Management Market in 2020



Source: MTW Research Strategic Review 2020

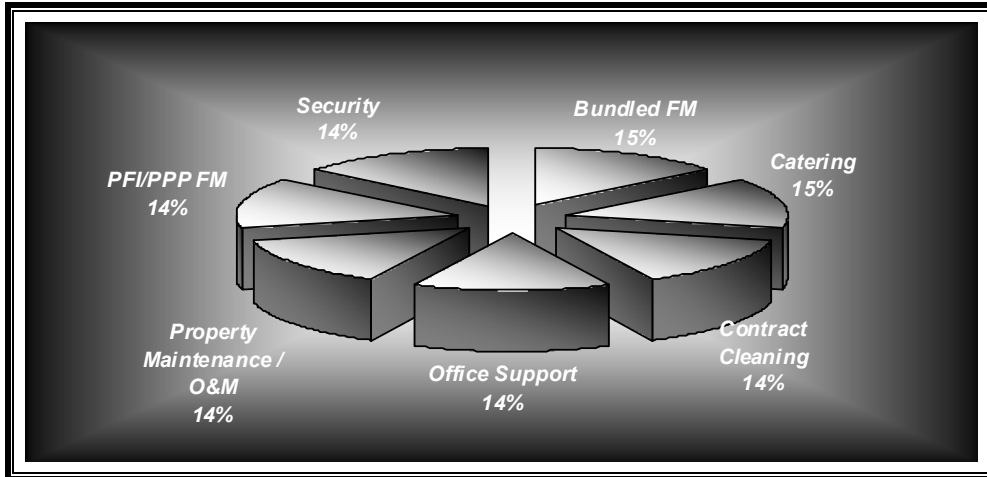
Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.5 FACILITIES MANAGEMENT PRODUCT / SERVICE MIX

2.5.1 Share by Facilities Management Sector 2014, 2020 & 2024

The share accounted for by each of the key sectors within the UK Facilities Management market in 2020 is illustrated in the following chart (Figures Changed in Sample):-

Figure 19: Share by Key Product Sector in Facilities Management Market 2020



Source: MTW Research / Trade Sources

As illustrated above, the UK facilities management market is comprised of a wide range of 'hard' and 'soft' FM services. In 2020 the xxx xxxxx sector is estimated to account for the largest proportion of the market, with a share of just over x%. Sales in this sector are currently estimated at just over £x billion in 2020.

The 'xxx xxxxx services sector is the second largest, with sales in this sector accounting for just under x% of the UK FM industry in 2020. Sales in this sector are estimated at just under £x billion at current prices.

The 'xxx xxxxx xxx xxxxx sector has become an increasingly important aspect of the UK facilities management industry in recent years, xxx xxxxx in 2020 the impact of COVID-19 is indicated to have had a xxx xxxxx xxx xxxxx demand. In 2020 sales attributed to this sector are estimated to be worth some £x billion.

