

Janitorial Service Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Residential, Commercial), By End Use (Standard Cleaning, Damage Restoration Cleaning, Exterior Window Cleaning, Floor Care Services, Others), By Region & Competition, 2019-2029F

<https://marketpublishers.com/r/J4F1D382E119EN.html>

Date: September 2024

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: J4F1D382E119EN

Abstracts

Global Janitorial Service Market was valued at USD 292.7 Billion in 2023 and is anticipated to grow during the forecast period with a CAGR of 3.2% through 2029. The surge in demand for janitorial services is primarily propelled by the decline in office vacancy rates and the uptick in business activities. The increasing prevalence of airborne illnesses and growing concerns about employee health and hygiene are further driving the market's need for cleaning services. Given the labor-intensive nature of cleaning tasks, there is a preference for engaging experienced service providers, leading to heightened demand for janitorial services across both residential and commercial sectors. Clients in the market often opt to hire or outsource to service providers due to their cost-effectiveness and operational simplicity. Throughout the projected period, the demand is anticipated to be fueled by the growing emphasis on maintaining cleaner and more environmentally friendly workplace environments, with a notable uptick observed in the adoption of green cleaning practices.

The industry is predominantly steered by consumers' increasing awareness of workplace wellness and hygiene, leading to an expanding market driven by heightened awareness and the necessity for cleaner surroundings. Concerns regarding health issues stemming from unhygienic environments are fueling the desire for clean and healthy workplace environments, propelling demand for janitorial services in both commercial and residential sectors. Expert cleaning services offered by businesses

facilitate thorough cleaning of offices, restrooms, and other spaces, ensuring clients can enjoy tidy and inviting surroundings. Moreover, various industries, including corporate offices, schools, and institutional facilities, are outsourcing cleaning and maintenance services to uphold cleanliness standards, contributing to the widespread acceptance of janitorial services and fostering market growth. Furthermore, janitorial services often yield superior results compared to in-house staff, owing to their specialized expertise in cleaning methods and products. These services extend beyond mere cleaning to encompass routine maintenance of equipment, floors, and fixtures, offering cost-effective solutions that present lucrative opportunities for market expansion. However, the lack of direct control over services poses a challenge to market adoption. Since these services are outsourced to external firms, clients may experience a communication gap and limited control over service delivery and employee performance, hindering widespread adoption of janitorial services.

Key Market Drivers

Increasing Awareness of Health and Safety Standards

One of the primary drivers steering the Janitorial Service Market is the heightened awareness of health and safety standards. The ongoing global health crisis, marked by events such as the COVID-19 pandemic, has intensified the focus on cleanliness and hygiene. Businesses, institutions, and individuals are now more conscious than ever about the importance of maintaining a clean environment to prevent the spread of infections.

In response to this awareness, there has been a surge in demand for professional janitorial services equipped to handle the complexities of maintaining stringent health and safety standards. Cleaning companies have adapted by incorporating advanced cleaning technologies, using EPA-approved disinfectants, and implementing rigorous training programs for their staff to ensure compliance with the latest health guidelines.

Furthermore, regulatory bodies and government agencies have been actively promoting and enforcing health and safety measures, placing additional responsibility on businesses to maintain clean and sanitized premises. This has created a conducive environment for the growth of the Janitorial Service Market, as organizations seek reliable partners to navigate the intricate landscape of health and safety compliance.

The emphasis on health and safety is not limited to the pandemic response; it has become a fundamental aspect of corporate social responsibility. Businesses are

increasingly recognizing the role of a clean environment in fostering employee well-being, productivity, and satisfaction. Janitorial services, therefore, play a pivotal role in helping organizations align with these values and create a positive and healthy workplace culture.

Rising Demand for Specialized Cleaning Services

The evolving landscape of business operations and facility management has given rise to a growing demand for specialized cleaning services, thereby acting as a major driver for the Janitorial Service Market. Traditional janitorial services have expanded beyond routine cleaning tasks to include specialized services tailored to specific industries and environments.

For instance, industries such as healthcare, hospitality, and manufacturing have unique cleaning requirements that demand specialized expertise. In healthcare facilities, there is a need for stringent infection control measures, while hospitality establishments require meticulous attention to detail to create a welcoming atmosphere for guests. Manufacturers often face challenges related to industrial debris, equipment cleaning, and compliance with regulatory standards.

