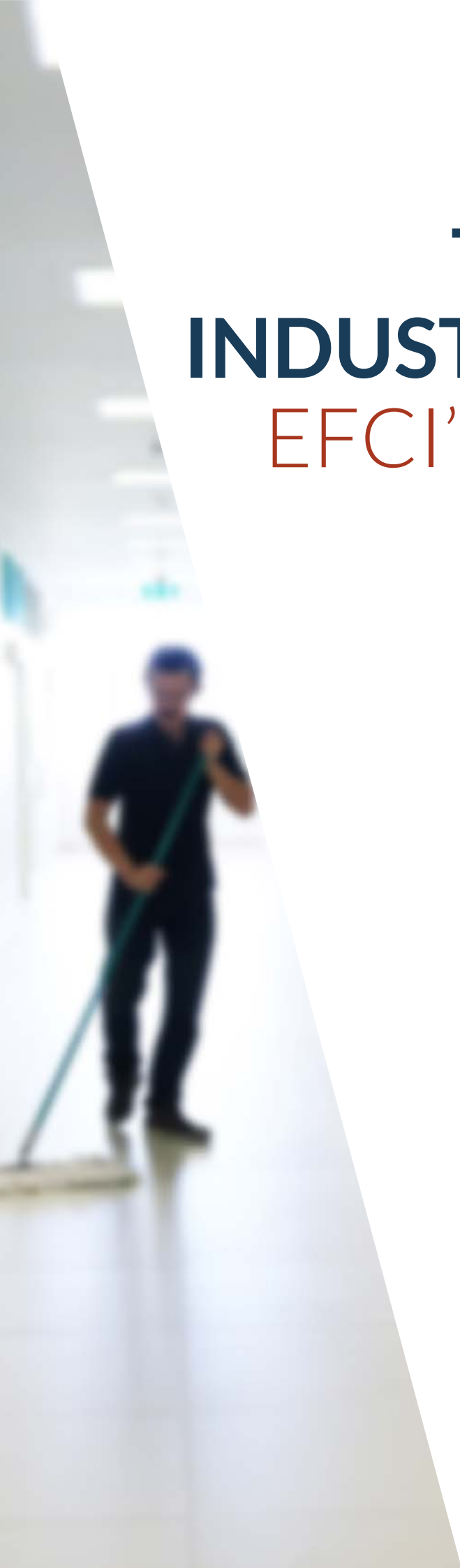


THE CLEANING INDUSTRY IN EUROPE

EFCI'S REPORT 2020



European Cleaning and Facility Services Industry



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The EFCI (www.efci.eu) is an international non-profit association and is the recognised Social Partner by the European Commission for the Industrial Cleaning Sector in Europe. It brings together associations and federations representing the industry at national level. The EFCI is an active member of the European Business Services Alliance (EBSA), the collective voice of the European Business Services Organisations, and an observer member of the European Platform for tackling undeclared work. The EFCI is inscribed in the EU Transparency Register with the number 79863609229-39.

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Foreword

Dear EFCI Members and colleagues,

We are happy to present a new edition, in a new format and analysis depth, of the EFCI annual Survey. Following last year's publication of the Trend Report on the evolution of the industry between 1995-2016, we are now presenting a detailed overview of the most recent data and trends on the main aspects of our industry across Europe.

The cleaning industry, suffering from invisibility during many years, is now (sadly, due to the COVID-19 pandemic) receiving well-deserved recognition. Amidst the uncertainty of our times, it is important to remember the growth and resilience the industry showed over the last two decades: with a steady growth over the recent years, the European cleaning industry now employs 4.1 million people and has reached an impressive turnover of 120 billion euro. Over the last five years, the number of people employed in the industry grew by an impressive 15%.

However, it is still uncertain what the effect of the pandemic on the industry will be. While some sectors may shrink, others - "those who help the world go on turning", in the words of the Commission's President von der Leyen - will continue to grow. At the EFCI, we will continue working to support the cleaning and facility services sector from an EU perspective, by advocating for our industries' needs and promoting them before all our stakeholders and fellow citizens.

Hoping that this Report is useful for our members and stakeholders, warm regards,



Juan Díez de los Ríos
EFCI President

Introduction & Methodology

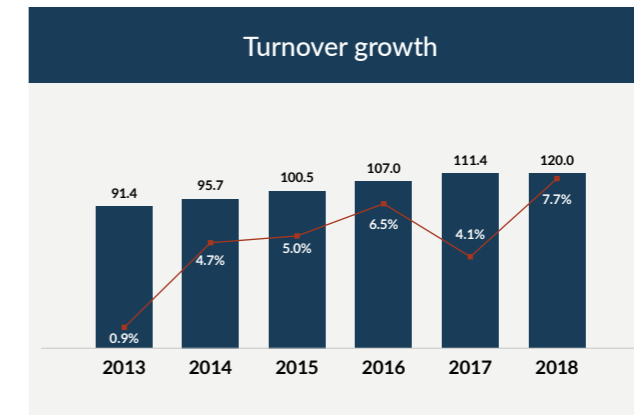
This Report provides an overview of the most important indicators that describe the characteristics of the European cleaning industry*. It contains insights based on the most recently available Eurostat data**. We hope that the analysis contributes to a thorough understanding of the trends and characteristics of the industry.

* The European Cleaning Industry refers to NACE Rev. 2 N81.2; EU 28, Norway and Switzerland.

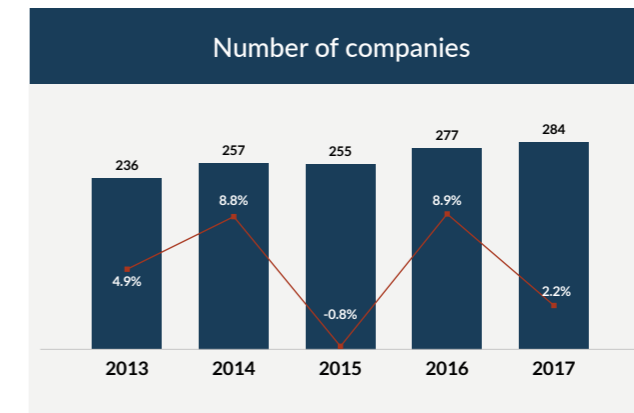
** Eurostat data as available per May 1, 2020.



