SOCIAL CARE SUMMIT

17 June 2026

MARKET TRENDS AND PROJECTIONS

SCALE

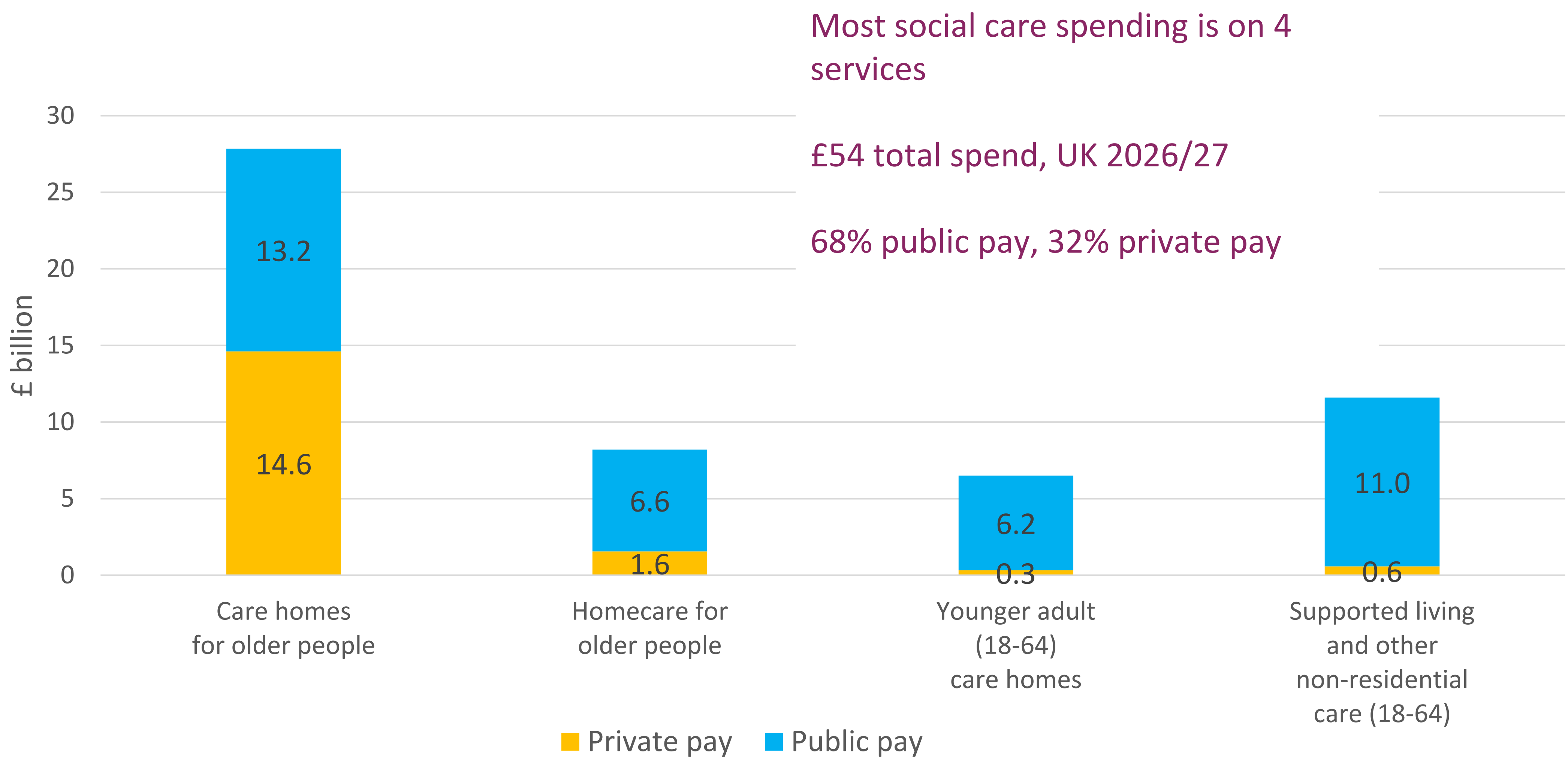
UK 2026/27

c. £54 billion spent on formal, long-term care