To meet these diverse needs, janitorial service providers are increasingly offering specialized cleaning solutions. This specialization involves not only the use of industry-specific cleaning protocols but also the deployment of specialized equipment and trained personnel. This trend not only enhances the overall effectiveness of cleaning processes but also ensures that businesses adhere to sector-specific regulations and standards.

The advent of green cleaning practices is another dimension of specialization that has gained traction in the Janitorial Service Market. With growing environmental consciousness, businesses are seeking janitorial services that employ eco-friendly cleaning products and sustainable practices. This has led to the development of specialized cleaning services that focus on minimizing environmental impact while delivering effective cleaning results.

The rising demand for specialized cleaning services reflects a broader shift in the janitorial industry towards customization and adaptability. As businesses recognize the need for tailored solutions, janitorial service providers are poised to capitalize on this trend by diversifying their service offerings and establishing expertise in niche markets.

Technological Advancements and Innovation

Technological advancements and innovation have emerged as major drivers shaping the Janitorial Service Market, revolutionizing the way cleaning services are delivered and managed. From robotic cleaners to sophisticated cleaning solutions, technology has played a pivotal role in enhancing efficiency, precision, and overall service quality within the janitorial industry.

One of the notable innovations in the janitorial sector is the integration of robotics and automation. Robotic cleaners equipped with artificial intelligence and sensor technologies are increasingly being employed for routine and specialized cleaning tasks. These machines can navigate complex spaces, identify areas that require attention, and perform repetitive tasks with consistency. The adoption of robotic cleaners not only improves the speed and efficiency of cleaning processes but also allows human janitorial staff to focus on more intricate and nuanced aspects of their work.

Furthermore, the use of data analytics and smart sensors has enabled janitorial service providers to implement data-driven cleaning strategies. These technologies gather real-time information about foot traffic, usage patterns, and cleanliness levels, allowing for dynamic and responsive cleaning schedules. Predictive maintenance systems also help identify potential issues with equipment before they escalate, reducing downtime and ensuring uninterrupted service delivery.

The integration of green cleaning technologies is another noteworthy aspect of innovation in the Janitorial Service Market. This involves the use of environmentally friendly cleaning products, energy-efficient equipment, and sustainable practices. As businesses and consumers increasingly prioritize sustainability, janitorial service providers leveraging green cleaning technologies are well-positioned to meet the demand for eco-conscious cleaning solutions.

Moreover, the adoption of mobile apps and cloud-based management systems has streamlined communication and operational processes in the janitorial industry. Clients can easily schedule services, track cleaning progress, and provide feedback through user-friendly interfaces. Janitorial staff, in turn, can access real-time information, receive task assignments, and report issues promptly, leading to enhanced transparency and efficiency in service delivery.

Key Market Challenges

Labor Shortages and High Turnover Rates

One of the major challenges confronting the Janitorial Service Market is the persistent issue of labor shortages and high turnover rates within the workforce. Cleaning staff turnover, often fueled by the perception of janitorial work as low-skill and low-wage, poses operational challenges for service providers. The constant need for recruitment, training, and onboarding diverts resources from enhancing service quality and innovation.

The turnover issue not only affects the stability of service provision but also impacts client satisfaction. Clients prefer consistency in the cleaning staff assigned to their premises, and frequent turnover disrupts this continuity. Moreover, the competition from other industries offering more attractive wages and benefits further exacerbates the challenge.

Addressing labor shortages requires a multifaceted approach. Janitorial service providers must invest in competitive compensation packages, comprehensive benefits, and opportunities for career advancement to attract and retain skilled professionals. Additionally, creating a positive work environment, emphasizing job satisfaction, and providing ongoing training can contribute to reducing turnover rates and maintaining a stable and motivated workforce.

Evolving Customer Expectations and Diverse Requirements

The Janitorial Service Market is continuously challenged by the evolving expectations of customers who demand more than traditional cleaning services. Customers now seek specialized solutions, innovative approaches, and a proactive response to their unique cleaning needs. This presents a challenge as janitorial service providers must stay ahead of these expectations and adapt their offerings accordingly.

