

# **ASEAN Cleaning Services Market By Service Type (Commercial Cleaning {Window Cleaning, Vacuuming, Floorcare, Others}, Residential Cleaning {Maid Services, Carpet & Upholstery, Appliances, Other}), By Cleaning Type (General Cleaning, Weekly Cleaning, Deep Cleaning), By End User (Commercial, Residential, Industrial), By Country, Competition, Forecast and Opportunities, 2020-2030F**

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## **Abstracts**

The ASEAN Cleaning Services Market was valued at USD 4.28 Billion in 2024 and is expected to reach USD 6.64 Billion by 2030 with a CAGR of 7.44% during the forecast period. The ASEAN cleaning services market has witnessed significant growth over the past few years, driven by urbanization, industrialization, and the increasing demand for hygiene and cleanliness across various sectors. The market encompasses a wide range of services, including residential cleaning, commercial cleaning, industrial cleaning, and specialized cleaning services such as floor care, carpet cleaning, and window washing. With a rising middle class and expanding real estate sector, demand for both residential and commercial cleaning services continues to grow, making it a highly lucrative industry.

The rise in disposable income and the growing emphasis on health and sanitation have increased the need for professional cleaning services. Both residential and commercial establishments, including offices, healthcare facilities, educational institutions, and retail spaces, are now prioritizing cleanliness and hygiene, making cleaning services an essential part of daily operations. This demand has been further amplified by the ongoing concerns regarding the COVID-19 pandemic, which has heightened awareness

of the importance of maintaining a clean and sanitary environment. Urbanization in Southeast Asia is growing at an average annual rate of 2.2%, leading to higher demand for cleaning services in commercial, residential, and industrial sectors.

In terms of market segmentation, the commercial cleaning sector holds a substantial share, driven by the booming commercial real estate market in ASEAN countries. The growing number of office spaces, retail outlets, and commercial complexes contributes to the demand for cleaning services. Additionally, industrial cleaning services are also seeing a rise, especially in manufacturing, automotive, and construction industries, where maintaining cleanliness is crucial for worker safety and operational efficiency.

Technological advancements in cleaning equipment, including automated cleaning systems and eco-friendly products, have also contributed to the market's expansion. As sustainability becomes a key concern, there is a growing demand for green cleaning solutions that reduce the environmental impact. Furthermore, the increasing use of online platforms to book cleaning services has made it easier for consumers to access professional services, expanding the customer base for cleaning companies.

## Key Market Drivers

### Rising Urbanization and Population Growth

The increasing urbanization across ASEAN countries is one of the key drivers for the cleaning services market. With urban populations swelling, there is a higher demand for residential, commercial, and industrial cleaning services to maintain public spaces and private properties. The growth in urban centers such as Jakarta, Manila, and Bangkok has increased the need for professional cleaning services in both homes and businesses. Additionally, ASEAN's population growth rate has consistently been above the global average, further contributing to the demand for these services. As cities continue to grow, there will be an increase in new buildings, office spaces, and residential complexes, all of which require cleaning services. For instance, in Singapore, the population density is high, and many commercial buildings are being constructed, necessitating constant upkeep and cleanliness. The urban population in ASEAN countries is projected to increase by over 100 million people from 2020 to 2030, boosting demand for cleaning services in urban areas.

### Increased Focus on Hygiene and Sanitation

Health concerns, particularly in the wake of the COVID-19 pandemic, have heightened

the awareness around cleanliness and hygiene. Across ASEAN countries, there is a growing emphasis on maintaining sanitary conditions in public and private spaces. Governments have also implemented regulations for cleanliness, especially in high-traffic areas such as malls, offices, and hospitals. For example, Malaysia introduced stricter cleaning standards for restaurants, retail establishments, and public transportation to curb the spread of diseases. This shift toward heightened hygiene has spurred demand for cleaning services, both in terms of frequency and the use of professional-grade equipment. Hygiene concerns are pushing both businesses and households to prioritize cleaning, further driving the market's growth.