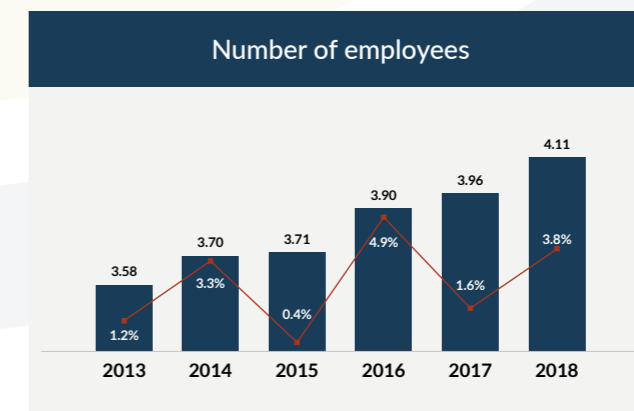
Main Indicators 2015 - 2018



Turnover (in billion EUR) in the European Cleaning Industry and annual increase of turnover (in %).



Number of companies (in thousands) in the European Cleaning Industry and annual increase of number of companies (in %).

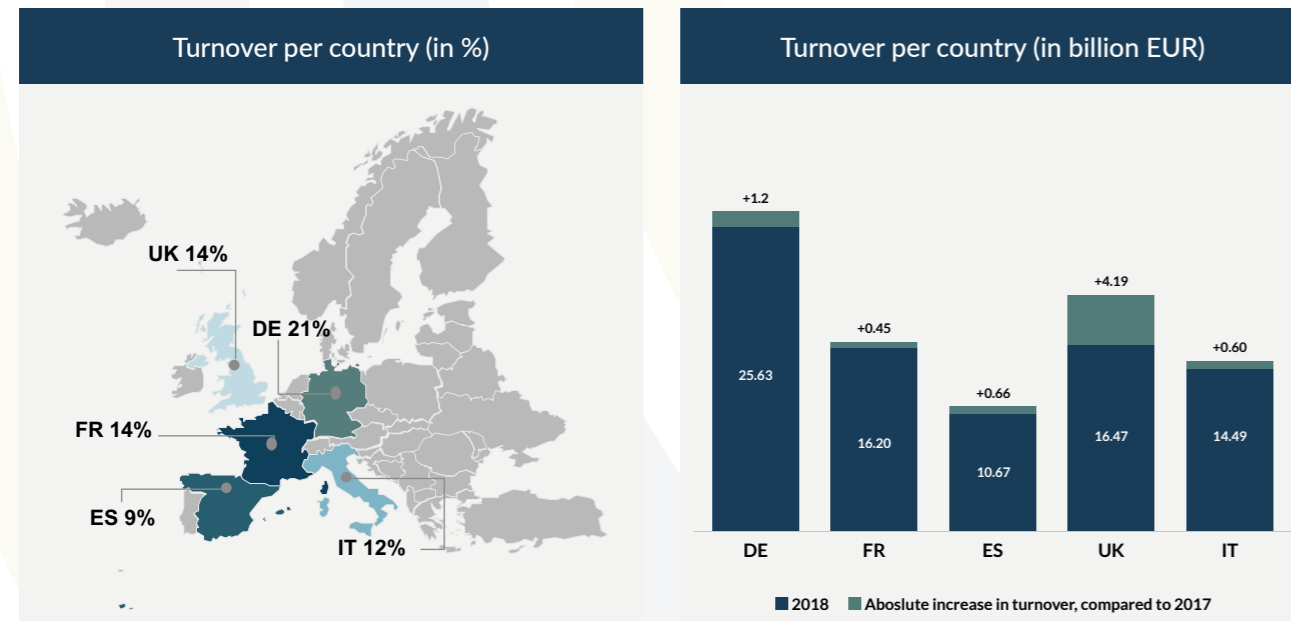


Number of people employed (in millions) in the European Cleaning Industry and annual increase of number of people employed (in %).

Turnover

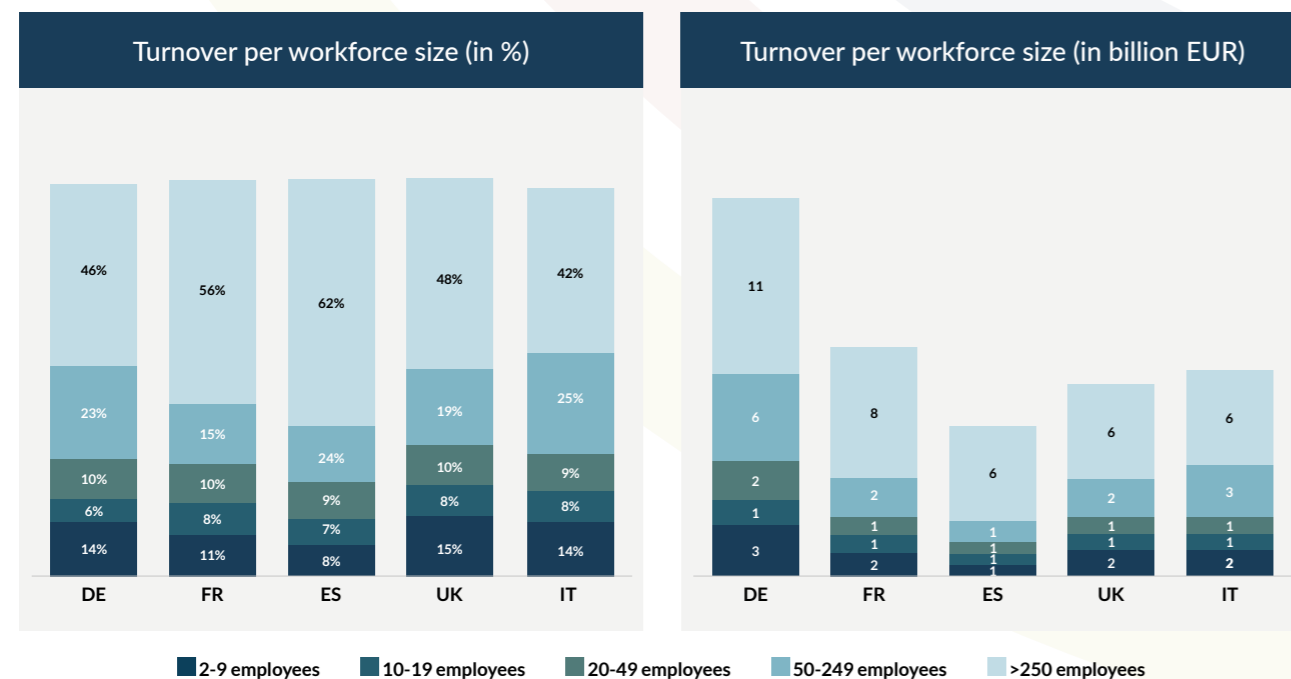
The overall turnover in the European Cleaning Industry grew by 8% to an astonishing 120 billion euro in 2018. France, Germany, Italy, Spain and the United Kingdom are the countries with the largest market share in Europe and are accountable for 70% of the overall turnover, followed by Belgium, the Netherlands and Sweden with each having over 4 billion euro turnover annually. Less than a quarter of the turnover in Europe is generated in other countries.