The subjective nature of cleanliness adds complexity to this challenge. Different clients may have diverse perceptions of what constitutes a clean environment. Balancing the customization of services to meet individual client needs while maintaining a consistent standard of cleanliness is a delicate task.

To address these challenges, janitorial service providers must adopt a customer-centric approach. This involves regular communication, implementing feedback mechanisms, and committing to continuous improvement. Additionally, staying abreast of industry

trends and investing in advanced cleaning technologies and methodologies are essential to meeting evolving customer expectations.

Rising Costs of Supplies and Equipment

Janitorial service providers face the challenge of managing rising costs associated with cleaning supplies and equipment. The prices of cleaning products, machinery, and technology have been subject to fluctuations, impacting the operational expenses of service providers.

The increasing demand for eco-friendly and sustainable cleaning solutions, while positive for environmental reasons, adds another layer of complexity. Green cleaning products and equipment often come with higher price tags, placing financial strain on janitorial service providers seeking to align with environmentally conscious practices.

To mitigate the impact of rising costs, service providers must implement cost-effective procurement strategies. This may involve negotiating bulk purchase agreements with suppliers, exploring alternative, more affordable green cleaning options, and investing in energy-efficient equipment to reduce long-term operational expenses.

Key Market Trends

Adoption of Smart Cleaning Technologies

A prominent trend in the Janitorial Service Market is the increasing adoption of smart cleaning technologies. The integration of Internet of Things (IoT) devices, sensors, and artificial intelligence (AI) has transformed traditional cleaning processes, enhancing efficiency and effectiveness.

Smart cleaning technologies allow for real-time monitoring of cleanliness levels, utilization patterns, and equipment status. IoT-enabled devices can collect data on foot traffic, occupancy rates, and high-touch surfaces, enabling janitorial service providers to optimize cleaning schedules and allocate resources more effectively.

AI-driven solutions, including robotic cleaners, have gained popularity for routine and specialized cleaning tasks. These machines can navigate complex spaces, identify areas that require attention, and perform repetitive tasks with precision. The adoption of smart technologies not only improves the speed and quality of cleaning services but also contributes to sustainability efforts by optimizing resource usage.

To stay competitive, janitorial service providers are increasingly investing in training their workforce to operate and manage smart cleaning technologies. Additionally, they are collaborating with technology vendors to integrate these solutions into their service offerings, providing clients with advanced, data-driven cleaning options.

Focus on Sustainable and Eco-Friendly Practices

The growing emphasis on sustainability and environmental responsibility is a significant trend in the Janitorial Service Market. Clients are increasingly seeking janitorial service providers that prioritize eco-friendly cleaning practices, reflecting a broader societal shift toward green initiatives.

To align with this trend, janitorial service providers are adopting sustainable cleaning practices, using environmentally friendly cleaning products, and investing in energy-efficient equipment. The shift to green cleaning not only meets client expectations but also positions service providers as socially responsible and environmentally conscious partners.

Certifications and accreditations related to sustainability, such as Leadership in Energy and Environmental Design (LEED), have become essential for janitorial service providers looking to differentiate themselves in the market. These certifications validate their commitment to environmentally friendly practices and provide a competitive edge in attracting environmentally conscious clients.

Moreover, the trend towards sustainability extends beyond cleaning products and practices to include waste reduction and responsible disposal. Janitorial service providers are exploring innovative ways to minimize their environmental footprint, such as implementing recycling programs, reducing single-use plastic, and optimizing waste management processes.

Integration of Health and Wellness Services

An emerging trend in the Janitorial Service Market is the integration of health and wellness services into cleaning offerings. The global awareness of health and hygiene, heightened by events like the COVID-19 pandemic, has prompted janitorial service providers to expand their services beyond traditional cleaning.

Service providers are increasingly offering services that contribute to indoor air quality,

such as air purification and ventilation system maintenance. This trend aligns with the growing recognition of the impact of indoor environmental quality on occupant health and well-being.

