

# **Cleaning Services Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Window Cleaning, Vacuuming, Floor Care, Maid Services, Carpet & Upholstery, and Other), By End User (Commercial, Residential, Industrial), By Region, By Competition, 2018-2028**

<https://marketpublishers.com/r/C1C3485254E6EN.html>

Date: November 2023

Pages: 183

Price: US\$ 4,900.00 (Single User License)

ID: C1C3485254E6EN

## **Abstracts**

Global Cleaning Services Market was valued at USD 60.10 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.19% through 2028.

The Cleaning Services market refers to the sector within the broader service industry that specializes in providing professional cleaning and sanitation solutions for residential, commercial, and industrial spaces. This market encompasses a diverse range of services, including routine cleaning, deep cleaning, disinfection, and maintenance of various environments. Cleaning service providers cater to the growing demand for hygienic and well-maintained spaces, offering their expertise to individuals, businesses, and institutions.

Key components of the Cleaning Services market include residential cleaning for homes and apartments, commercial cleaning for offices, retail establishments, and hospitality venues, as well as industrial cleaning for manufacturing facilities and warehouses. The market is influenced by factors such as increasing awareness of health and hygiene, urbanization trends, and stringent regulatory standards. Cleaning service providers utilize a variety of cleaning agents, equipment, and technologies to deliver effective and tailored solutions to their clients. As cleanliness and sanitation continue to be paramount considerations in various sectors, the Cleaning Services market plays a

pivotal role in promoting a healthy and safe living and working environment.

## Key Market Drivers

### Increasing Awareness of Health and Hygiene:

The global Cleaning Services market is being driven by a growing awareness of health and hygiene among individuals and businesses. The COVID-19 pandemic has underscored the importance of maintaining clean and sanitized environments to prevent the spread of infectious diseases. As a result, there has been a heightened focus on regular cleaning and disinfection practices in both residential and commercial spaces. Consumers are increasingly recognizing the significance of professional cleaning services in maintaining a healthy living and working environment.

Businesses, in particular, are investing more in professional cleaning services to create a safe and hygienic atmosphere for employees and customers. The emphasis on health and hygiene is expected to sustain the demand for Cleaning Services globally, as individuals and organizations prioritize cleanliness as an essential component of overall well-being.

### Urbanization and Population Growth:

Rapid urbanization and population growth are significant drivers of the global Cleaning Services market. As more people migrate to urban areas, there is a corresponding increase in the demand for cleaning services, both in residential and commercial spaces. Urban dwellers often lead busy lives, leaving them with limited time for household chores. This trend has led to a rise in the outsourcing of cleaning tasks, driving the demand for professional cleaning services.

Moreover, the expansion of commercial spaces such as offices, shopping malls, and hospitality establishments in urban areas further contributes to the growth of the Cleaning Services market. These businesses require regular and specialized cleaning to meet the expectations of a discerning customer base, creating opportunities for cleaning service providers to cater to the needs of a rapidly urbanizing world.

### Environmental Sustainability and Green Cleaning Practices:

A growing emphasis on environmental sustainability is influencing the Cleaning Services market. Consumers are increasingly conscious of the environmental impact of

cleaning products and practices. This has led to a rise in the adoption of green cleaning solutions, which are environmentally friendly and use eco-friendly cleaning agents. Cleaning service providers are aligning their offerings with these preferences, incorporating sustainable practices and products into their service portfolios.

The demand for green cleaning services is driven by a combination of consumer awareness and regulatory initiatives promoting environmentally friendly practices. As sustainability becomes a key consideration for both residential and commercial clients, the Cleaning Services market is evolving to meet these expectations, creating new opportunities for companies that prioritize eco-friendly cleaning solutions.

#### Technological Advancements in Cleaning Equipment:

Technological advancements in cleaning equipment are driving innovation and efficiency in the Cleaning Services market. The introduction of state-of-the-art cleaning technologies, such as robotic cleaners, smart cleaning systems, and advanced cleaning agents, is revolutionizing the industry. These technologies enhance the speed and effectiveness of cleaning processes, reducing the time required to complete tasks while maintaining high standards of cleanliness.