### Growing Commercial Real Estate Sector

The booming commercial real estate sector is a significant driver for cleaning services in ASEAN. With more businesses setting up offices and retail outlets, cleaning services are becoming a necessity to ensure these spaces remain in top condition. Countries like Thailand, Indonesia, and Vietnam have seen a surge in office space demand, leading to the need for more cleaning services. The retail industry in cities such as Jakarta and Manila has also expanded, resulting in a higher demand for cleaning services to maintain store environments. Additionally, shopping malls, which are key parts of the ASEAN retail landscape, require constant upkeep to ensure they remain attractive to customers. As the commercial real estate market continues to grow, so does the need for reliable and professional cleaning services. ASEAN's hospitality industry, worth over USD 100 billion in 2023, contributes significantly to the need for cleaning services as hotels and resorts require regular maintenance and hygiene solutions.

### Technological Advancements in Cleaning Equipment

Technological innovations have revolutionized the cleaning services market in ASEAN. Automated cleaning solutions, such as robotic vacuum cleaners and floor scrubbers, are making cleaning more efficient and cost-effective. These innovations allow businesses to cut labor costs while improving service delivery. Additionally, the rise of eco-friendly cleaning products has become a major trend, with many customers preferring green solutions that are safer for both the environment and the people using them. In Thailand and the Philippines, many cleaning companies have adopted these advanced technologies to improve service quality and reduce operational costs. The market for smart cleaning solutions is expected to grow as more companies adopt these innovations to stay competitive.

### Increasing Disposable Income and Living Standards

As the economy in ASEAN countries continues to grow, there is an increase in disposable income and living standards, particularly in cities like Singapore and Kuala Lumpur. This rise in affluence has led to higher demand for professional cleaning services, especially in residential areas. Wealthier households are now outsourcing cleaning tasks to free up time for other activities and enjoy a more convenient lifestyle. In addition, businesses in urban areas are also increasingly willing to invest in professional cleaning services to maintain a clean and presentable image. For example, in cities like Ho Chi Minh City, the middle class has expanded rapidly, driving demand for cleaning services as people seek convenience and higher-quality service. This trend contributes to the overall market growth as consumers have more resources to spend on cleaning services.

## Key Market Challenges

### Labor Shortages and Workforce Management

One of the major challenges in the ASEAN cleaning services market is the reliance on a large workforce for cleaning operations. Many cleaning companies face difficulties in recruiting and retaining skilled workers due to low wages, long working hours, and a high turnover rate. The cleaning industry often relies on manual labor, which makes it difficult to manage a consistent and reliable workforce. In addition, many cleaning tasks require workers to perform physically demanding tasks in potentially hazardous environments. These challenges can impact the overall efficiency of cleaning services, leading to increased operational costs and reduced service quality. Companies must continuously focus on worker retention, training, and ensuring the well-being of their employees to maintain a high level of service while addressing labor shortages.

### Rising Competition and Price Sensitivity

The ASEAN cleaning services market is highly fragmented, with numerous small, local, and international players competing for market share. This has led to intense price competition, making it challenging for companies to differentiate themselves based on service quality alone. Many customers, particularly in the residential sector, are highly price-sensitive and often opt for the cheapest options, which can erode profitability for cleaning service providers. To stay competitive, cleaning companies need to balance offering competitive pricing with delivering high-quality services and maintaining operational efficiency. This price competition, combined with limited customer loyalty, presents a continuous challenge for cleaning businesses in the region.

## Regulatory Compliance and Health Standards

The ASEAN region has a diverse regulatory environment, with each country having its own set of regulations related to cleaning, health, and safety standards. Cleaning companies need to stay updated on these regulations, which can vary across industries, such as hospitality, healthcare, and industrial cleaning. For example, the COVID-19 pandemic has led to heightened cleaning and hygiene standards, especially in healthcare and hospitality industries. Compliance with these changing health and safety regulations can be complex and costly, especially for small and medium-sized cleaning businesses that may lack resources to stay compliant. Non-compliance with regulatory standards can result in legal consequences, fines, and reputational damage.

## Environmental Sustainability Demands

With increasing awareness around environmental issues, there is rising demand for green and sustainable cleaning services. This includes using eco-friendly cleaning products, reducing water usage, and adopting energy-efficient cleaning equipment. While these initiatives are positive for the environment, they often come with higher operational costs. For cleaning service providers in ASEAN, adopting sustainable practices can be an expensive and challenging transition. Many cleaning companies still rely on conventional, chemical-based cleaning products, which are more affordable but have a negative environmental impact. Balancing sustainability with cost efficiency is a significant challenge for businesses looking to cater to an environmentally-conscious customer base without increasing their operational expenses.