Across all countries, the industry grew on average by 7%, but some countries showed even stronger growth with more than 4 billion euro increase in the UK.



Small and medium-sized enterprises (SMEs) account for over half of the total turnover in large countries such as Germany, Italy, and the United Kingdom. However, in France and Spain large enterprises do make up for the majority of revenues.

Among the SMEs, companies with between 50 and 249 employees account, on average, for 20% of the total turnover. Again, the share of these companies in the market is lower in France and Spain.

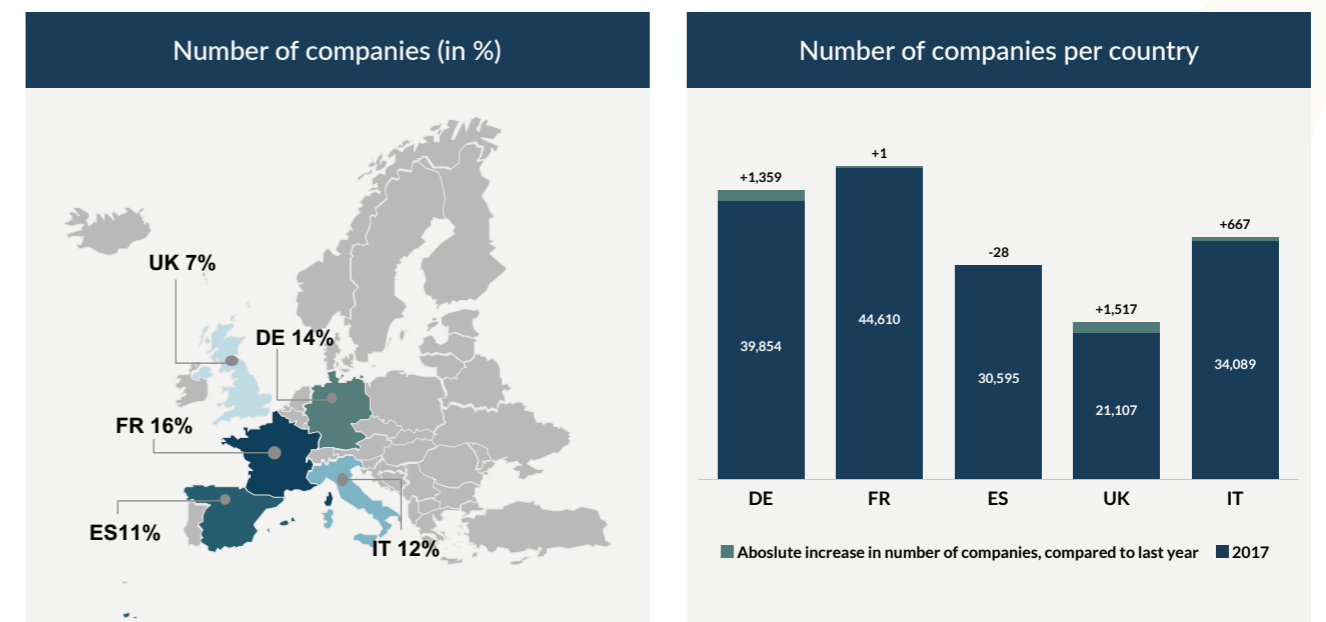


Companies

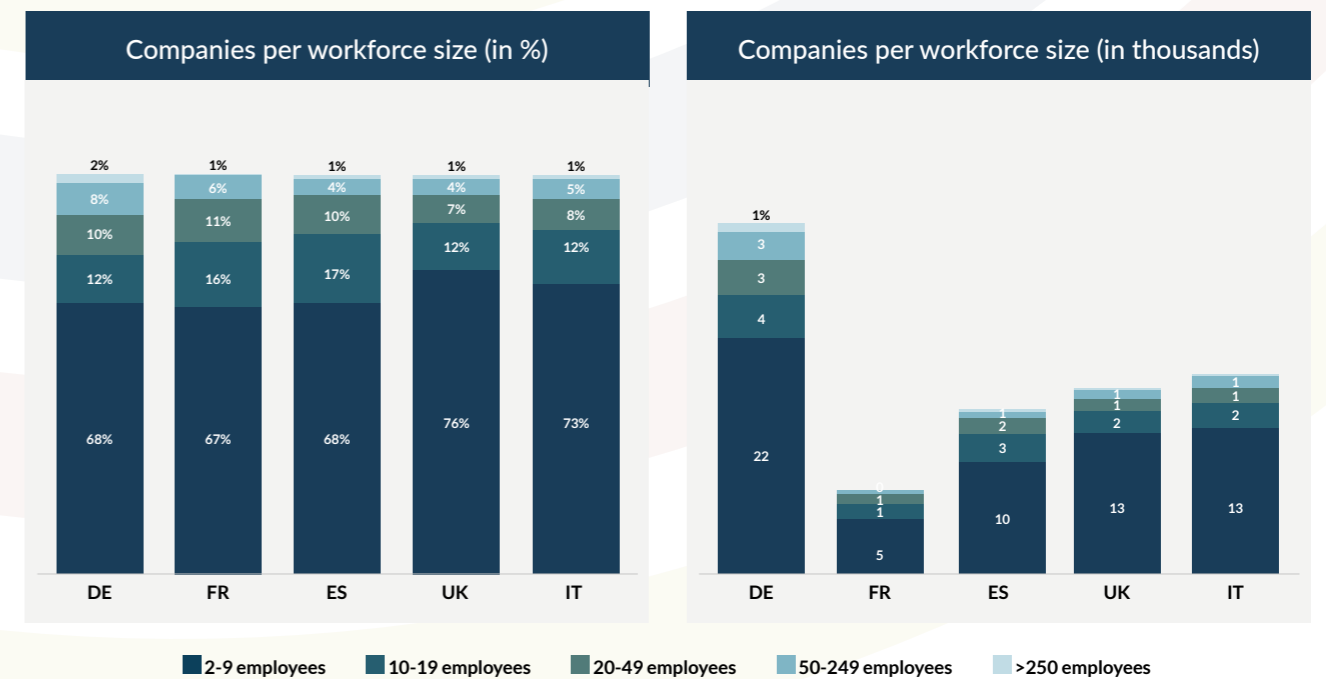
The European Cleaning Industry also grew in number of companies, reaching a total of 283,506.

