



**DTO**

B2B Research & Strategies

# Cleaning Snapshot

German Commercial Cleaning Market  
2025



# Market Size and Growth Rate

## Key Market Facts

676,593

The number of employees employed in the German building cleaning industry

-1.6%

Change in the number of employees in the cleaning market

8.5%

Change in the Number of Companies from 2022

31,802

The number of companies in the cleaning market in Germany

## Market Segments and Players

### External Services Providers (BSCs)



- Cleaning companies (BSCs)

### Inhouse-Cleaning



- Municipalities



- HORECA



- HealthCare



- Industry



- Rental services

### Distributors and trade entities

- Manufacturers
- Service-partners
- Distributors

# Market Dynamics and Outsourcing Trends in the Cleaning Industry

## External Services Providers (BSCs)

Proportion of Companies by Size



Revenue Distribution by Company Size



### Key Points:

- **Market Concentration:** Large companies, representing only 2% of the total firms, account for 54% of the industry's revenue, highlighting a highly concentrated market dominated by a few main players.
- **Small Business Prevalence:** Small businesses make up 80% of the industry but contribute just 13% of total revenue, highlighting the challenges smaller firms face in scaling their operations.
- **Medium-Sized Firms as Key Contributors:** Medium-sized companies, comprising 18% of the market, generate 33% of total revenue, demonstrating their significant role in the industry's financial ecosystem.

Content DTO – B2B Research & Strategies (2025), Issworld (2025), Pipenbrock (2025), Klueh (2025)

## Inhouse-Cleaning Transition

Traditionally, many organizations, especially hospitals, government institutions, and large corporations, maintained their own cleaning staff. However, over time, the proportion of in-house cleaning teams has steadily declined, with outsourcing now accounting for 65% of all cleaning services in Germany. This allows companies to reduce their expenses, increase efficiency and increase the levels of flexibility.

Below are examples of major German companies that have transitioned to outsourcing their cleaning services, **leveraging cost savings, improved efficiency, and greater flexibility;**