services supporting 1.4 million people

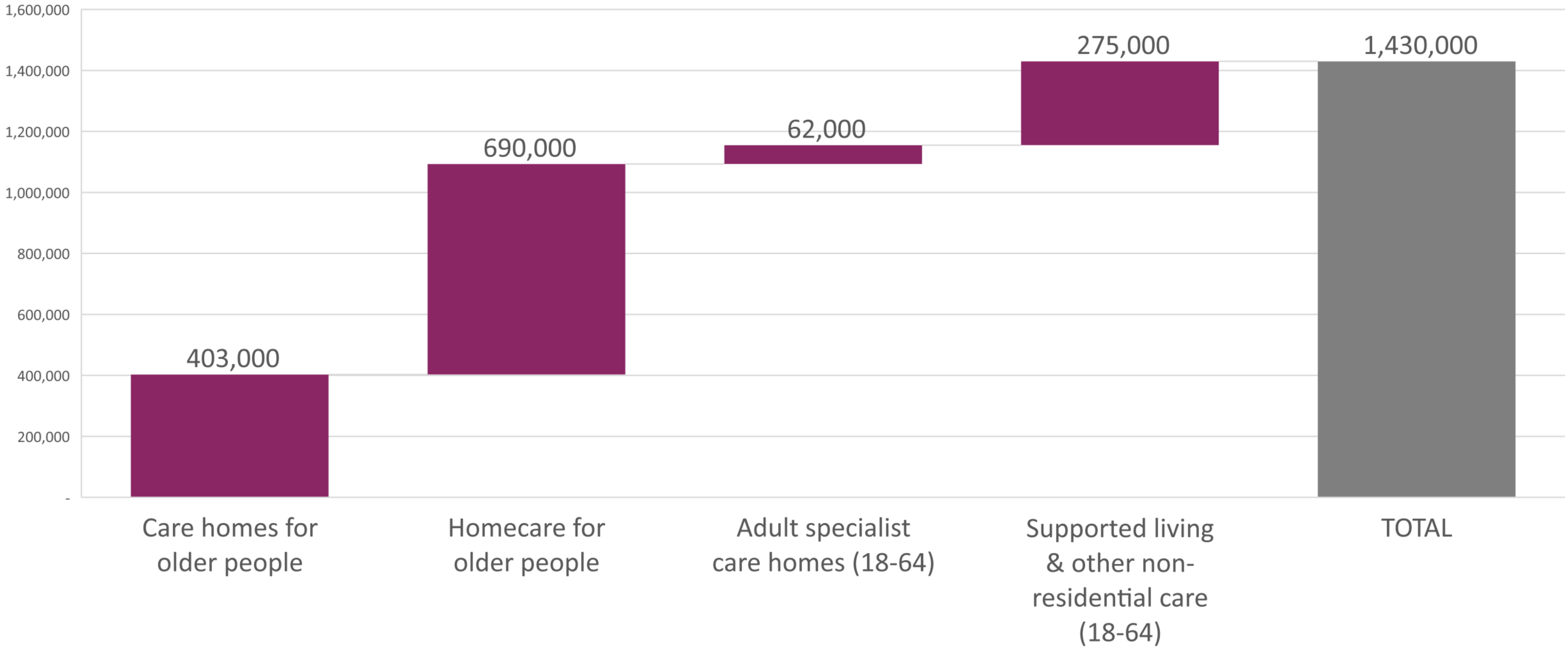
in 2025/26

UK SOCIAL CARE MARKET VALUE, UK 2026/27 £bn.
residential + non-residential care (exc. Direct Payments)



