

LÜNENDONK „

Lünendonk® Survey 2025

Facilities Management Companies in Germany

A market analysis of hard and soft facilities management

A survey by Lünendonk & Hossenfelder

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Foreword

Dear readers,

Broader conditions in the real estate sector are changing significantly, and not only superficially. With new residential construction stalling in many locations, existing buildings are increasingly becoming the focus for investors, asset managers, and political decision-makers. Attention is shifting towards maintaining, modernising, and efficiently operating current properties. Rather than being a short-term trend, this change in outlook is symptomatic of a deeper structural realignment, with far-reaching implications for facilities management.

This represents both a significant opportunity for the sector, as well as a growing responsibility. After all, it is during property's operational stage that its usability, sustainability, economic efficiency, and future viability are determined. Facilities management thus becomes a key interface for addressing the urgent issues of our time such as climate protection, energy efficiency, user comfort, and the conservation of resources.

Once merely a vision, this paradigm shift is now reflected in current market data. Revenues of the 25 leading facilities services providers in Germany increased by an average of 7.8 per cent in 2024. This is a remarkable figure, especially set against the backdrop of a broadly stagnant macroeconomic environment. While growth may have slowed year-on-year, its resilience underscores the sector's stability and relevance in volatile circumstances.

Sustainability will remain a key driver of future improvements in revenues. While the European omnibus process has eased reporting requirements for smaller companies, the strategic direction remains clear: ESG criteria, decarbonisation targets, and disclosure obligations are becoming the touchstone for corporate business and are fundamentally transforming property operation. Digital infrastructure, reliable data, and smart tools are crucial to the efficient implementation of both modern operational strategies and regulatory requirements. Facilities management is moving towards being a digital integration platform spanning a property's entire lifecycle – one that is data-driven, interconnected, and forward-looking.



Wolf-Dieter Adlhoch

Chair of the Board, gefma –
The German Facility Management
Association



FOREWORD

Facilities Management Companies in Germany

The ongoing shortage of skilled labour, too, is increasingly acting as a catalyst for innovation, with pressure mounting to develop AI-supported services; not as an end in themselves, but to ensure the continued performance and reliability of facilities management. It is a trend that reflects the confidence of a sector defined not by scarcity, but by a growing strength stemming from its digital transformation.

The present Lünendonk Survey offers far more than mere figures and rankings. It highlights the maturity and strategic importance of facilities management. And shows how our industry remains on a path towards growth. This is a sector that is actively shaping a sustainable, digital, and economically viable future for the built environment.

I invite you to pay careful attention to this survey and to use it both as inspiration for your own innovation and as a resource for deeper understanding of a sector with significant untapped potential for growth.

Yours faithfully,
Wolf-Dieter Adlhoch
Chairman of the Board
gefma – The German Facility Management Association



Management Summary

- The present Lünendonk Survey analyses 73 facilities services companies. Collectively, they employ more than 400,000 people and represent 36 per cent of the total market volume.
- In the 2024 financial year, market volume increased by 3.2 per cent to 66.9 billion euros. Average revenue growth among the companies studied was 6.2 per cent. Weighted by domestic revenue, growth rates reached 8.3 per cent. The Top 25 companies recorded stronger average growth than smaller and mid-sized providers.
- The service-provider workforce, by contrast, grew by just 2.6 per cent. Shortages of skilled and unskilled workers remain the biggest obstacles to corporate success. Employer branding strategies are becoming increasingly important as a means of improving employer attractiveness.
- Changing political circumstances are presenting the industry with new challenges. The EU omnibus process has led to a relaxation of key sustainability requirements, in turn dampening the otherwise positive prospects for sustainable services markets. The increase in the statutory minimum wage is also putting pressure on margins.
- Digital transformation is playing an increasingly important role in corporate strategy. Key areas of focus include process automation, digital data collection, and systems integration. The deployment of artificial intelligence is the leading digital trend currently.
- A growing number of service providers are investing in robotic solutions, especially for cleaning buildings, the most significant area of application at present.
- Price-driven contract awards, rising labour and material costs, and increasing demands for personnel are among the most pressing challenges facing facilities services companies.

€ 66.9 billion

Market volume increased by 3.2 per cent

Revenue

Average revenue growth stands at 6.2 per cent

Staff

Workforce employed by service providers grew by 2.6 per cent

Key topics and trends

Process automation, digital data capture, AI & robotics solutions

Introduction

The facilities services market is one of the most important B2B service markets in Germany in view of its size. It is characterised by high labour intensity, long-term client relationships, and a wide range of soft, hard, and commercial facilities services. Despite economic uncertainty, the market has demonstrated remarkable stability over the years – not least thanks to long-term contractual structures and the consistently high demand for professional property management.