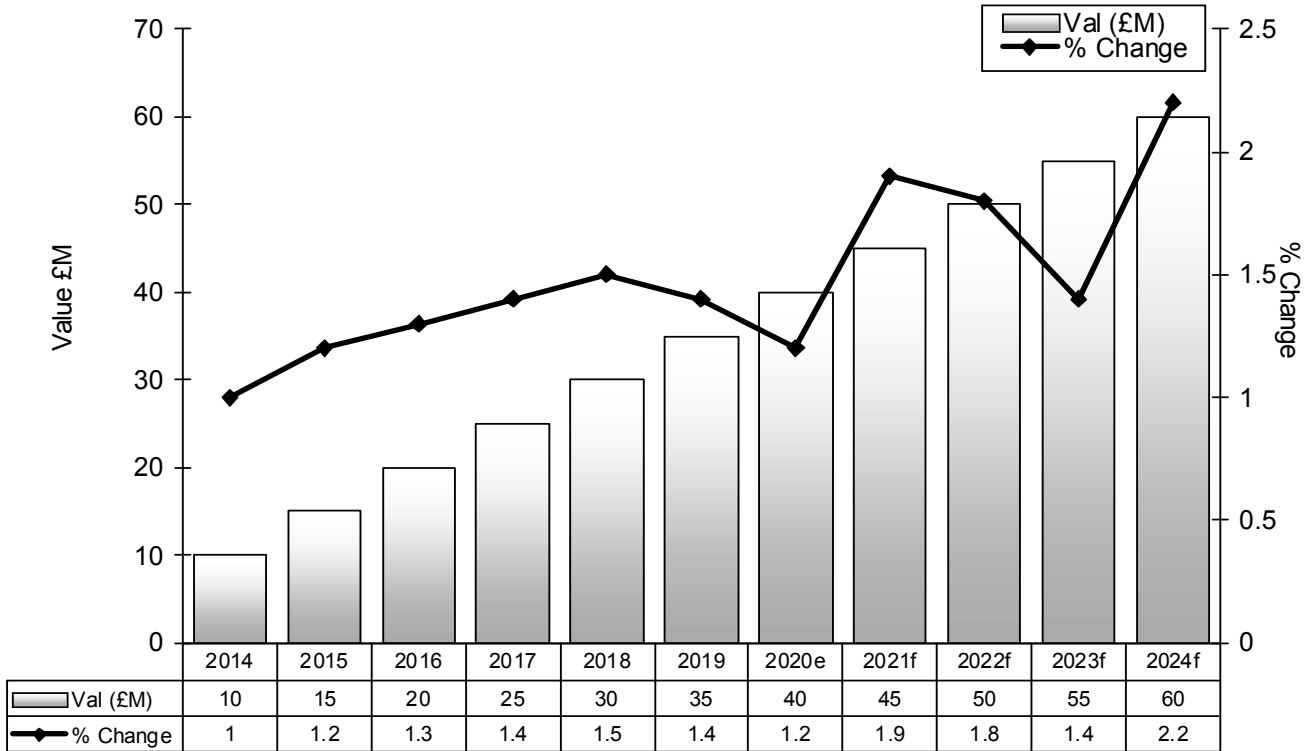
xxx xxxxx xxx xxxxx xxx xxxxx accounts for just over 9% of the total outsourcing market, with sales in 2020 estimated at £x billion.

For comparison, the following chart illustrates the historical mix by value for each of the key sectors in 2014:-

2.5.2 Bundled FM / TFM / IFM Services Market Value 2014-2024

The following chart illustrates the performance of the 'bundled' FM sector of the Facilities Management market by value since 2014 and forecasts to 2024 (Figures Changed for Sample):-

Figure 22: 'Bundled' FM & TFM / IFM Market by Value 2014-2024 £M



Source: MTW Research / Trade Estimates

The 'bundled' FM services market comprises a wide range of services and for the purposes of this report is also referred to as Total Facilities Management or 'TFM' or Integrated Facilities Management 'IFM' where a comprehensive range of service solutions are provided to a client.

Until 2020, this sector primarily operated on a xxx xxxxx of xxx xxxxx xxx xxxxx of xxx xxxxx and providing xxx xxxxx xxx xxxxx xxx xxxxx for clients than xxx xxxxx xxx xxxxx providers by xxx xxxxx xxx xxxxx for FM services. In recent years, the sector has also sought to develop more sustainable xxx xxxxx xxx xxxxx xxx xxxxx to focus on xxx xxxxx xxx xxxxx xxx xxxxx models and xxx xxxxx, rather than being xxx xxxxx xxx xxxxx xxx xxxxx.

As such, bundled service providers seek to offer xxx xxxxx xxx xxxxx for clients through the provision of services which xxx xxxxx xxx xxxxx xxx xxxxx with the client's xxx xxxxx xxx xxxxx and this area proving increasingly significant in terms of xxx xxxxx xxx xxxxx in the last 2-3 years.

This sector is characterised as a xxx xxxxx xxx xxxxx xxx xxxxx market, exhibiting a general trend of xxx xxxxx xxx xxxxx xxx xxxxx in recent years due to xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx to xxx xxxxx xxx xxxxx xxx xxxxx increases by xxx xxxxx xxx xxxxx whose budgets xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx

However, the impact of the COVID-19 pandemic in 2020 and subsequent mitigation responses by the private and, more importantly, public sector are indicated to have xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx few months, as speed of response xxx xxxxx xxx xxxxx margin.

Usual xxx xxxxx xxx xxxxx xxx xxxxx such as those outlined in the `xxx xxxxx xxx xxxxx were xxx xxxxx xxx xxxxx xxx xxxxx and awarded contracts at xxx xxxxx across a number of disciplines. In all, around xxx xxxxx contracts were awarded in response xxx xxxxx xxx xxxxx some £xx billion between March and August 2020.