The integration of Internet of Things (IoT) technologies allows for real-time monitoring and management of cleaning operations. This not only improves efficiency but also enables a more proactive and data-driven approach to cleaning services. As businesses seek to optimize their operations and deliver higher quality services, the adoption of advanced cleaning technologies becomes a crucial competitive advantage in the Cleaning Services market.

#### Increased Outsourcing of Non-core Activities:

A key driver for the Cleaning Services market is the growing trend of outsourcing non-core activities by businesses. Companies across various industries are focusing on their core competencies and outsourcing peripheral functions, including cleaning services. Outsourcing cleaning tasks allows businesses to concentrate on their primary operations, leading to increased efficiency and cost savings.

The outsourcing trend is not limited to the commercial sector; it extends to residential spaces as well. Busy lifestyles and dual-income households are prompting individuals to seek professional cleaning services to manage their household chores. This shift towards outsourcing non-core activities is expected to fuel the demand for Cleaning

Services globally, as businesses and individuals recognize the benefits of relying on specialized service providers for cleaning needs.

#### Stringent Regulatory Standards and Compliance:

Stringent regulatory standards and compliance requirements in various industries are propelling the growth of the Cleaning Services market. Health and safety regulations, particularly in sectors such as healthcare, hospitality, and food services, mandate high levels of cleanliness and sanitation. Compliance with these standards necessitates the expertise of professional cleaning services to ensure that facilities meet the specified hygiene requirements.

The enforcement of stricter regulations, coupled with a growing awareness of the legal implications of non-compliance, is driving businesses to invest in professional cleaning services. Cleaning service providers, in turn, must stay abreast of evolving regulations and adapt their practices to meet or exceed compliance standards. This symbiotic relationship between regulatory requirements and the Cleaning Services market creates a dynamic environment where adherence to standards becomes a crucial factor in the success and sustainability of cleaning service businesses.

#### Government Policies are Likely to Propel the Market

##### Health and Safety Regulations in Commercial Cleaning Services:

Government policies play a crucial role in shaping the global Cleaning Services market, with health and safety regulations being at the forefront. These regulations are designed to ensure that cleaning services, especially in commercial settings, adhere to specific standards that prioritize the well-being of employees and the public. Governments worldwide recognize the role of clean and hygienic environments in preventing the spread of diseases, and as a result, they have implemented comprehensive regulations to govern the cleaning services sector.

Health and safety policies often mandate the use of approved cleaning agents, proper training for cleaning staff, and the implementation of protocols that minimize the risk of accidents and exposure to hazardous substances. In some regions, there are also guidelines for the frequency and thoroughness of cleaning in different types of commercial establishments. Compliance with these regulations is not only a legal requirement but also a crucial factor in securing contracts with businesses, as clients increasingly prioritize service providers who demonstrate a commitment to maintaining

a safe and healthy environment.

#### Environmental Sustainability Standards for Cleaning Products:

Government policies around the globe are increasingly focused on promoting environmental sustainability, and this extends to the Cleaning Services market. Regulations related to the use of cleaning products emphasize the importance of eco-friendly and sustainable solutions. Governments are setting standards for the composition of cleaning agents, encouraging the use of biodegradable ingredients, and discouraging the use of harmful chemicals that can have adverse effects on the environment.

These policies often involve certification processes, where cleaning products must meet specific environmental criteria to be deemed compliant. Cleaning service providers need to align their practices with these regulations, not only to meet legal requirements but also to meet the rising demand from environmentally conscious consumers and businesses. Adherence to environmental sustainability standards is becoming a differentiating factor in the competitive landscape of the Cleaning Services market, driving innovation and the adoption of green cleaning practices.

#### Employment and Labor Laws in the Cleaning Services Sector:

Government policies pertaining to employment and labor laws have a significant impact on the global Cleaning Services market. These regulations cover various aspects, including wages, working hours, occupational safety, and employee rights. In many regions, cleaning service providers are required to comply with minimum wage laws and provide appropriate training and safety measures for their staff.