The increase is largely due to a growth in the number of companies in Germany, Italy and the United Kingdom. In the UK, the number of companies grew by more than 1,500, which were mostly small enterprises with less than 10 employees. Germany also noted a strong growth of 1,300 companies, of which most were self-employed. The number of companies decreased significantly in Belgium (-909) and Greece (-757).

The 5 largest European countries in terms of turnover (totalling 70%) also have the highest number of companies (totalling 60%).



Two thirds of the companies in the cleaning industry in Germany, France and Spain employ 2 to 9 employees whereas the share of these small enterprises is even above three quarters in Italy and the UK. Companies with 10 to 19 employees are more present in France and Spain, representing 16% to 17% of all companies compared to 12% to 13% in the other largest countries.



Employees (1/2)

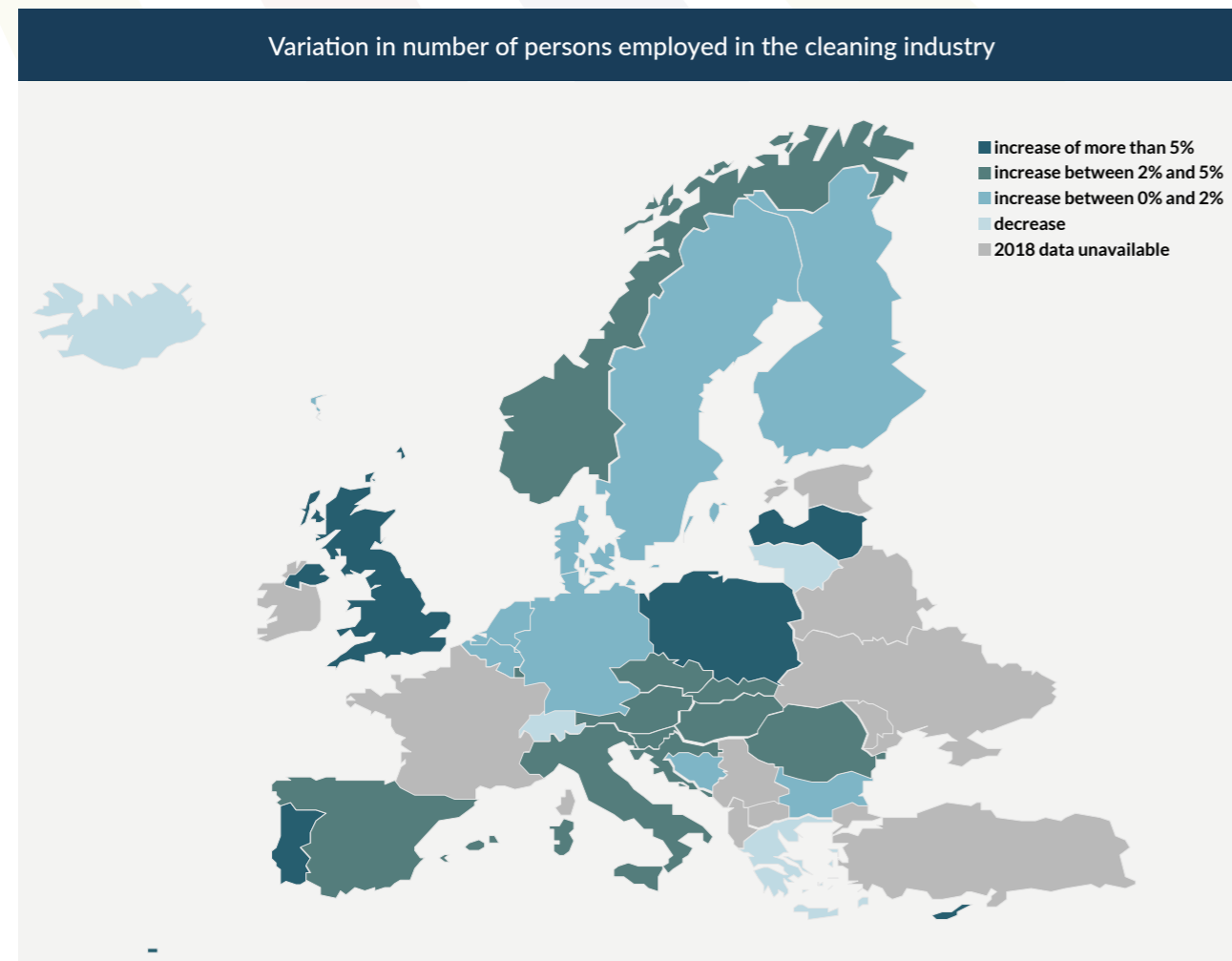
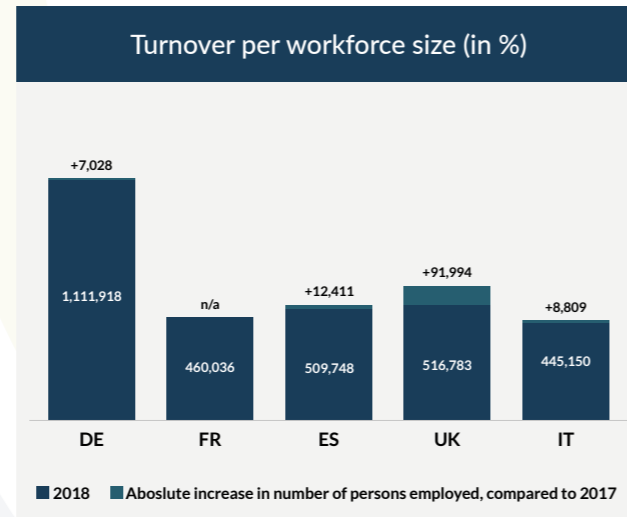
The European Cleaning Industry employs 4.1 million people. Compared to last year, an additional 154 thousand people are now employed in the industry.