High robustness in a volatile environment

However, the sector is also undergoing transformation, with the persistent shortage of skilled labour, rising sustainability requirements, and increasing digitalisation directly influencing business models, service portfolios, and investment strategies. Client expectations are evolving – as are demands around quality, efficiency, and transparency.

Lünendonk & Hossenfelder has been publishing its annual Lünendonk Survey on the German facilities management market since 2004. It is based on primary market data and provides in-depth analysis of industry developments, structural trends, strategic challenges, and current issues relevant to both service providers and their clients.

The Lünendonk Survey has long offered clients reliable insights into developments within the provider landscape as well as into both established and emerging service models in facilities management. Service providers can use the robust data to benchmark their own corporate performance against the overall market. For investors, clients, consultants, and market observers, the survey provides a rigorous examination of strategically relevant themes and trends within the current market context.

Lünendonk Survey offers guidance

STRUCTURE OF THE SURVEY

The Lünendonk Survey is divided into two main sections. The initial editorial part features analysis and commentary by Lünendonk & Hossenfelder on the key developments in the facilities services market. This section is particularly aimed at readers interested in a data-based, analytical assessment of market dynamics and strategic challenges. The assessments are based on the findings of the current survey combined with Lünendonk & Hossenfelder's long-standing market monitoring.



INTRODUCTION

Facilities Management Companies in Germany

SURVEY PARTICIPANTS ACCOUNT FOR OVER ONE THIRD OF TOTAL MARKET VOLUME

Share of survey participants' revenue in the external market volume 2024

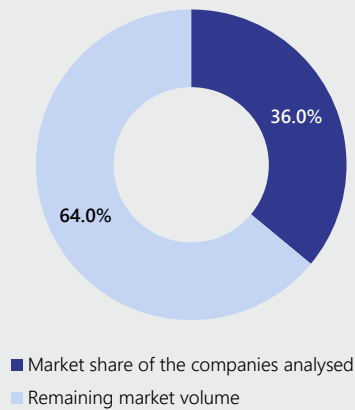
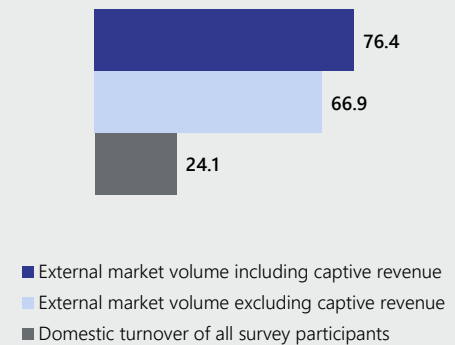


Fig. 1: Share of survey participants in market volume

Market volume and survey participants' total revenue in absolute terms in billion euros



The second part serves as the results section, containing a detailed evaluation of this year's survey. The findings are presented in a structured manner, featuring time-series comparisons, breakdowns by revenue group/sector/service portfolio and in-depth analysis of specific topics. In this way the results section provides a robust basis for market analysis, competitive benchmarking, and strategic decision-making.

Extensive FM
database

EVALUATION GROUPS

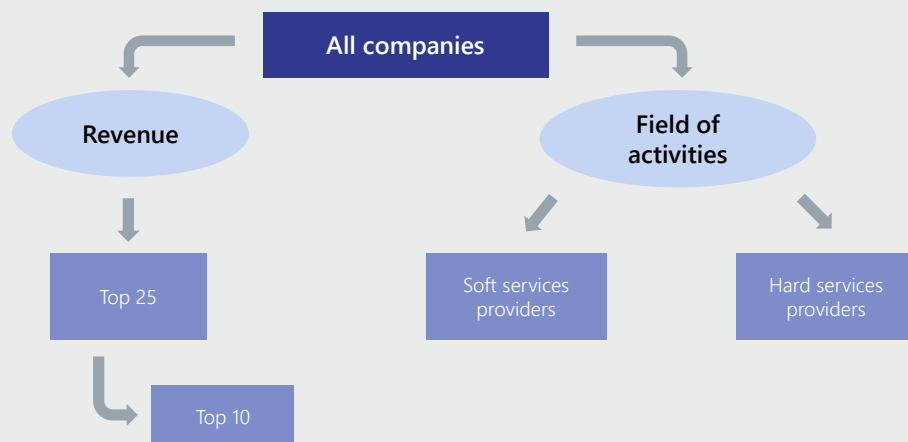


Fig. 2: Overview of the evaluation groups