Additionally, there may be specific regulations addressing the use of part-time or contract workers in the cleaning industry. Governments aim to ensure fair labor practices and protect the rights of cleaning staff, considering the labor-intensive nature of the cleaning services sector. Compliance with these employment and labor laws is essential for cleaning service providers to build a positive reputation, attract skilled workers, and maintain sustainable business operations.

#### Certification and Licensing for Cleaning Service Providers:

Government policies often mandate certification and licensing requirements for cleaning service providers to operate in the market. These regulations are designed to ensure a

certain level of competency, professionalism, and adherence to industry standards. Cleaning companies may be required to obtain specific certifications related to hygiene, safety, or environmental practices, demonstrating their commitment to quality service delivery.

Licensing requirements may vary from region to region, but they typically involve a thorough assessment of a company's practices, staff training, and compliance with health and safety standards. Adhering to certification and licensing requirements not only helps cleaning service providers establish credibility but also provides assurance to clients that they are entrusting their cleaning needs to a reputable and qualified service provider.

#### Tax Incentives for Green Cleaning Practices:

Governments worldwide are increasingly recognizing the importance of incentivizing environmentally friendly practices, and this extends to the Cleaning Services market. Some regions offer tax incentives, rebates, or subsidies for cleaning service providers that adopt green cleaning practices. These incentives aim to encourage the use of eco-friendly cleaning agents, energy-efficient equipment, and sustainable waste management practices.

By providing financial benefits to companies that prioritize environmental sustainability, governments contribute to the overall shift towards greener business practices. Cleaning service providers can take advantage of these incentives not only to reduce their environmental impact but also to enhance their financial viability and appeal to clients who prioritize socially responsible and sustainable service providers.

#### Public Procurement Policies Supporting Local Cleaning Businesses:

Government policies related to public procurement can significantly impact the Cleaning Services market, especially for small and local businesses. Some governments implement policies that prioritize local and small businesses when awarding cleaning service contracts for public facilities. These policies aim to support local economies, create job opportunities, and promote fair competition within the cleaning services sector.

For cleaning service providers, understanding and navigating public procurement policies is essential for accessing opportunities in the public sector. Compliance with local procurement regulations, along with a focus on quality and cost competitiveness,



can position cleaning businesses to secure contracts with government agencies and institutions, contributing to the growth and sustainability of the Cleaning Services market at the regional level.

## Key Market Challenges

### Labor Shortages and Workforce Challenges:

The global Cleaning Services market faces a significant challenge in the form of labor shortages and workforce-related issues. The cleaning industry relies heavily on a sizable and skilled workforce to meet the demands of residential, commercial, and industrial clients. However, finding and retaining qualified cleaning staff has become an ongoing challenge for companies operating in this sector.

One of the primary reasons for labor shortages in the Cleaning Services market is the perception of cleaning jobs as low-skilled and physically demanding, leading to difficulties in attracting and retaining talent. Many individuals may view cleaning roles as temporary or transitional employment, resulting in high turnover rates within the industry. This constant churn in the workforce poses challenges for companies in maintaining consistent service quality and building lasting client relationships.

Moreover, the COVID-19 pandemic has exacerbated labor shortages, with concerns about health and safety prompting some individuals to seek alternative employment or stay out of the workforce altogether. The demand for cleaning services surged during the pandemic, driven by increased awareness of hygiene, leading to additional strain on an already stretched workforce.

To address these challenges, companies in the Cleaning Services market must invest in strategies to attract and retain skilled workers. This may involve offering competitive wages, providing training and professional development opportunities, and implementing measures to enhance job satisfaction and employee well-being. Additionally, exploring technological solutions such as automation and robotics can help alleviate the impact of labor shortages on routine and repetitive cleaning tasks, allowing human workers to focus on more complex and specialized activities.

### Price Competition and Margins Pressure:

Another significant challenge confronting the global Cleaning Services market is the intense price competition and the resulting pressure on profit margins. The industry is

characterized by a large number of service providers, ranging from small local businesses to large multinational corporations. This abundance of competitors often leads to a price-driven market dynamic where clients, especially in the commercial sector, seek the lowest-cost cleaning solutions.