With over 1.1 million people, the German cleaning industry employs over a quarter of all workers in the European Cleaning Industry.

The other top 4 countries have employment levels ranging from 445 to 517 thousand. All other European countries account for 23% of all employees in the Cleaning Industry.

Almost all European countries registered an increase in the number of employees.

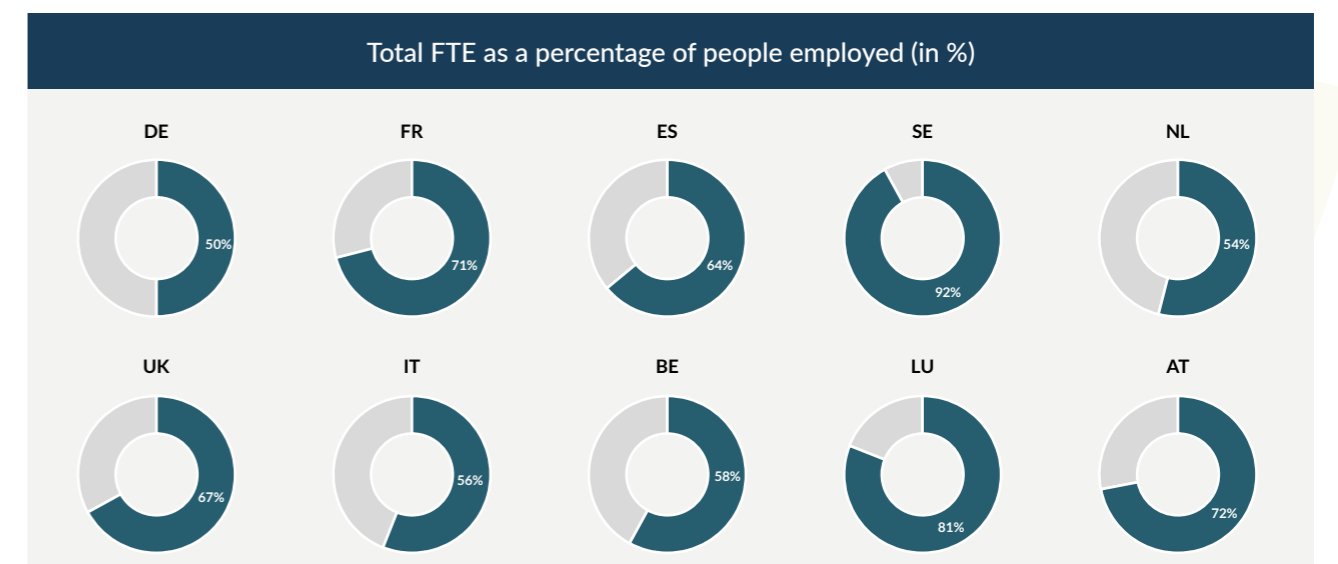
The employment levels in most European countries showed a moderate increase between 2% and 5%. The largest increase was recorded in the United Kingdom (+22%), Portugal (+14%) and Poland (+14%). Lithuania showed the largest decrease(-7%), followed by Switzerland (-6%).



Employees (2/2)

The European Cleaning industry is characterized by having a large part of their workforce working part-time. 3.7 million employees – not being self-employed – are together contributing to 2.3 million full-time equivalent workers (FTE).

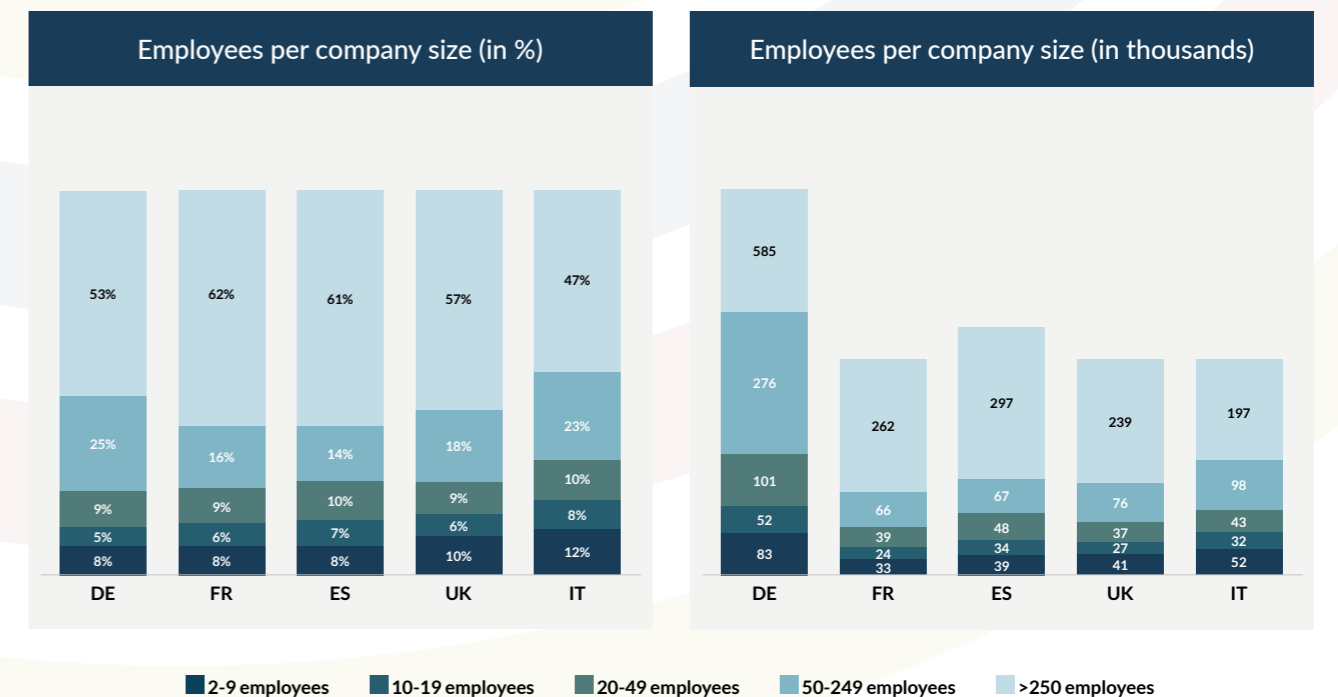
A low ratio indicates more people working part-time and/or working relatively shorter hours. However, large fluctuations are observed among the countries, with Sweden having a ratio of above 90% and Germany only 50%.