LaingBuisson
INTELLIGENCE + INSIGHT

ADULT SERVICE USERS, UK 2026
residential + non-residential care



£ per Service User per year, UK 2026/27
residential + non-residential care

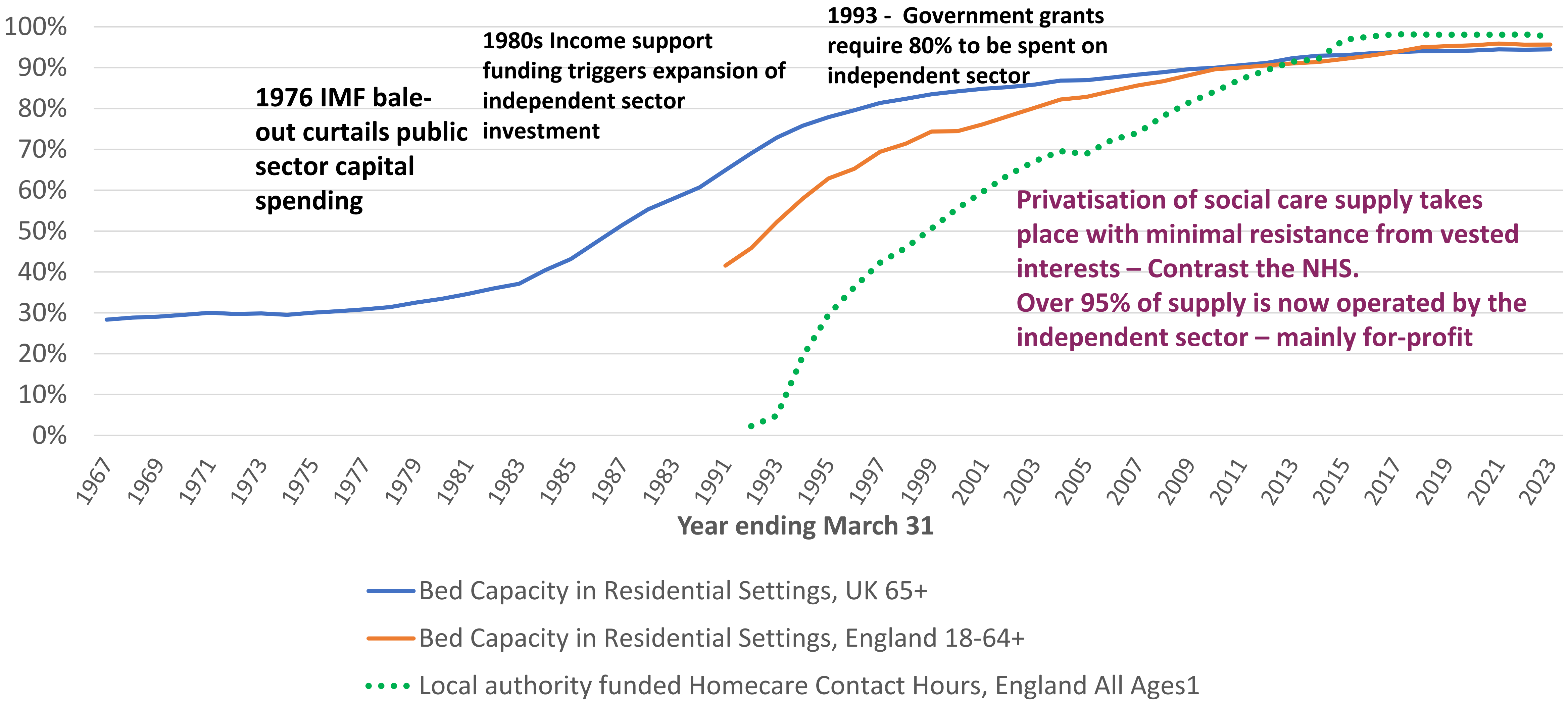
LaingBuisson
INTELLIGENCE + INSIGHT

EVOLUTION OF THE SOCIAL CARE MARKET

Privatisation of traditional welfare state model

over 5 decades

Independent sector penetration of the social care market



LaingBuisson
INTELLIGENCE + INSIGHT

SOCIAL CARE MARKETS ARE

HIGHLY FRAGMENTED

Good for competition,
but micro providers can be fragile

CONCENTRATION RATIOS – market share controlled by 4 leading providers

Segment	Top 4 Market Share	Metric
Private medical insurance	92%	£ value of premiums
Mental health hospitals	70%	Capacity (beds)
Independent acute medical/surgical hospitals	62%	£ turnover
Foster care	41%	£ turnover
Children's homes	25%	Capacity (beds)
Special education	19%	Capacity (beds)
Dentistry	17%	£ value of turnover
Care homes for older people	10.8%	£ turnover
Home care & supported living	9%	£ turnover
Younger adult care homes	8%	£ turnover