As a consequence of this price competition, cleaning service providers may find themselves facing challenges in maintaining healthy profit margins. While lowering prices can be a short-term strategy to win contracts, it can have long-term implications on the financial sustainability of companies within the Cleaning Services market. Reduced margins may limit investments in employee training, equipment upgrades, and the adoption of environmentally friendly practices, hindering the ability of companies to differentiate themselves and meet evolving customer expectations.

Furthermore, clients' focus on cost containment can sometimes lead to unrealistic expectations regarding the scope and quality of cleaning services. Cleaning companies may face pressure to deliver more for less, which can strain operational efficiency and compromise the overall effectiveness of their services.

To address the challenge of price competition and margin pressure, cleaning service providers must strategically differentiate themselves in the market. This may involve emphasizing quality, innovation, and value-added services to justify higher pricing. Developing strong relationships with clients based on trust and reliability can also be a key differentiator in a competitive market. Additionally, leveraging technology to enhance efficiency and reduce operating costs can contribute to maintaining competitive pricing while safeguarding profit margins.

In summary, the global Cleaning Services market must navigate the challenges of labor shortages and workforce issues, as well as the pressure from intense price competition. Addressing these challenges requires a strategic approach that includes workforce development, technological innovation, and differentiation strategies to ensure the long-term sustainability and success of cleaning service providers in this dynamic and competitive industry.

## Segmental Insights

### Type Insights

The Maid Services segment held the largest Market share in 2022. Maid services cater to a fundamental need for residential cleaning. As urbanization continues, and with an



increasing number of dual-income households, there is a growing demand for professional maid services to handle routine cleaning tasks. Consumers value the convenience and time savings that come with hiring maid services to maintain a clean and organized home.

Modern lifestyles are characterized by busy schedules, leaving individuals with limited time for household chores. Maid services offer a practical solution for individuals and families seeking to delegate cleaning responsibilities, allowing them to focus on work, family, and other priorities.

Maid services can be tailored to meet specific needs. Whether clients require regular weekly cleaning, deep cleaning on a monthly basis, or assistance with specific tasks, maid services offer a level of customization and flexibility that resonates with consumers. This adaptability contributes to the widespread appeal of these services.

Reputable maid services often employ trained and professional cleaning staff. Clients appreciate the expertise and efficiency that professionals bring to the task, ensuring a higher standard of cleanliness compared to traditional do-it-yourself methods.

Maid services typically involve individuals entering private spaces, creating a need for trust and reliability. Established maid service companies often conduct thorough background checks on their staff, providing clients with a sense of security. This trust factor is crucial in the decision-making process for those considering hiring cleaning services.

Maid services can offer comprehensive cleaning solutions, covering a range of tasks from dusting and vacuuming to kitchen and bathroom cleaning. This all-encompassing approach makes maid services a one-stop solution for households looking for thorough and efficient cleaning.

The expansion of the middle-class population globally contributes to the increased affordability of maid services. As more households enter the middle-income bracket, there is a greater ability to allocate budget for cleaning services, driving market growth.

There has been a shift in societal attitudes towards outsourcing domestic tasks. What was once considered a luxury is increasingly viewed as a practical service, leading to greater acceptance of maid services across various socioeconomic groups.

## End User Insights

The Commercial segment held the largest Market share in 2022. Commercial spaces, including offices, retail stores, malls, and corporate buildings, have a consistent need for cleaning services to maintain a professional and welcoming atmosphere. Businesses understand the importance of a clean and well-kept environment in creating a positive impression on clients, customers, and employees.

Commercial spaces are often subject to stringent regulatory standards regarding cleanliness and hygiene. Compliance with these standards is crucial for businesses, especially those in industries like healthcare, hospitality, and food services. Professional cleaning services help businesses meet and exceed these standards, ensuring a safe and healthy environment.

Commercial spaces are generally larger and more diverse than residential properties. This requires a comprehensive approach to cleaning, including tasks such as floor maintenance, window cleaning, and specialized cleaning for various surfaces. Commercial cleaning services are equipped to handle the scale and diversity of these tasks efficiently.