In France and Spain the largest share of employees work in large companies with more than 250 employees, whereas in Italy this is below 50%.

Medium-sized companies with 50 to 249 employees make up for about a quarter of the workforce in Italy and Germany.

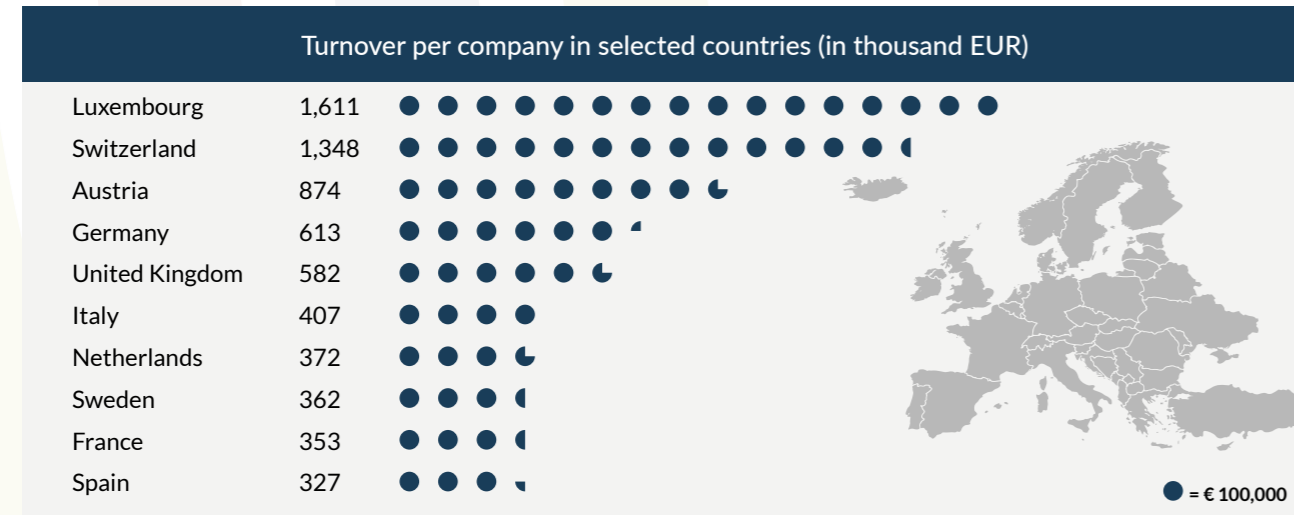
The share of employees working in small companies with less than 50 employees is quite constant in all five countries; only Italy has a slightly larger share with 30% of workers employed in this category.



Turnover per company and per employee

The turnover per company provides an indication of the degree of concentration in the industry. Starting at 387 thousand euro in 2013, the turnover per company reached 393 thousand euro in 2017.

Smaller countries such as Austria, Luxembourg and Switzerland concentrate their Cleaning Industry turnover amongst fewer companies resulting in a high turnover per company. In contrast, larger countries such as Spain, Italy and France, show lower figures ranging from 327 thousand to 407 thousand euro.

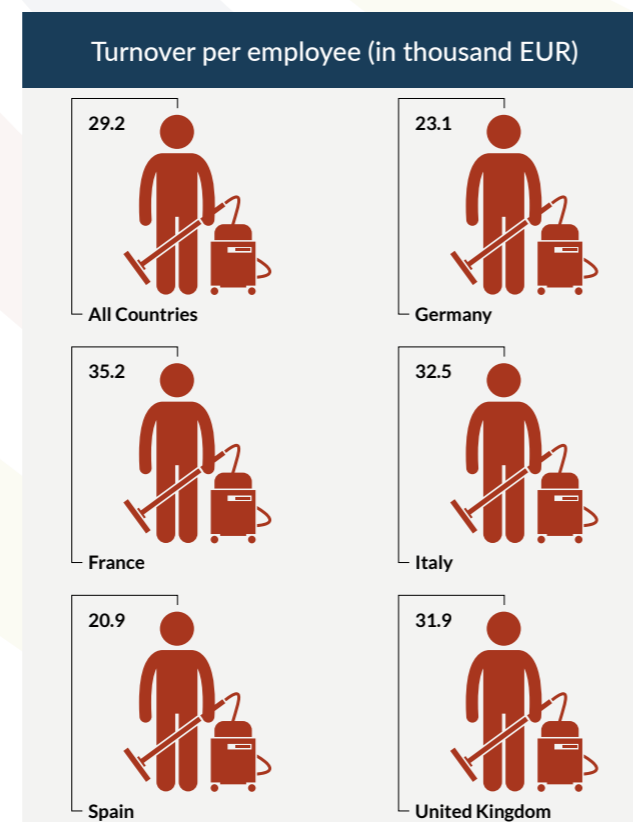
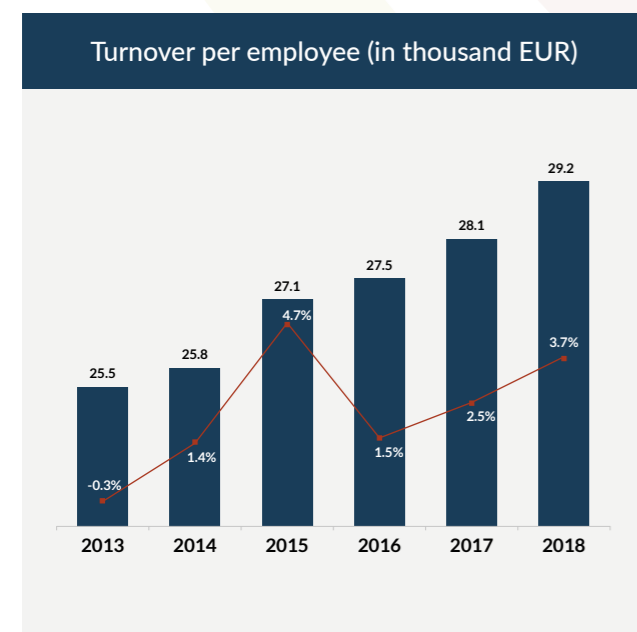


The average turnover per employee reached almost 30 thousand euro, corresponding to a productivity increase of almost 15% since 2013.