There are several large corporate social care providers with revenues upwards of £500m
But more than 80% of social care capacity is in the hands of SMEs and micro providers
LaingBuisson considers there is no industrial logic in consolidation to a handful of mega groups

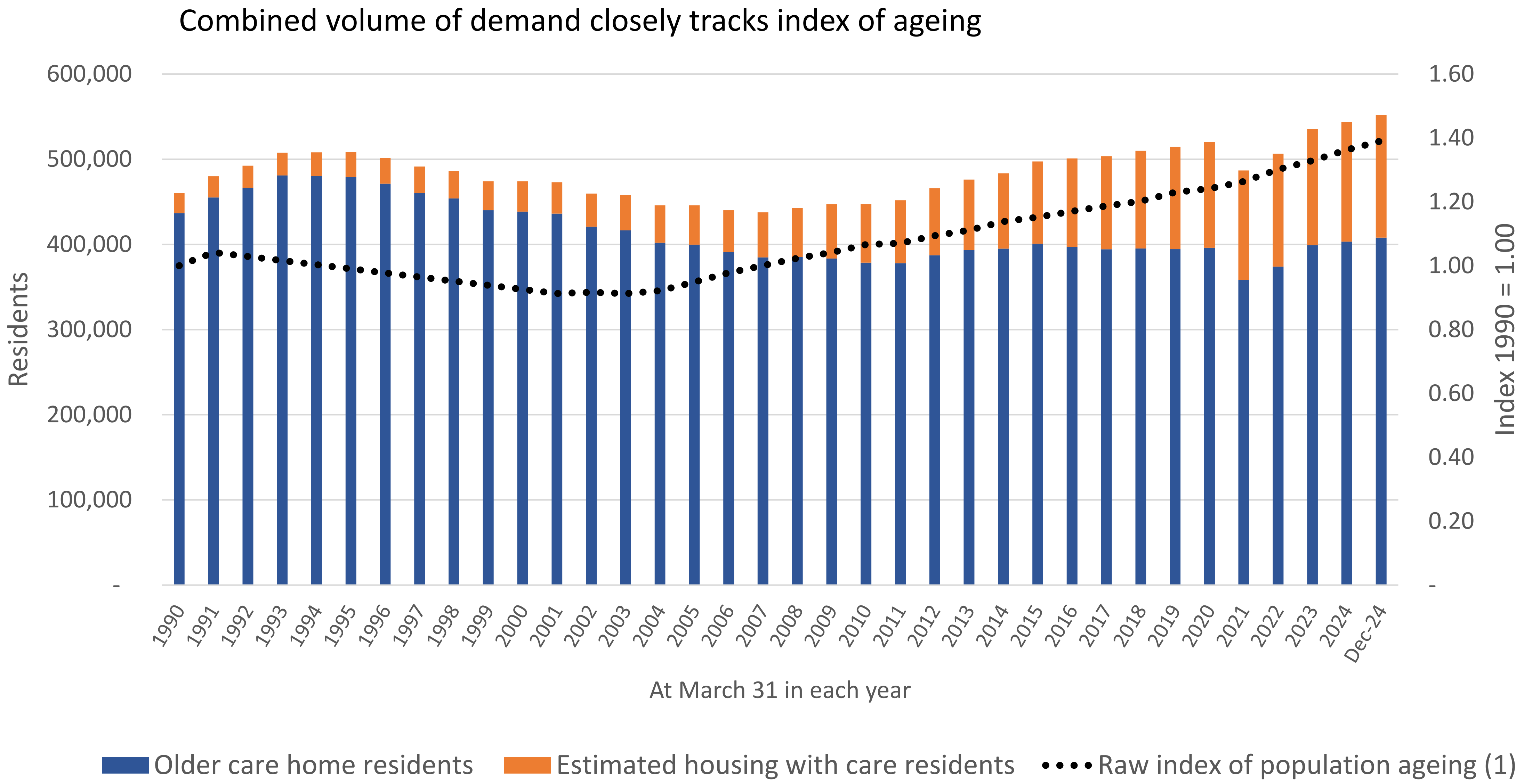
MARKET DEMAND TRENDS

Substitution of older care home demand with homecare and 'extra care'