Businesses recognize the impact of cleanliness on their brand image and reputation. A clean and well-maintained commercial space reflects professionalism and attention to detail, influencing how clients, partners, and employees perceive the company. Maintaining a positive corporate image is a driving force behind the demand for commercial cleaning services.

The outsourcing of non-core functions, including cleaning services, is a prevalent trend in the business world. Companies prefer to focus on their core competencies while delegating cleaning responsibilities to specialized service providers. This outsourcing trend contributes to the dominance of commercial cleaning services.

Commercial spaces typically require more frequent cleaning compared to residential properties. Regular cleaning, often on a daily or weekly basis, is necessary to address high foot traffic, the use of shared spaces, and the need for continuous maintenance.

Commercial cleaning services often offer specialized solutions tailored to the needs of specific industries. For example, medical facilities require thorough disinfection, while retail spaces may need focused attention on maintaining visual appeal. The ability to provide industry-specific cleaning solutions enhances the attractiveness of commercial cleaning services.

As urbanization continues globally, the concentration of businesses in urban centers contributes to the sustained demand for commercial cleaning services. Urban areas are hubs for commercial activities, leading to a higher concentration of offices, retail outlets, and corporate spaces.

## Regional Insights

### North America:

In North America, the Cleaning Services market is characterized by a robust demand driven by stringent health and safety regulations, particularly in the United States and Canada. The region's awareness of green cleaning practices is high, leading to an increased adoption of environmentally friendly solutions. Urbanization and a thriving commercial sector contribute significantly to the demand for professional cleaning services.

### Europe:

European countries exhibit a mature Cleaning Services market, marked by a strong emphasis on sustainability and adherence to strict regulatory standards. The European market sees a rising preference for smart cleaning technologies and a notable integration of IoT solutions. The diverse business landscape, including bustling urban centers and historical sites, fuels demand for both commercial and heritage site cleaning services.

### Asia-Pacific:

The Cleaning Services market in Asia-Pacific experiences robust growth attributed to rapid urbanization, expanding commercial spaces, and heightened awareness of hygiene in countries like China, India, and Japan. Government initiatives promoting cleanliness contribute to market growth. The region also sees a surge in demand for specialized cleaning services in healthcare and hospitality sectors.

## Key Market Players

### ISS A/S

ABM Industries Incorporated

Aramark Corporation

Diversey Holdings Ltd

Rentokil Initial plc

Anaheim Cleaning Services

JanPro Cleaning & Staffing

ABM Facility Inc.

Sodexo Group

CBRE Group

Report Scope:

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

Cleaning Services Market, By Type:

Window Cleaning

Vacuuming

Floor Care,

Maid Services,

Carpet & Upholstery

Other

## Cleaning Services Market, By End User:

Commercial

Residential

Industrial

## Cleaning Services Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

## Competitive Landscape

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

## Available Customizations:

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

## Company Information

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



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  - 13.6.4. Key Personnel/Key Contact Person
  - 13.6.5. Key Product/Services Offered
- 13.7. JanPro Cleaning & Staffing
  - 13.7.1. Business Overview
  - 13.7.2. Key Revenue and Financials
  - 13.7.3. Recent Developments
  - 13.7.4. Key Personnel/Key Contact Person
  - 13.7.5. Key Product/Services Offered
- 13.8. ABM Facility Inc.

- 13.8.1. Business Overview
- 13.8.2. Key Revenue and Financials
- 13.8.3. Recent Developments
- 13.8.4. Key Personnel/Key Contact Person
- 13.8.5. Key Product/Services Offered
- 13.9. Sodexo Group
  - 13.9.1. Business Overview
  - 13.9.2. Key Revenue and Financials
  - 13.9.3. Recent Developments
  - 13.9.4. Key Personnel/Key Contact Person
  - 13.9.5. Key Product/Services Offered
- 13.10. CBRE Group
  - 13.10.1. Business Overview
  - 13.10.2. Key Revenue and Financials
  - 13.10.3. Recent Developments
  - 13.10.4. Key Personnel/Key Contact Person
  - 13.10.5. Key Product/Services Offered

## **14. STRATEGIC RECOMMENDATIONS**

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