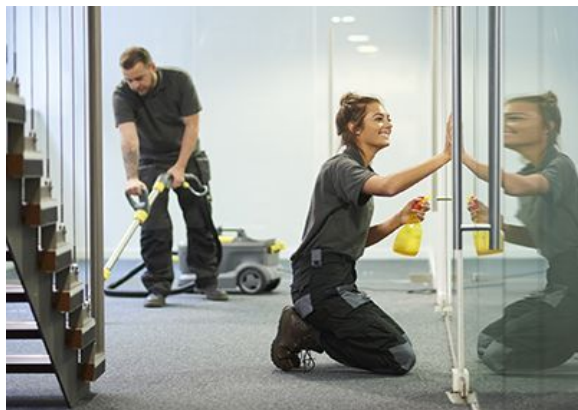


## Facilities Management - UK - October 2017

Report Price: £995.00 | \$1333.00 | €1128.23

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Integrated facilities management companies are looking to leverage data gathering and analysis to add value to their services, retain greater loyalty, and move beyond the intensely competitive and margin-squeezed single service supply, with the cloud and mobile data revolutionising access to management information.”

– **Terry Leggett, Senior B2B Analyst**

This report looks at the following areas:

- How are changes in minimum wages affecting the facilities management sector?
- How are facilities management companies differentiating their services to avoid the price pressure of commoditisation?
- How will Brexit affect the sector?
- Will growth in total facilities management contracts grow ahead of single or other multiple service bundles over the next five years?
- What sectors are likely to generate the greatest demand for facilities management services in the next few years?

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](http://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Facilities Management - UK - October 2017

Report Price: £995.00 | \$1333.00 | €1128.23

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Executive Summary

#### The market

Figure 1: Integrated facilities management market in the UK, 2012-16 actual and 2017-21 forecast

Figure 2: Integrated facilities management market measured against total market potential, 2012-16 actual and 2017-21 forecast

Figure 3: Single services or bundled services that are outsourced, 2012-16 actual and 2017-21 forecast

Figure 4: Segmentation of the contracted out services in the UK, by sector, 2016

#### Market factors

Figure 5: National living wage, 2016-17

#### Companies

Figure 6: Analysis of the changes in the structure of the combined facilities support activities industry, 2013-17

#### What we think

### Key Insights

How will Brexit affect the industry?

What is the overriding industry trend?

How is M&A activity changing?

### Introduction

Definitions

Methodology

Abbreviations

Issues in the market

Market positioning

### UK Economy

#### Overview

Figure 7: Forecast GDP development 2017-21

Figure 8: UK GDP quarterly development, 2004-17

#### Inflation

#### House prices

Figure 9: UK House price changes, 2006-17

#### Interest rates

#### Consumer spending

#### Manufacturing

Figure 10: UK manufacturing, 2014-17

#### Business investment

Figure 11: UK GFCF 2003-17

#### Imports

#### Exports

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Facilities Management - UK - October 2017

Report Price: £995.00 | \$1333.00 | €1128.23

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Market Factors

Macro drivers

## Market Size

Key points

The market

Figure 12: Potential market for facilities management services in the UK, 2012-16

Figure 13: Actual market for integrated facilities management services in the UK, 2012-16

Figure 14: Comparison of the actual market for facilities management services compared with the potential market in the UK, 2012-16

## Market Segmentation

Key points

Market segmentation

Figure 15: Segmentation of the potential market for facilities management services in the UK, by type of contract, 2012-16

Figure 16: Segmentation of the potential market for facilities management services in the UK, by type of contract, 2016

Figure 17: Segmentation of the market for TFM and contracted out facilities management, by type of service, 2012-16

Figure 18: Segmentation of the contracted out services in the UK, by sector, 2016

## Market Trends

Key points

Market trends

Minimum wage and pension regulation growth squeeze margins

Figure 19: National minimum wage, 2010-15

Figure 20: National living wage, 2016-17

Figure 21: Composition and progression of workplace pension contributions, 2012-17

Continued evolution towards total facilities management and strategic partnerships

Constant re-definition of opportunities

Technology and data management advances

## Industry Structure

Key points

Industry development

Figure 22: Analysis of the changes in the structure of the combined facilities support activities industry, 2013-17