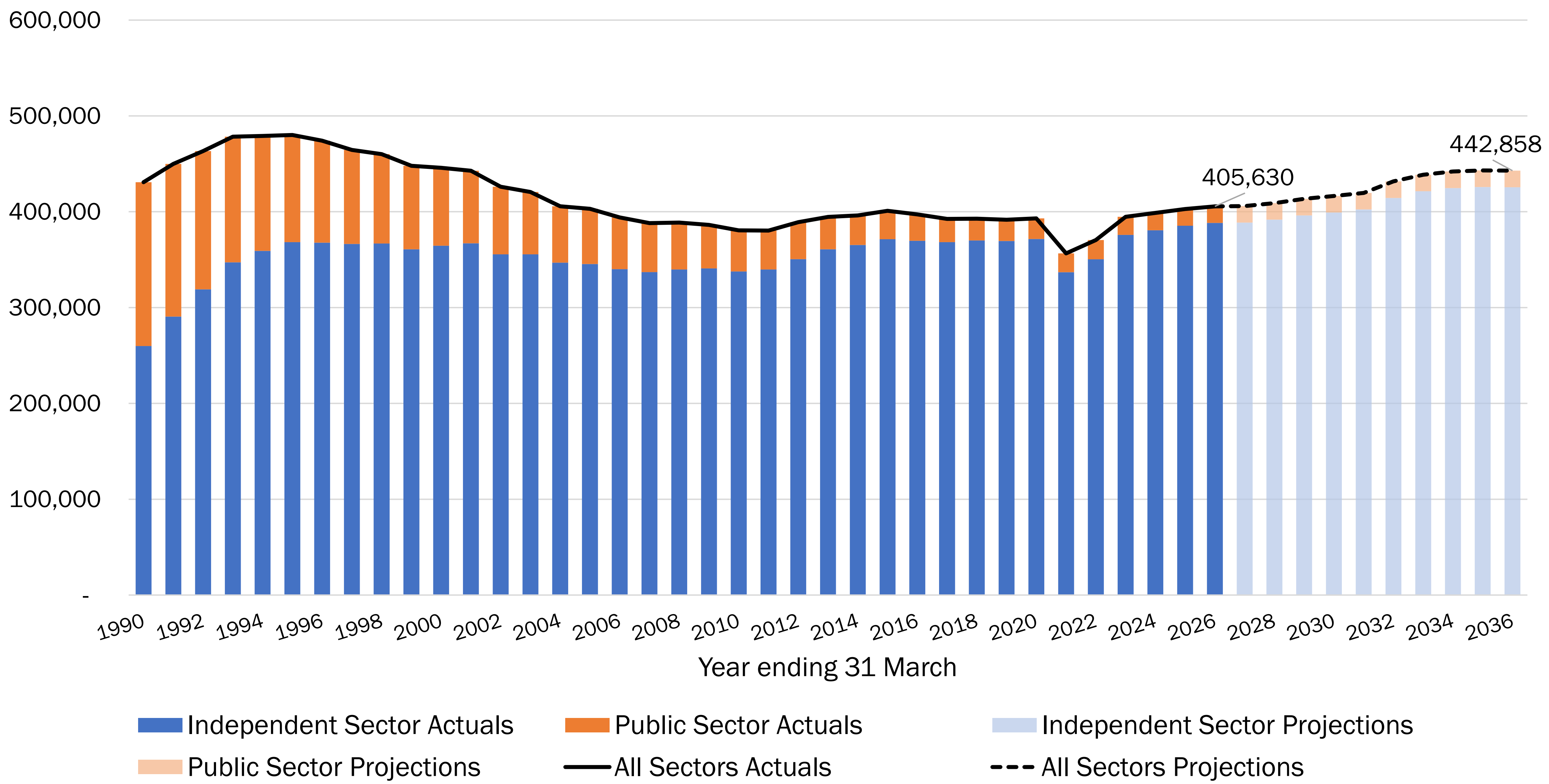
Despite this, modest expansion of care home demand is projected

Is expansion of supported living tapering off?

