

# The German Cleaning and Hygiene Market

Market Snapshot



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## Market Snapshot

### Sales Development in the Building Cleaning Sector (Bn. EUR)



### Main Market Players

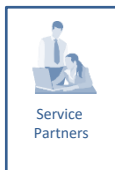
#### External Service



#### In-house Service



### Commercial Entities

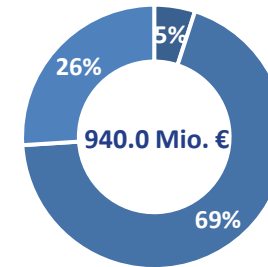


### Market Segments



In Germany, 79 percent of maintenance cleaning and 92 percent of window and glass cleaning are outsourced. This significantly minimizes growth potential in the market.

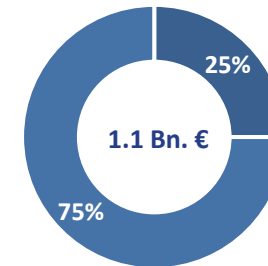
### Cleaning Machines Market Volume & Sales Channels (2018)\*



- Online
- Direct Sales
- Retail

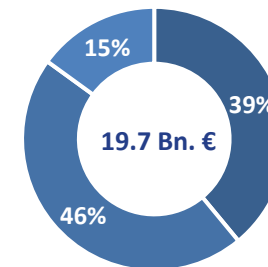
\*Exportanteil liegt bei 73%, Weltmarktanteil deutscher Hersteller: 20%

### Cleaning Chemicals Market Volume (2019)



- Building Cleaning
- Others: incl. Kitchen / Food & OPL

### Building Cleaning Revenue Structure by Company Size

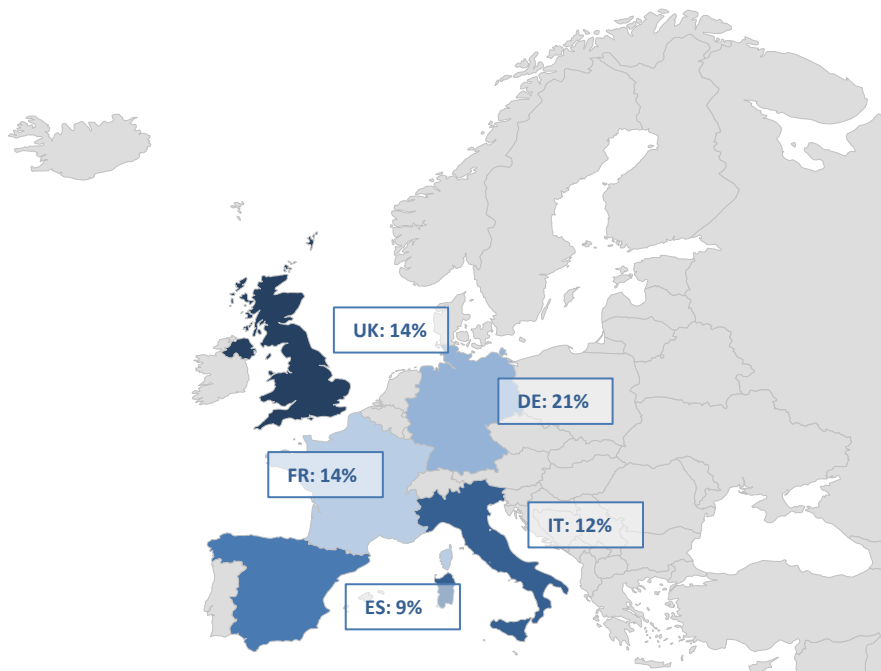


- Large Companies
- Medium-sized Companies
- Small Companies (Revenue >0.5 Mio. €)

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### The German Cleaning Market Compared to Europe



- With growth of around 7.7 percent, the European cleaning market achieved total sales of around € 120 billion in 2018.
- The five largest markets in Europe, including Germany as number 1, accounted for around 70 percent of sales in 2018.
- In 2017, around 284,000 companies across Europe were active in the industry with nearly 4.1 million employees.
- Among the European countries there are great differences in industry structures and the degree of cleaning evolution and innovation.

### Top Trends in the German Cleaning Market



Impact of the Corona Pandemic



Staff Shortage and Qualification



Sustainability



Use of Robotics



Digitalization



Cleaning Process Automation

### Leading Building Cleaning Companies in DE (2019)

Name	Revenue (Mio. €)	Employees (in DE)
Wisag Facility Service Holding GmbH	1,167.9	32,187
Gegenbauer Holding SE & Co. KG	744.0	17,923
ISS Facility Services Holding GmbH	655.1	12,671
Piepenbrock Facility Management GmbH + Co. KG	617.9	26,600
Dussmann Service Deutschland GmbH	569.0	20,600
Kötter Unternehmensgruppe	565.0	18,800
Klüh Service Management GmbH	548.0	20,136
Stöltzing Service Group GmbH	194.0	7,700
Dr. Sasse AG	190.0	4,800
Dorfner Gruppe	181.0	7,274



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