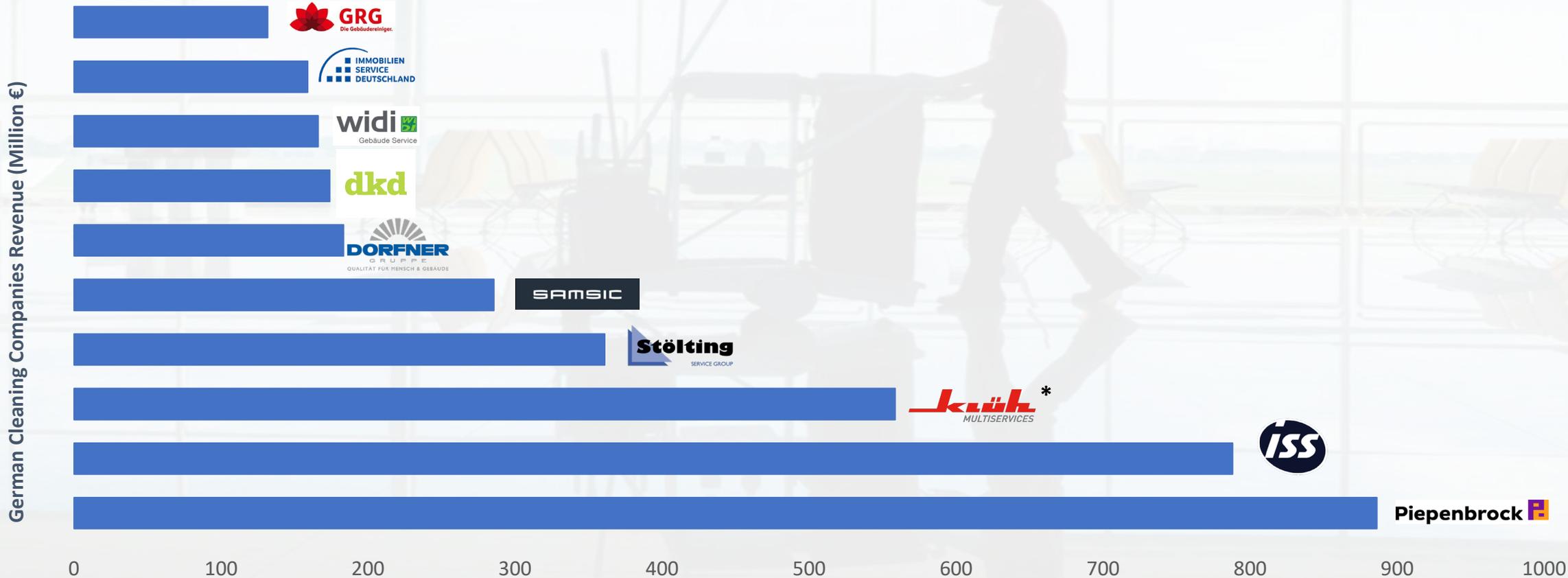
Lufthansa

SIEMENS



# Cleaning Industry in Germany

## German Cleaning Companies Ranking 2023



\*Revenue calculated based on Cleaning and Clinic Service Sector

# Industry Development Status and Trends

## Industry Trends



Effects of the corona crisis



Staff shortages and training



Sustainability



Robotics



Digitalization



Automatization of cleaning processes

## Main Distributor Chains in Germany



## Latest News

- The Stölting Service Group acquired Dirk Müller Gebäudedienste GmbH on April 2024, a North Rhine-Westphalia-based cleaning and facility services provider with 2,000 employees and an annual turnover of €35 million, specializing in building cleaning, hygiene services for retirement homes, janitorial work, and personnel services.
- On February 21, 2025, Netherlands-based floor pads specialist R & T acquired German pads producer Dolly. This acquisition aims to strengthen R & T's position in German-speaking markets and reinforce its presence across Europe.
- The German cleaning services market is projected to reach approximately €41.1 billion by 2030, growing at a compound annual growth rate (CAGR) of 5.9% from 2023 to 2030. Similarly, the contract cleaning services segment is expected to grow from €21.1 billion in 2023 to €32.2 billion by 2030, with a CAGR of 6.2%.
- PHM Group has recently enhanced its presence in the Munich metropolitan area by acquiring two companies: GE Service Dienstleistungen GmbH and GeMoBau GmbH. This strategic move aims to bolster PHM's market position in southern Germany, reflecting the company's commitment to growth in the region.

# Main Distributor Chains in Germany

## Distributor Chains in Details



**Company:** Igefa SE & Co. KG  
**Headquarters:** Neumünster, Germany  
**Website:** www.igefa.de



**Company:** Igefa SE & Co. KG  
**Headquarters:** Neumünster, Germany  
**Website:** www.igefa.de



**Company:** Igefa SE & Co. KG  
**Headquarters:** Neumünster, Germany  
**Website:** www.igefa.de

### Focus Areas

- Focus on professional cleaning and hygiene across professional end-user segments (e.g., FMC, healthcare, hospitality, government, etc.).
- Significant focus on foodservice through Ecolab distribution partnership.

### Focus Areas

- Focus on professional cleaning and hygiene across professional end-user segments (e.g., FMC, healthcare, hospitality, government, etc.).
- Distribution partnership e.g. with Columbus, Numatic, Cleanfix or Diversey

### Focus Areas

- Focus on professional cleaning and hygiene across professional end-user segments (e.g., FMC, healthcare, hospitality, government, etc.).
- Partnership with Numatic or Ice Robotics. Under brand Mtech also private label machines

### Key Insights

- Igefa has 28 locations in Germany with associated warehouses as well as 3,000 employees serving more than 500,000 customers. They carry more than 350,000 products, 15% of which carry a sustainability label.
- Outside of Germany, Igefa has network locations in Denmark (Toprent), the Netherlands (Hazet), Austria (Arndt) and Poland (Henry Kruse).
- Igefa is a member of the international INPACS network.

### Key Insights

- GVS has 15 members with 31 locations across Germany. They offer more than 120,000 products and employ 140 specialist advisors.
- GVS is a member of the European trade group DHYS, which is a collaboration between 15 autonomous professional cleaning and hygiene trading groups with access to 130 members in 35 countries.

### Key Insights

- Network of 28 independent, medium-sized, owner-managed specialist wholesalers with approximately 40 locations across Germany.
- The central headquarters is responsible for negotiating supply contracts on behalf of all members.
- Members are permitted to enter contracts with suppliers who are not part of the Mobiloclean network.

# Contact

## Our locations



Headquarters  
**Düsseldorf**



**DTO Consulting GmbH**

Benrather Schloßallee 33  
40597 Düsseldorf  
Germany

**Phone:** +49 (0)211 17966 00  
**E-mail:** info@dto-research.de

DTO America  
**Charlotte, NC**



**DTO B2B Research & Strategies Inc.**

112 S Tryon St. STE 1130  
Charlotte, North Carolina 28284  
USA

**Phone:** +1 (704) 333-7790  
**E-mail:** info@dto-research.com

DTO France  
**Paris**



**DTO B2B Research & Strategies**

10 Avenue Kleber  
75116 Paris  
France

**Phone:** +33 1 56 03 65 45  
**E-mail:** info@dto-research.fr

DTO Baltic  
**Tallinn**



**DTO B2B Research & Strategies**

Laeva 2  
Tallinn 10111  
Estonia

**Phone:** +372 5069 137  
**E-mail:** info@dto-research.ee

DTO Asia  
**Singapore**



**DTO B2B Research & Strategies Ltd. Pte.**

German Centre for Industry and Trade  
25 International Business Park Rd  
Singapore 609916

**Phone:** +65 9773 9088  
**E-mail:** info@dto-research.sg