For example, xxx xxxxx xxx xxxxx companies able to respond quickly in Q2 and Q3 2020 xxx xxxxx from the xxx xxxxx need xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx etc.

Whilst xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx contracts, particularly those with greater flexibility in terms of xxx xxxxx xxx xxxxx xxx xxxxx delivery experienced a xxx xxxxx xxx xxxxx in 2020, much of this was xxx xxxxx by xxx xxxxx spending by the xxx xxxxx xxx xxxxx. As a result, the bundled outsourcing sector xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx FM market in 2020, reflecting a reversal of the 2019 trend when the sector's xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx

To year end December 2020, bundled FM/TFM service provision is set to be worth just under £xx billion, reflecting a xxx xxxxx xxx xxxxx %. Whilst this equated to a xxx xxxxx xxx xxxxx xxx xxxxx of around £1.9 billion, this performance represented a sector which xxx xxxxx the overall outsourcing market by some margin. Between xxx xxxxx and 2020, whilst the total outsourcing market xxx xxxxx xxx xxxxx by just under x%, the bundled outsourcing sector xxx xxxxx in value by more than x%.

Whilst this rapid rate of

Key influencing factors for this sector include:-

- xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx
- xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx xxx xxxxx
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There are, however, some xxxxxxxx in the specification of bundled FM services, including:-

- XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX
- XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX
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- XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX
- XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX XXX XXXXX
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The bundled services sector is likely to continue to

2.6 FACILITIES MANAGEMENT END USER / CHANNEL MIX

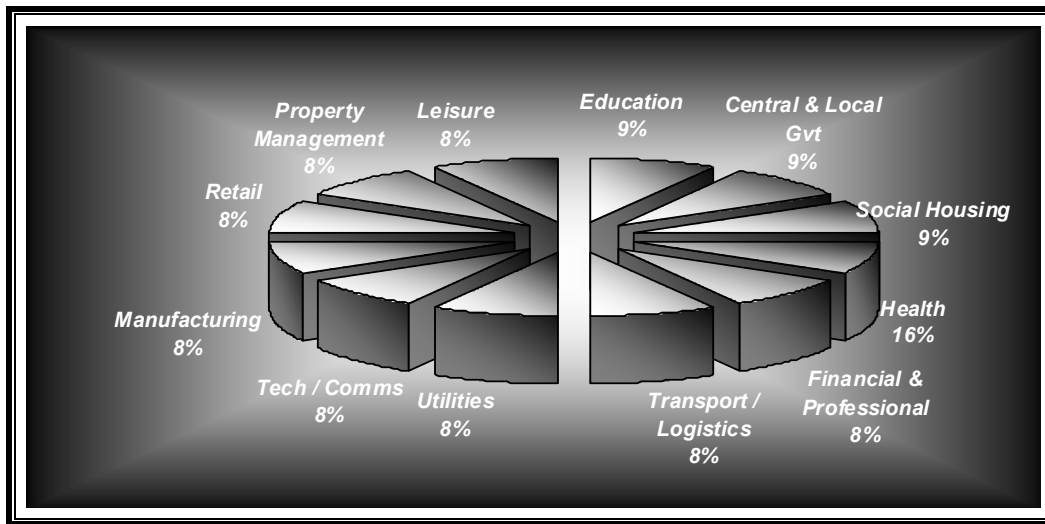
The following section identifies the key end use target markets for the UK Facilities Management industry and provides an illustration of historical market share in 2014, current share for 2020 and provides a forecast share for 2024.

2.6.1 Share by Key End Use Market 2014, 2020 & 2024

The Facilities Management market comprises of a wide range of end use markets, each with varying levels of demand and key market influences therein across both private and publicly funded sectors.

The following table illustrates our estimates of the current share accounted for by these sectors in 2020 by value (Figures Changed for Sample):-

Figure 31: Share by Key End Use Sector in Facilities Management Market 2020



Source: MTW Research / Trade Sources

As the above chart illustrates, the xxxxxx and xxxxxx sectors currently represent the largest key client groups for FM companies in 2020, with x% and x% share respectively reflecting sales of around £x billion combined.

