

## PRESS RELEASE

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### FACILITIES MANAGEMENT MARKET IN SWITZERLAND: CONSOLIDATION AND SUSTAINABILITY DRIVE GROWTH

- **Leading Swiss service providers grow by 8.6 per cent**
- **Sustainability and energy conservation provide impetus for growth**
- **FM becomes strategically more important for real estate investors**
- **New Lünendonk List now available**

**Mindelheim, July 4, 2023** – The top ten facilities management providers grew 8.6 per cent year-on-year in 2022. This is a significant increase compared to 2020, when the companies increased their revenues by 0.3 per cent in the shadow of the pandemic. The ten leading providers account for around 20 per cent of facilities services market volumes in Switzerland, estimated by Lünendonk at CHF 12.5 billion.

These are the initial findings of the new Lünendonk List of leading facilities management providers in Switzerland, now available as a free download from [www.luenendonk.de](http://www.luenendonk.de). The comprehensive and detailed market survey, detailing the market structure and current issues and trends, will be published in September.

#### **Rankings in detail**

Market leader ISS generated revenues of 772.7 million Swiss francs in 2022 and had 12,000 employees. Included in these figures are the revenue and employee numbers for Livit FM, acquired by ISS from Swiss Life.

Bouygues Energies & Services comes second, with total revenues of 479 million Swiss francs, thanks in part to the acquisition of Equans (formerly Engie). Figures for Helion, which was sold to AMAG, are no longer included here. Overall, Bouygues Energies & Services' books reveal growth of 26.1 per cent or 99 million Swiss francs compared to the previous year (CHF 380 million). Bouygues thus made significant inroads into the lead of first-placed ISS, shrinking the gap between from 377 million to 293 million Swiss francs. CBRE Global Workplace Solutions completes the top three with revenues of 325.6 million Swiss francs (+4.5%).

Vebegeo follows in fourth place with revenues now totalling 281 million Swiss francs (+7.7%). Since acquiring Hectas in Germany and Austria, Netherlands-based Vebegeo, like ISS and CBRE, now has facilities services operations in all three DACH countries.

Completing the top five is Apleona, with 2022 revenues of 170.5 million Swiss francs generated by 1,574 employees. Apleona and Honegger (ranked seventh, CHF 163 million) each climb one rank since the Bouygues purchase of Engie/Equans means the latter no longer features separately in the rankings. Honegger's acquisition of Onet's facilities management business is included in the figures.

Dosim, headquartered in Plan-les-Ouates, is a new addition to the listings with annual revenues of 154 million Swiss francs. The company principally operates in French-speaking Switzerland but is expanding its activities in the country's German-speaking regions. Eighth, ninth and tenth place go to gammaRenax with annual revenues of 82 million Swiss francs, Stampfli with estimated revenues of 70 million Swiss francs, and French company Sodexo's Swiss subsidiary, headquartered in Glattbrugg. Sodexo's annual revenues amounted to 59 million Swiss francs.

**Sustainable real estate operations strengthen facilities management**

The facilities management providers see the increased importance of sustainability in the real estate industry as an important stimulus for market development. This is driven both by higher energy prices in the wake of the Ukraine war as well as by EU regulations, increasingly important for Swiss companies due to access to the EU capital market. As a result, facilities management is gaining strategic importance for real estate investors and operators, both of whom are working closely with service companies on sustainability reporting as well as in the identification and implementation of appropriate measures to take.

Study author Thomas Ball, partner at Lünendonk & Hossenfelder, comments: ‘In recent years, the Swiss facilities management market already demonstrated a high degree of maturity, also when compared to Austria and Germany. Society’s efforts towards decarbonisation are further strengthening the industry, as asset managers are now more dependent on partnering with facilities management, too.’

**Related publication**

The new Lünendonk List *Leading Facilities Management Providers in Switzerland* is now available as a free download from [www.luenendonk.de](http://www.luenendonk.de). The comprehensive Lünendonk Survey of the market and leading companies will be published in September 2023 and will contain in-depth analysis of key indicators and of the relevance of current issues and trends. Nineteen service providers were included in the detailed survey. It can be pre-ordered at a price of 2,200 Swiss francs (plus applicable taxes, incl. delivery as a PDF file).

**Quotes for the Lünendonk List 2023****Michael Rohner, CEO, Apleona Switzerland:**

*'In our interactions here at Apleona with customers, employees and suppliers ESG is clearly a very important issue. Project and consulting demand from our customers has been increasing in this area for some time. Careful and sustainable use of resources combined with social responsibility and good governance/corporate management practices lead to risk reduction, sustainable added value and climate targets being achieved; it's impossible for companies to get away from this today. Apleona's ECO-Vadis Platinum certification confirms the significant efforts we're making in this area every day.'*

**Jochen Scraback, Managing Director, CBRE GWS Switzerland:**

*'CBRE GWS Switzerland sees the market in Switzerland as highly competitive and price sensitive. Energy costs and savings via optimal operation of technical building infrastructure are particular areas of focus for our customers. As a technically oriented integrated facilities management service provider, CBRE GWS Switzerland can generate considerable added value for our clients in this area. Our HVAC, refrigeration, plumbing and electrical technical service portfolio has enabled us to consistently implement our growth strategy.'*

## **Company profile**

### **Lünendonk: background information**

Lünendonk & Hossenfelder, based in Mindelheim (Bavaria), has been analysing the European business-to-business (B2B) services markets since 1983. Its market researchers focus on business and digital & IT consulting, audit, tax and advisory consulting, real estate services and the staffing industry (temporary employment and staffing).

The company's portfolio includes surveys, publications, benchmarks and consultancy around trends, pricing, positioning and contracting procedures. This large data pool gives Lünendonk access to unique insights for advising clients. Regarded as market barometers, the Lünendonk® Lists and Surveys have been published by the market research and consulting company for decades now.

With years of experience, deep understanding, a brilliant network and – last but by no means least – a passion for people and market research, Lünendonk and its consultants are sought-after among service providers, their customers and indeed journalists for their expertise. Each year, Lünendonk partners with a jury from the media to honour deserving companies and entrepreneurs with the Lünendonk Service Awards.

### **Further information**

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