Additionally, janitorial service providers are incorporating specialized cleaning protocols designed to address health concerns, especially in high-traffic areas and sensitive environments like healthcare facilities and educational institutions. The use of antimicrobial treatments, targeted disinfection processes, and adherence to industry-specific health standards are becoming integral parts of janitorial service offerings.

Furthermore, the incorporation of wellness-focused cleaning practices extends to the selection of cleaning products that are hypoallergenic, non-toxic, and contribute to a healthier indoor environment. Clients are increasingly seeking janitorial services that prioritize the well-being of building occupants, creating a demand for comprehensive health-centric cleaning solutions.

Segmental Insights

Application Insights

In 2023, In the janitorial service market, the residential sector is experiencing rapid growth for several reasons. Firstly, with the increasing pace of urbanization, more people are residing in apartments, condos, and homes, necessitating a greater demand for cleaning services. Additionally, the rise of dual-income households has led to busier lifestyles, leaving homeowners with less time for household chores. Moreover, heightened awareness of hygiene and cleanliness, particularly due to public health concerns like the COVID-19 pandemic, has fueled the desire for professional cleaning assistance. These factors combined contribute to the residential segment emerging as the fastest-growing sector within the janitorial service market.

Regional Insights

In 2023, In 2023, North America emerged as the leading revenue contributor in the janitorial services market. The region's robust adoption rate and the presence of multinational corporations are key drivers fueling market expansion. Additionally, the growing emphasis on environmentally friendly solutions is bolstering market demand. According to the White House Office of Management and Budget, companies can realize substantial cost savings exceeding \$18 billion over the course of a project by investing in LEED-certified projects that incorporate effective janitorial care, further

driving demand in the region. With significant corporations and a strong focus on workplace wellness and cleanliness, the United States remains the dominant player in the market. Asia Pacific is anticipated to witness the fastest segment. This growth trajectory can be attributed to escalating commercial construction activities in the developing countries of Asia Pacific, which are expected to positively impact market expansion. The increasing prevalence of co-working spaces, a rise in the number of startups, and heightened investments by international companies in the region are further driving the demand for janitorial services.

Recent Developments

In 2024 - A cleaning service provider Clean Team OKC has revealed its expansion of commercial cleaning services to Yukon. The company now provides a comprehensive range of solutions tailored to meet the varied needs of both businesses and residents in the locality.

In 2024 - Guardian Saints Commercial Cleaning, helmed by seasoned entrepreneur Amber Pizano, proudly unveils its debut, offering top-tier cleaning solutions to the vibrant DFW region. With a focus on expansive commercial offices and esteemed professional buildings spanning various sectors, the company aims to set a new standard in cleanliness and service excellence.

Key Market Players

ABM Industries Inc.

The ServiceMaster Company, LLC

Coverall North America, Inc.

Jani-King International, Inc.

Stanley Steemer International, Inc.

Aeon Delight Co., Ltd.

CNS Consorzio Nazionale Servizi Soc. Coop.

ISS World Services A/S

Mitie Group plc

WISAG Facility Service Holding GmbH

Report Scope:

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

Janitorial Service Market, By Application:

Residential

Commercial

Janitorial Service Market, By End Use:

Standard Cleaning

Damage Restoration Cleaning

Exterior Window Cleaning

Floor Care Services

Others

Janitorial Service 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

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Janitorial Service Market.

Available Customizations:

Janitorial Service 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

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

Contents

1. INTRODUCTION

- 1.1. Product Overview
- 1.2. Key Highlights of the Report
- 1.3. Market Coverage
- 1.4. Market Segments Covered
- 1.5. Research Tenure Considered

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

4. VOICE OF CUSTOMER

- 4.1. Factors Influencing Purchase Decisions
- 4.2. Challenges Faced

5. GLOBAL JANITORIAL SERVICE MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Application Market Share Analysis (Residential, Commercial)
 - 5.2.2. By End Use Market Share Analysis (Standard Cleaning, Damage Restoration)

Cleaning, Exterior Window Cleaning, Floor Care Services, Others)