The third largest segment in 2020 is the xxxxxx sector which is currently valued at just over £x billion and accounting for just under x% of the total market. These three key end use markets combined account for some £x billion of sales in 2020 representing x% of the total UK FM outsourcing market.

xxxxxx & xxxxxx also represent a major end use sector, xxxxxx this segment has xxxxxx xxxxxx share during 2020 as a result of the COVID-19 pandemic. xxxxxx the sector xxxxxx to account for x% of the total FM outsourcing market, reflecting a value of more than £x billion.

Demand from the xxxxxx xxxxxx xxxxxx end use sector has exhibited xxxxxx share xxxxxx in recent years, xxxxxx by rapid xxxxxx in areas such as xxxxxx on xxxxxx, xxxxxx, xxxxxx xxxxxx xxxxxx etc. In 2020, sales to this sector are valued at £x billion, accounting for just over x% of the total outsourcing market.

Spending on FM services by

The following section ranks the companies identified by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation. Whilst we try to ensure all major companies are included, the inclusion or otherwise of a company in this report does not necessarily reflect its position in the UK FM market.

4.2 Facilities Management Contractors Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 42: Facilities Management Companies Ranked By Turnover 2019

1	Sample Co	37	Sample Co	73	Sample Co
2	Sample Co	38	Sample Co	74	Sample Co
3	Sample Co	39	Sample Co	75	Sample Co
4	Sample Co	40	Sample Co	76	Sample Co
5	Sample Co	41	Sample Co	77	Sample Co
6	Sample Co	42	Sample Co	78	Sample Co
7	Sample Co	43	Sample Co	79	Sample Co
8	Sample Co	44	Sample Co	80	Sample Co
9	Sample Co	45	Sample Co	81	Sample Co
10	Sample Co	46	Sample Co	82	Sample Co
11	Sample Co	47	Sample Co	83	Sample Co
12	Sample Co	48	Sample Co	84	Sample Co
13	Sample Co	49	Sample Co	85	Sample Co
14	Sample Co	50	Sample Co	86	Sample Co
15	Sample Co	51	Sample Co	87	Sample Co
16	Sample Co	52	Sample Co	88	Sample Co
17	Sample Co	53	Sample Co	89	Sample Co
18	Sample Co	54	Sample Co	90	Sample Co
19	Sample Co	55	Sample Co	91	Sample Co
20	Sample Co	56	Sample Co	92	Sample Co
21	Sample Co	57	Sample Co	93	Sample Co
22	Sample Co	58	Sample Co	94	Sample Co
23	Sample Co	59	Sample Co	95	Sample Co
24	Sample Co	60	Sample Co	96	Sample Co
25	Sample Co	61	Sample Co	97	Sample Co
26	Sample Co	62	Sample Co	98	Sample Co
27	Sample Co	63	Sample Co	99	Sample Co
28	Sample Co	64	Sample Co	100	Sample Co
29	Sample Co	65	Sample Co	101	Sample Co
30	Sample Co	66	Sample Co	102	Sample Co
31	Sample Co	67	Sample Co	103	Sample Co
32	Sample Co	68	Sample Co	104	Sample Co
33	Sample Co	69	Sample Co	105	Sample Co
34	Sample Co	70	Sample Co	106	Sample Co
35	Sample Co	71	Sample Co	107	Sample Co
36	Sample Co	72	Sample Co		

Source: MTW Research / Trade Sources

Trading Name	2019 Turnover £M
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
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Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx

Trading Name	2019 Turnover £M
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
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Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx
Sample Co	£xx

Source: MTW Research / Trade Sources

4.3 FM Companies Ranking by Profitability

The following table illustrates our estimates of the rank by profit for each of the FM providers in 2020:-