The turnover per employee exceeds 50 thousand euro in Switzerland, Denmark, Finland, Iceland, Norway and Sweden.

The lowest numbers are registered in Bulgaria and Portugal, where the turnover per employee is below 10 thousand euro.

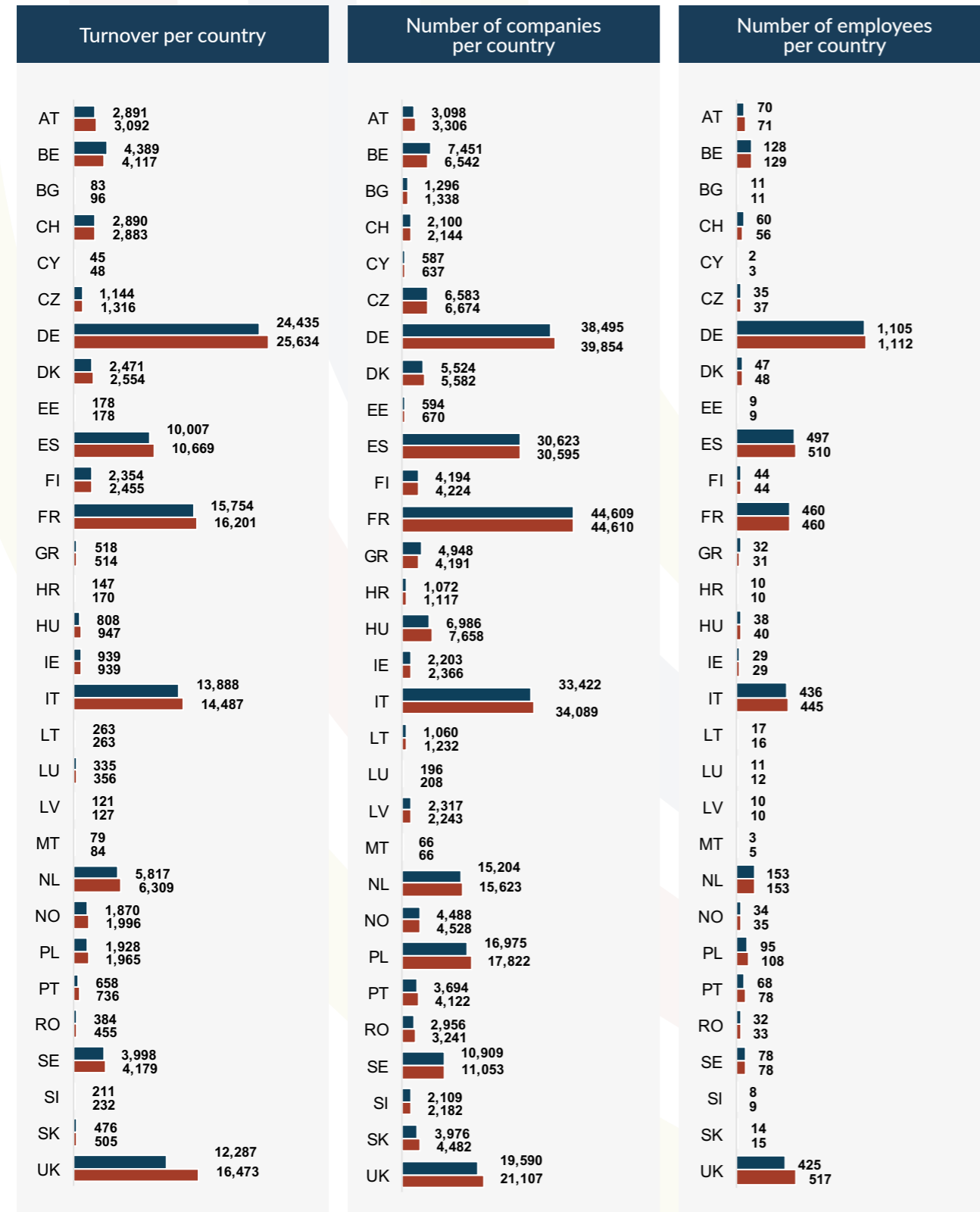
The productivity indicators in the United Kingdom, France and Italy lie above the European average of 30 thousand, showing that the companies there manage to generate more turnover per employee despite the competitive landscape.



Appendixes

Turnover, number of companies and number of employees per country

The below graphs contain detailed statistics per country for each of the variables from pages 8 to 10 of this report: Turnover, number of companies and number of employees.



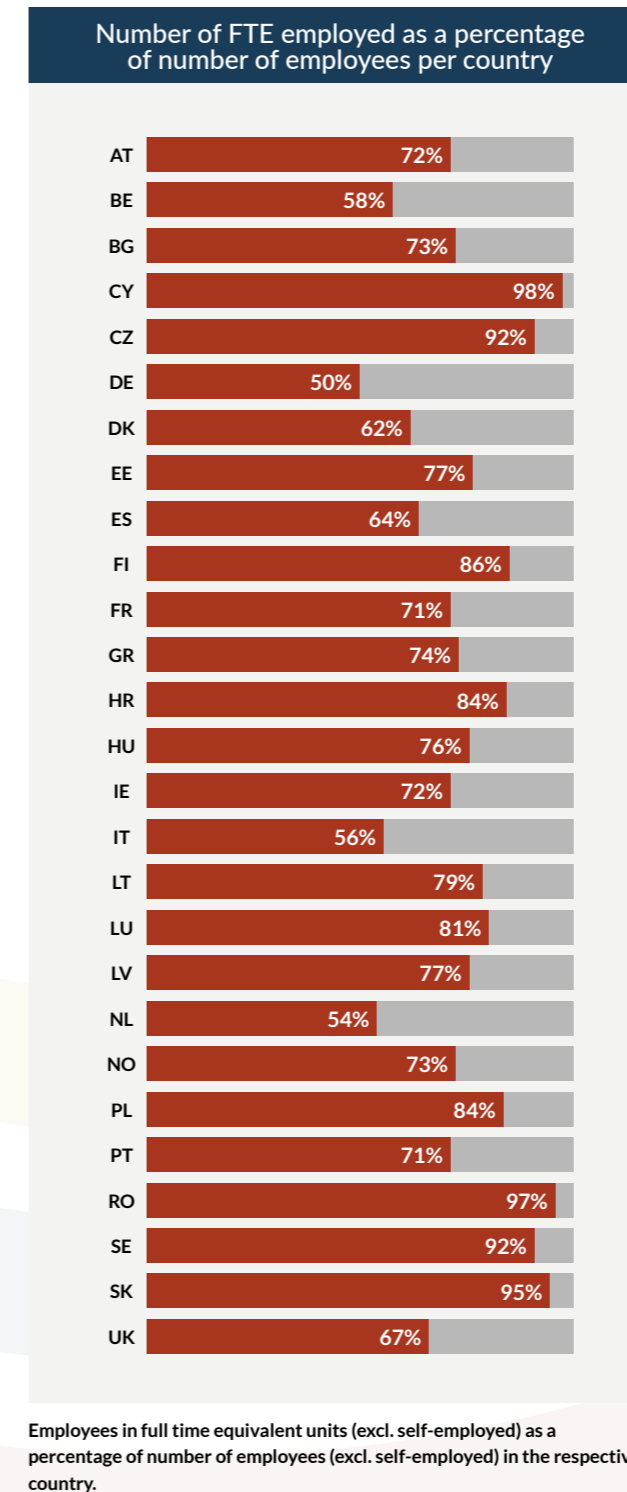
Turnover in current period, compared to the previous period in the respective country (in thousand EUR).