5.2.3. By Regional Market Share Analysis

5.2.3.1. North America Market Share Analysis

5.2.3.2. South America Market Share Analysis

5.2.3.3. Middle East & Africa Market Share Analysis

5.2.3.4. Europe Market Share Analysis

5.2.3.5. Asia-Pacific Market Share Analysis

5.2.4. By Top 5 Companies Market Share Analysis, Others (2023)

5.3. Global Janitorial Service Market Mapping & Opportunity Assessment

5.3.1. By Application Market Mapping & Opportunity Assessment

5.3.2. By End Use Market Mapping & Opportunity Assessment

5.3.3. By Region Market Mapping & Opportunity Assessment

6. NORTH AMERICA JANITORIAL SERVICE MARKET OUTLOOK

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Application Market Share Analysis

6.2.2. By End Use Market Share Analysis

6.2.3. By Country Market Share Analysis

6.3. North America: Country Analysis

6.3.1. United States Janitorial Service Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Application Market Share Analysis

6.3.1.2.2. By End Use Market Share Analysis

6.3.2. Canada Janitorial Service Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Application Market Share Analysis

6.3.2.2.2. By End Use Market Share Analysis

6.3.3. Mexico Janitorial Service Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Application Market Share Analysis

6.3.3.2.2. By End Use Market Share Analysis

7. EUROPE JANITORIAL SERVICE MARKET OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Application Market Share Analysis

7.2.2. By End Use Market Share Analysis

7.2.3. By Country Market Share Analysis

7.3. Europe : Country Analysis

7.3.1. Germany Janitorial Service Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Application Market Share Analysis

7.3.1.2.2. By End Use Market Share Analysis

7.3.2. United Kingdom Janitorial Service Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Application Market Share Analysis

7.3.2.2.2. By End Use Market Share Analysis

7.3.3. Italy Janitorial Service Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Application Market Share Analysis

7.3.3.2.2. By End Use Market Share Analysis

7.3.4. France Janitorial Service Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Application Market Share Analysis

7.3.4.2.2. By End Use Market Share Analysis

7.3.5. Spain Janitorial Service Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Application Market Share Analysis

7.3.5.2.2. By End Use Market Share Analysis

8. ASIA-PACIFIC JANITORIAL SERVICE MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Application Market Share Analysis

8.2.2. By End Use Market Share Analysis

8.2.3. By Country Market Share Analysis

8.3. Asia-Pacific: Country Analysis

8.3.1. China Janitorial Service Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Application Market Share Analysis

8.3.1.2.2. By End Use Market Share Analysis

8.3.2. India Janitorial Service Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Application Market Share Analysis

8.3.2.2.2. By End Use Market Share Analysis

8.3.3. Japan Janitorial Service Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Application Market Share Analysis

8.3.3.2.2. By End Use Market Share Analysis

8.3.4. South Korea Janitorial Service Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Application Market Share Analysis

8.3.4.2.2. By End Use Market Share Analysis

8.3.5. Australia Janitorial Service Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

- 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Application Market Share Analysis
 - 8.3.5.2.2. By End Use Market Share Analysis

9. SOUTH AMERICA JANITORIAL SERVICE MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Application Market Share Analysis
 - 9.2.2. By End Use Market Share Analysis
 - 9.2.3. By Country Market Share Analysis
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Janitorial Service Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Application Market Share Analysis
 - 9.3.1.2.2. By End Use Market Share Analysis
 - 9.3.2. Argentina Janitorial Service Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Application Market Share Analysis
 - 9.3.2.2.2. By End Use Market Share Analysis
 - 9.3.3. Colombia Janitorial Service Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Application Market Share Analysis
 - 9.3.3.2.2. By End Use Market Share Analysis

10. MIDDLE EAST AND AFRICA JANITORIAL SERVICE MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Application Market Share Analysis
 - 10.2.2. By End Use Market Share Analysis

10.2.3. By Country Market Share Analysis

10.3. MEA: Country Analysis

10.3.1. South Africa Janitorial Service Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Application Market Share Analysis

10.3.1.2.2. By End Use Market Share Analysis

10.3.2. Saudi Arabia Janitorial Service Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Application Market Share Analysis