Figure 44: Facilities Management Companies Ranked By Profit 2020

1	Sample Co	37	Sample Co
2	Sample Co	38	Sample Co
3	Sample Co	39	Sample Co
4	Sample Co	40	Sample Co
5	Sample Co	41	Sample Co
6	Sample Co	42	Sample Co
7	Sample Co	43	Sample Co
8	Sample Co	44	Sample Co
9	Sample Co	45	Sample Co
10	Sample Co	46	Sample Co
11	Sample Co	47	Sample Co
12	Sample Co	48	Sample Co
13	Sample Co	49	Sample Co
14	Sample Co	50	Sample Co
15	Sample Co	51	Sample Co
16	Sample Co	52	Sample Co
17	Sample Co	53	Sample Co
18	Sample Co	54	Sample Co
19	Sample Co	55	Sample Co
20	Sample Co	56	Sample Co
21	Sample Co	57	Sample Co
22	Sample Co	58	Sample Co
23	Sample Co	59	Sample Co
24	Sample Co	60	Sample Co
25	Sample Co	61	Sample Co
26	Sample Co	62	Sample Co
27	Sample Co	63	Sample Co
28	Sample Co	64	Sample Co
29	Sample Co	65	Sample Co
30	Sample Co	66	Sample Co
31	Sample Co	67	Sample Co
32	Sample Co	68	Sample Co
33	Sample Co	69	Sample Co
34	Sample Co	70	Sample Co
35	Sample Co	71	Sample Co
36	Sample Co		

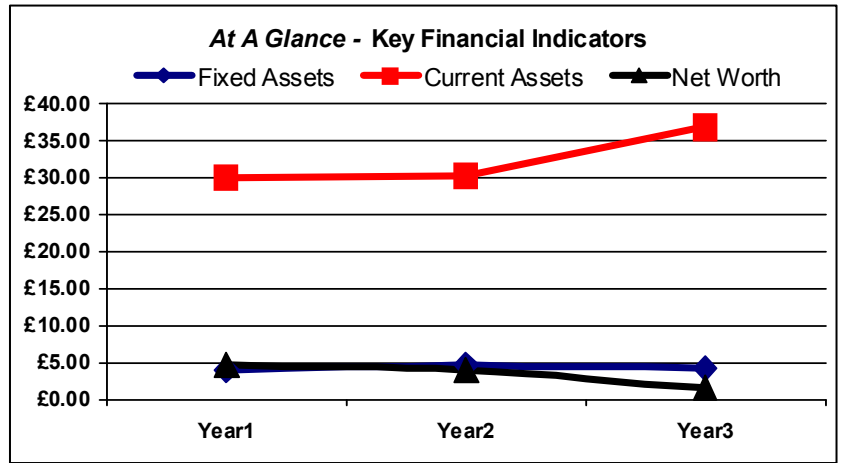
Source: MTW Research / Company Accounts

The following chapter illustrates the key financial indicators for the selected companies active in the UK FM industry, along with an 'at a glance' chart, illustrating the recent performance of each company. Turnover and profit estimates are also provided for each company alongside a brief description of activities, estimate of number of employees and contact details.

4. FM CONTRACTOR PROFILES & 'AT A GLANCE' FINANCIALS

Sample Co UK Limited - Company Overview & 'At a Glance'

Sample Address
Sample
Sample
Sample
Tel:



Sample UK Limited is a private limited company, incorporated on 6th November 1997. The company's main activities are recorded by Companies House as "Offer Of A National Facilities Management Service (predominately soft services) To A Broad Range Of

Blue Chip Companies In The Commercial, Retail And Industrial Sectors in The Market Place." In 2020, the company has an estimated 4425 employees.

To year end December 2019, Sample UK Limited is estimated to have achieved a turnover of around £129 million. Pre-tax profit for the same period is estimated at around £2.40 million.

The following table briefly provides a top line overview on Sample UK Limited:-

Company Name	Sample UK Limited
Brief Description of Activities	Offer Of A National Facilities Management Service (predominately soft services) To A Broad Range Of Blue Chip Companies In The Commercial, Retail And Industrial Sectors in The Market Place.
Parent Company	Sample Inc
Ultimate Holding Company	Sample Inc
Estimated Number of Employees	4425
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last 3 years:-

Sample UK Limited - 3 Year Financials to Year End 31-Apr-20

Key Indicator £M	Year End 31-Apr-18 (Year1) £M	Year End 31-Apr-19 (Year2) £M	Year End 31-Apr-20 (Year3) £M
Fixed Assets	£4.01	£4.58	£4.22
Current Assets	£30.04	£30.3	£36.9
Current Liabilities	£31.48	£32.09	£36.4
Long Term Liabilities	£4.1	£4.1	£4.1
Net Worth	£4.63	£3.94	£1.52
Working Capital	£1.43	£1.79	£0.5
Profit per Employee	£0.001	£0.0	£0.001
Sales per Employee	£0.024	£0.027	£0.028