## Technological Integration and Innovation

As the cleaning industry evolves, the demand for advanced cleaning technology has been increasing. Automated cleaning equipment, smart sensors, and digital platforms for booking services are becoming more common in the market. However, integrating such technology can be a challenge for many cleaning service providers, especially smaller companies with limited capital and resources. The upfront costs of purchasing and maintaining high-tech equipment can be a barrier to entry for some businesses. Furthermore, the need for skilled personnel to operate these advanced tools and equipment presents another hurdle. Companies must invest in employee training, technology infrastructure, and research and development to stay competitive. Adopting and scaling such innovations is essential for future growth but can be a significant challenge for businesses operating in the ASEAN cleaning services market.

## Key Market Trends

### Growing Popularity of Outsourced Cleaning Services

The trend of outsourcing cleaning services is becoming increasingly prevalent in the ASEAN market, particularly in the commercial and industrial sectors. Companies are increasingly outsourcing their cleaning needs to professional service providers rather than maintaining in-house cleaning teams. This trend is driven by cost savings, efficiency, and the desire to focus on core business operations. Outsourcing allows businesses to benefit from specialized cleaning expertise without the burden of managing cleaning staff, equipment, or supplies. For example, offices, hospitals, retail establishments, and educational institutions prefer to contract external cleaning firms to ensure their premises remain clean and hygienic without the added overhead of maintaining a full-time cleaning staff. Furthermore, outsourcing allows businesses to scale their cleaning services according to demand, avoiding the need for long-term commitments or investments in cleaning infrastructure. This trend is also evident in residential sectors, with cleaning companies offering subscription-based models and on-demand services, which are particularly appealing to busy urban dwellers. The flexibility, convenience, and cost-effectiveness of outsourced cleaning services have made it a popular option in the ASEAN region, with many businesses turning to cleaning companies that specialize in commercial and industrial cleaning to meet their hygiene needs.

### Expansion of Commercial and Industrial Cleaning

The growth of the commercial and industrial sectors in ASEAN countries is driving demand for specialized cleaning services. The expansion of the commercial real estate market, particularly office buildings, malls, and retail outlets, is boosting the need for cleaning services that cater to large-scale and complex spaces. Additionally, the rise in manufacturing and industrial activities, particularly in sectors like automotive, construction, and chemicals, is pushing the demand for industrial cleaning services. These services often require specialized equipment, chemicals, and expertise to maintain cleanliness while ensuring the safety and efficiency of operations. Industrial facilities, including factories and warehouses, require deep cleaning to prevent contamination, ensure health and safety standards, and reduce maintenance costs. As ASEAN countries continue to industrialize and expand their commercial infrastructure, there is an increasing need for professional cleaning services that can meet the specific requirements of these sectors. Companies are also investing in state-of-the-art cleaning

equipment and technology to provide a higher standard of service and address the unique challenges associated with large-scale and industrial cleaning. The growth of commercial and industrial sectors in ASEAN countries will continue to be a key driver for the expansion of professional cleaning services, presenting opportunities for cleaning companies to tap into these lucrative markets.

### Rise of On-Demand and Subscription-Based Cleaning Services

The rise of on-demand and subscription-based models is a key trend shaping the ASEAN cleaning services market. These business models have gained popularity, particularly among residential customers and small businesses, due to the convenience they offer. With the increasing use of smartphones and mobile apps, consumers can now book cleaning services with just a few clicks, scheduling a visit at their convenience without the need for long-term contracts. This model is appealing to busy urbanites who prefer flexible cleaning services that fit their schedule. On-demand cleaning services are particularly popular in metropolitan areas where customers demand quick and reliable services. Additionally, subscription-based cleaning services, where customers can sign up for regular, scheduled cleanings, are also on the rise. These services provide customers with peace of mind, knowing that their cleaning needs are taken care of without the hassle of booking each time. From residential homes to offices, subscription-based services offer a steady stream of revenue for cleaning companies and build long-term relationships with customers. The rise of these models is partly driven by the increasing demand for convenience, flexibility, and customization in consumer services. As the digital economy continues to grow in the ASEAN region, the on-demand and subscription cleaning service model is expected to become even more prevalent, creating opportunities for cleaning companies to cater to a tech-savvy, convenience-oriented customer base.