10.3.2.2.2. By End Use Market Share Analysis

10.3.3. UAE Janitorial Service Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Application Market Share Analysis

10.3.3.2.2. By End Use Market Share Analysis

10.3.4. Turkey Janitorial Service Market Outlook

10.3.4.1. Market Size & Forecast

10.3.4.1.1. By Value

10.3.4.2. Market Share & Forecast

10.3.4.2.1. By Application Market Share Analysis

10.3.4.2.2. By End Use Market Share Analysis

10.3.5. Egypt Janitorial Service Market Outlook

10.3.5.1. Market Size & Forecast

10.3.5.1.1. By Value

10.3.5.2. Market Share & Forecast

10.3.5.2.1. By Application Market Share Analysis

10.3.5.2.2. By End Use Market Share Analysis

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

13. SWOT ANALYSIS

- 13.1. Strength
- 13.2. Weakness
- 13.3. Opportunity
- 13.4. Threat

14. COMPETITIVE LANDSCAPE

14.1. Company Profiles

14.1.1. ABM Industries Inc.

- 14.1.1.1. Company Details
- 14.1.1.2. Products & Services
- 14.1.1.3. Financials (As Per Availability)
- 14.1.1.4. Key Market Focus & Geographical Presence
- 14.1.1.5. Recent Developments
- 14.1.1.6. Key Management Personnel

14.1.2. The ServiceMaster Company, LLC

- 14.1.2.1. Company Details
- 14.1.2.2. Products & Services
- 14.1.2.3. Financials (As Per Availability)
- 14.1.2.4. Key Market Focus & Geographical Presence
- 14.1.2.5. Recent Developments
- 14.1.2.6. Key Management Personnel

14.1.3. Coverall North America, Inc.

- 14.1.3.1. Company Details
- 14.1.3.2. Products & Services
- 14.1.3.3. Financials (As Per Availability)
- 14.1.3.4. Key Market Focus & Geographical Presence
- 14.1.3.5. Recent Developments
- 14.1.3.6. Key Management Personnel

14.1.4. Jani-King International, Inc.

- 14.1.4.1. Company Details
- 14.1.4.2. Products & Services
- 14.1.4.3. Financials (As Per Availability)
- 14.1.4.4. Key Market Focus & Geographical Presence
- 14.1.4.5. Recent Developments
- 14.1.4.6. Key Management Personnel

- 14.1.5. Stanley Steamer International, Inc.
 - 14.1.5.1. Company Details
 - 14.1.5.2. Products & Services
 - 14.1.5.3. Financials (As Per Availability)
 - 14.1.5.4. Key Market Focus & Geographical Presence
 - 14.1.5.5. Recent Developments
 - 14.1.5.6. Key Management Personnel
- 14.1.6. Aeon Delight Co., Ltd.
 - 14.1.6.1. Company Details
 - 14.1.6.2. Products & Services
 - 14.1.6.3. Financials (As Per Availability)
 - 14.1.6.4. Key Market Focus & Geographical Presence
 - 14.1.6.5. Recent Developments
 - 14.1.6.6. Key Management Personnel
- 14.1.7. CNS Consorzio Nazionale Servizi Soc. Coop.
 - 14.1.7.1. Company Details
 - 14.1.7.2. Products & Services
 - 14.1.7.3. Financials (As Per Availability)
 - 14.1.7.4. Key Market Focus & Geographical Presence
 - 14.1.7.5. Recent Developments
 - 14.1.7.6. Key Management Personnel
- 14.1.8. ISS World Services A/S
 - 14.1.8.1. Company Details
 - 14.1.8.2. Products & Services
 - 14.1.8.3. Financials (As Per Availability)
 - 14.1.8.4. Key Market Focus & Geographical Presence
 - 14.1.8.5. Recent Developments
 - 14.1.8.6. Key Management Personnel
- 14.1.9. Mitie Group plc
 - 14.1.9.1. Company Details
 - 14.1.9.2. Products & Services
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Key Market Focus & Geographical Presence
 - 14.1.9.5. Recent Developments
 - 14.1.9.6. Key Management Personnel
- 14.1.10. WISAG Facility Service Holding GmbH
 - 14.1.10.1. Company Details
 - 14.1.10.2. Products & Services
 - 14.1.10.3. Financials (As Per Availability)

14.1.10.4. Key Market Focus & Geographical Presence

14.1.10.5. Recent Developments

14.1.10.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS

15.1. Key Focus Areas

15.2. Target Application

15.3. Target End Use

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