Number of companies in current period, compared to the the previous period in the respective country.

Number of people employed (incl. self-employed) in current period, compared to the previous period in the respective country (in thousands).

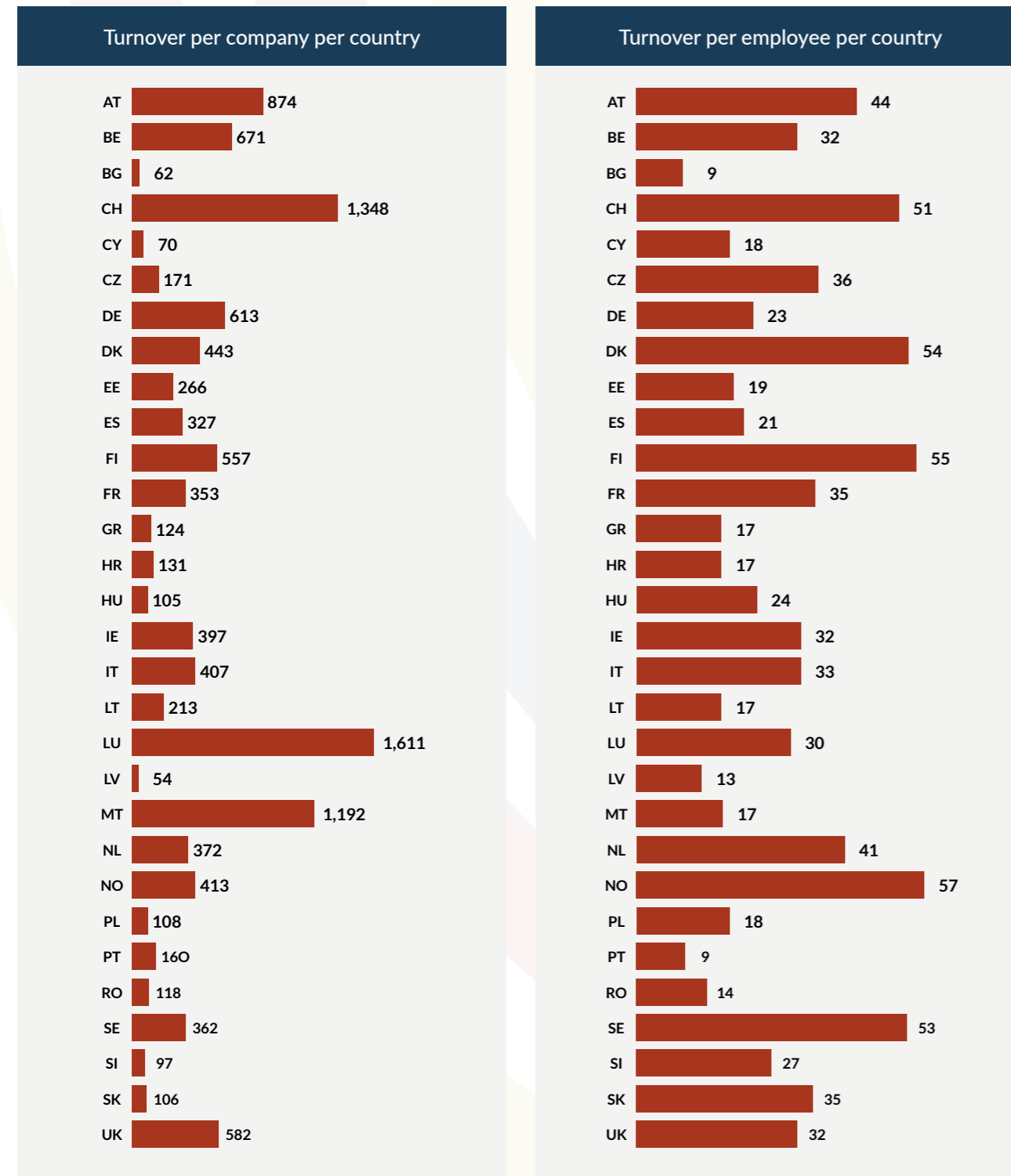
Number of FTE employed as a percentage of number of employees per country

The below graph contains detailed statistics per country for the variable from page 11 of this report: Number of FTE employed as a percentage of number of employees.



Turnover per company and per employee and country

The below graphs contain detailed statistics per country for the variables from page 12 of this report: Turnover per company and turnover per employee.



Total turnover divided by the total number of companies in the respective country (in thousand EUR).

Total turnover divided by the total number of people employed (incl. self-employed) in the respective country (in thousand EUR).



Who is the EFCI?

The EFCI is the voice of the European cleaning and facility services industry. The Federation is the recognized employer's organization and European Social Partner at industrial sectoral level.



283.000
companies



4 million
people employed



120.000
billion turnover

EFCI's core objectives are:

- To communicate the industry's needs and priorities to the policy makers at European level and in the European Social Dialogue.
- To promote the industry and enhance the sector's competitiveness and image.
- To foster the exchange of information among EFCI's members and to facilitate capacity building.
- To organize and implement actions and projects at European level.



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