Structure by employment

Figure 23: Analysis of the employment structure of the combined facilities support activities industry, 2016 and 2017

Structure by turnover

Figure 24: Analysis of the financial structure of the combined facilities support industry, 2016 and 2017

Company profiles

## Amey

Figure 25: Financial analysis of Amey UK, 2012-16

Figure 26: Turnover analysis of Amey UK, by sector, 2016

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Facilities Management - UK - October 2017

Report Price: £995.00 | \$1333.00 | €1128.23

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company strategy

## Aramark

Figure 27: Financial analysis of Aramark, 2012-16

Company strategy

## CBRE GWS

Figure 28: Financial analysis of CBRE GWS, 2012-15

Company strategy

## Compass Group

Figure 29: Financial analysis of Compass Group, 2012-16

Company strategy

## Cordant Group

Figure 30: Financial analysis of Cordant Group, 2012-16

Company strategy

## Emcor Group (UK)

Figure 31: Financial analysis of EMCOR Group (UK), 2012-16

Company strategy

## G4S

Figure 32: Financial analysis of G4S, 2012-16

Figure 33: Turnover analysis of G4S, by activity, 2016

Figure 34: Turnover analysis of G4S, by region, 2016

Company strategy

## ISS Facility Services

Figure 35: Financial analysis of ISS Facility Services, 2012-16

Company strategy

## Interserve

Figure 36: Financial analysis of Interserve, 2012-16

Figure 37: Operating profit segmentation of Interserve, 2016

Figure 38: Turnover segmentation of Interserve, 2016

Company strategy

## Mitie Group

Figure 39: Financial analysis of Mitie Group, 2013-17

Figure 40: MITIE Group revenue by sector, 2017

Company strategy

## Norse Group

Figure 41: Financial analysis of the Norse Group, 2013-17

Figure 42: Turnover analysis of the Norse Group, 2017

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Facilities Management - UK - October 2017

Report Price: £995.00 | \$1333.00 | €1128.23

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Company strategy

### OCS Group

Figure 43: Financial analysis of the OCS Group, 2013-17

## Company strategy

### Serco Group

Figure 44: Financial analysis of Serco Group, 2012-16

Figure 45: Turnover analysis of Serco Group, 2016

## Company strategy

### Sodexo

Figure 46: Regional breakdown of Sodexo turnover, 2016

Figure 47: Breakdown of Sodexo turnover, by sector, 2016

Figure 48: Financial analysis of Sodexo, 2012-16

## Company strategy

### VINCI Facilities

Figure 49: Financial analysis of VINCI PLC, 2012-16

Figure 50: Turnover development of VINCI Facilities UK, 2012-16

## Company strategy

### Demand Structure

#### Key points

#### Construction output

Figure 51: Analysis of construction output in Great Britain, by type, 2012-16

Figure 52: Forecast construction output in Great Britain, by type, 2017-21

#### Repair and maintenance

Figure 53: Analysis of repair & maintenance output in Great Britain, by type, 2012-16

Figure 54: Forecast repair & maintenance output in Great Britain, by type, 2017-21

#### PPPs

Figure 54: Capital costs of current UK PFI projects, by department, 2012-16

Figure 55: Estimated nominal payments under current PFI contracts, 1993-2051

#### Distribution of workplaces

Figure 56: Number of UK PAYE/VAT-registered business establishments by industry by public and private sectors, 2013-17

### Forecast

#### Key points

#### Potential market size

Figure 57: Forecast actual market for integrated facilities management services in the UK, 2017-21

#### Market segmentation

Figure 58: Forecast segmentation of the potential market for facilities management services, by type of contract, 2017-21

Figure 59: Forecast segmentation of the market for TFM and contracted out facilities management, by type of service, 2017-21

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

## Facilities Management - UK - October 2017

Report Price: £995.00 | \$1333.00 | €1128.23

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

### Industry

Figure 60: M&A deals in the facilities management industry, by sector, 2014-March 2016

### Further Sources & Contacts

#### Trade associations

British Institute of Facilities Management (BIFM)

The Facilities Management Association

#### Trade magazines

Building and Facilities Management

Building Services and Environmental Engineer

Facilities Management Journal

FM World

Practical Facilities Management

Premises & Facilities Management

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](http://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)