### Segmental Insights

#### Service Type Insights

Residential Cleaning segment dominated in the ASEAN Cleaning Services market in 2024, due to a combination of shifting consumer behavior, urbanization, and the growing demand for convenience in daily life. As urban populations increase across the region, particularly in countries like Singapore, Indonesia, and Thailand, there is a rising need for professional cleaning services to maintain the cleanliness of homes. With busy work schedules, long commutes, and growing lifestyles in densely populated cities, homeowners and renters are increasingly seeking external help to maintain their living

spaces.

Furthermore, as disposable incomes rise and more dual-income households emerge, the demand for residential cleaning services continues to grow. People are now more willing to outsource domestic chores, valuing time-saving services that allow them to focus on work, leisure, or family. This convenience-driven demand has led to a surge in on-demand cleaning services, where customers can easily schedule cleaning appointments via mobile apps or online platforms. These services often offer flexible pricing and subscription models that cater to the diverse needs of residential clients.

In addition, the increased awareness of hygiene and cleanliness, especially in the wake of the COVID-19 pandemic, has driven consumers to place greater emphasis on maintaining clean and sanitized living environments. As health and wellness have become top priorities, professional cleaning services are seen as an effective way to ensure a safe, hygienic, and comfortable home.

The proliferation of tech-driven solutions, such as apps and smart home devices, has also made residential cleaning more accessible and convenient for consumers. This trend is further amplified by the rapid growth of e-commerce platforms, making it easier for customers to book and manage services. These factors combined ensure that the residential cleaning segment will continue to dominate the ASEAN Cleaning Services market in 2024.

## Country Insights

Indonesia dominated the ASEAN Cleaning Services market in 2024, due to a combination of factors that contribute to its rapid economic growth, increasing urbanization, and growing demand for cleaning services across various sectors. The country's large population, expanding infrastructure, and rising middle class have created a robust demand for cleaning services, making Indonesia a key player in the regional market. Indonesia's rapid urbanization plays a critical role in driving the demand for cleaning services. With a growing number of urban centers and the expansion of residential and commercial spaces, there is an increasing need for professional cleaning services. The development of large residential complexes, office buildings, shopping malls, and industrial zones has resulted in a significant market for commercial and residential cleaning services, thus fueling the growth of the cleaning services sector.

Indonesia's economic development has led to increased investments in infrastructure,

including the construction of new commercial real estate, hotels, and other service-oriented establishments. This growth in the commercial real estate sector has contributed to the rise in demand for cleaning services to maintain these spaces in top condition. Furthermore, the hospitality sector, a key contributor to Indonesia's economy, has witnessed significant growth, leading to a higher demand for cleaning services, especially in hotels, resorts, and restaurants.

The growing awareness of hygiene and cleanliness, especially in the wake of the COVID-19 pandemic, has increased the need for cleaning services in both commercial and residential settings. The heightened focus on sanitation has led businesses and individuals to invest more in professional cleaning services for disinfection and sterilization, boosting the overall market. Indonesia's government policies aimed at promoting hygiene standards and improving public health have further contributed to the market's expansion.

#### Key Market Players

P. Dussmann Vietnam Co., Ltd.

AEON Delight Co., Ltd.

ATALIAN Group

PT Hygienis Environmental Services

Builwork Vietnam

DomesticONE

ISS A/S

KMAC International Pte Ltd.

Hiremop Pte Ltd

PT. Karya Trustindo Utama

#### Report Scope:

*ASEAN Cleaning Services Market By Service Type (Commercial Cleaning {Window Cleaning, Vacuuming, Floorcare, Ot...*

In this report, the ASEAN Cleaning Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

ASEAN Cleaning Services Market, By Service Type:

Commercial Cleaning

Window Cleaning

Vacuuming

Floorcare

Others

Residential Cleaning

Maid Services

Carpet & Upholstery

Appliances

Other

ASEAN Cleaning Services Market, By Cleaning Type:

General Cleaning

Weekly Cleaning

Deep Cleaning

ASEAN Cleaning Services Market, By End User:

Commercial

Residential

Industrial

ASEAN Cleaning Services Market, By Country:

Indonesia

Thailand

Vietnam

Malaysia

Singapore

Philippines

Myanmar

Cambodia

Laos

Brunei

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the ASEAN Cleaning Services Market.

Available Customizations:

ASEAN Cleaning Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

*ASEAN Cleaning Services Market By Service Type (Commercial Cleaning {Window Cleaning, Vacuuming, Floorcare, Ot...*

Detailed analysis and profiling of additional market players (up to five).

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