Older residents of care homes + housing with care, UK 1990-2024

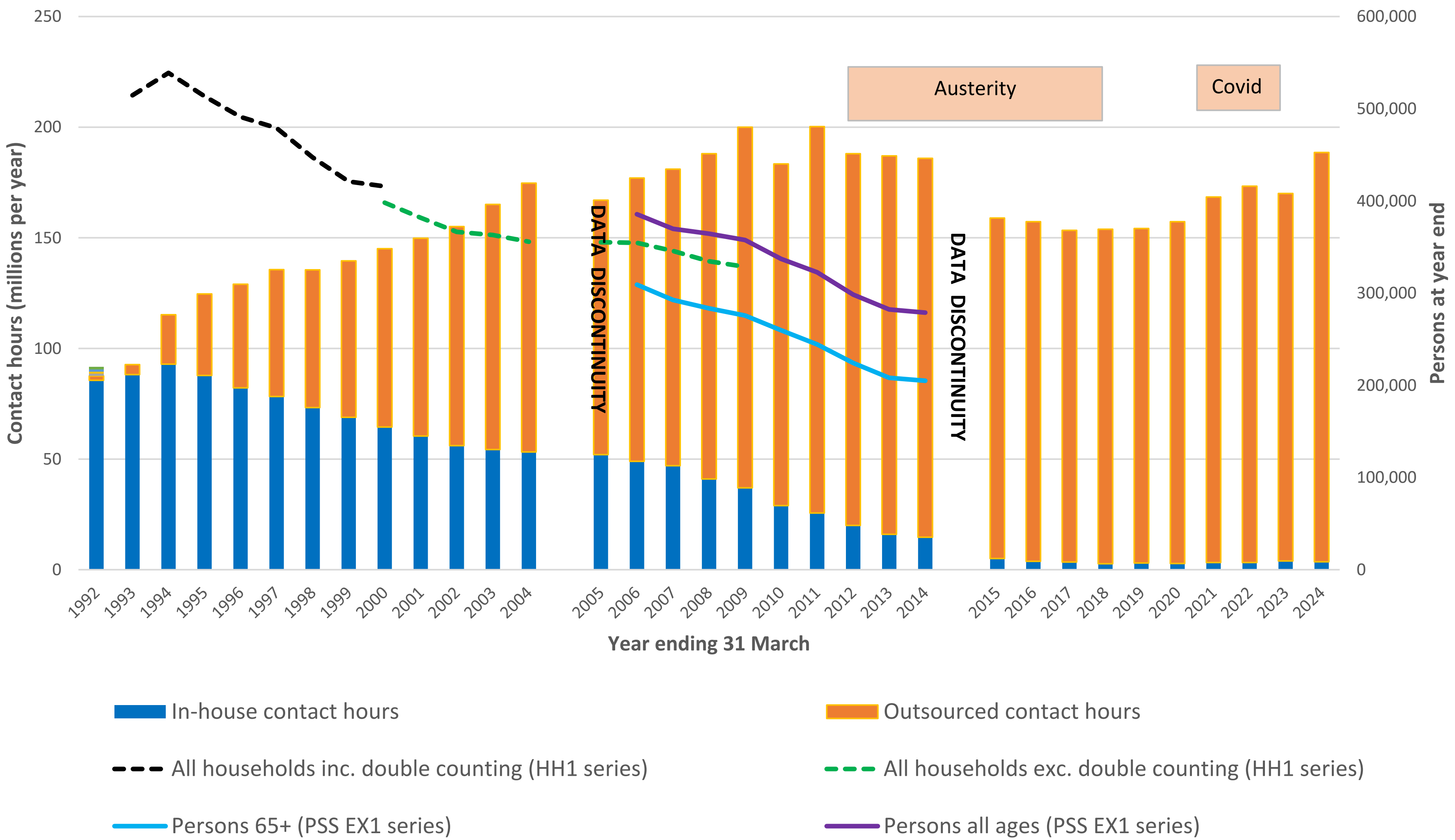


Projected volume of demand for care homes for older people, UK 2026 - 2036



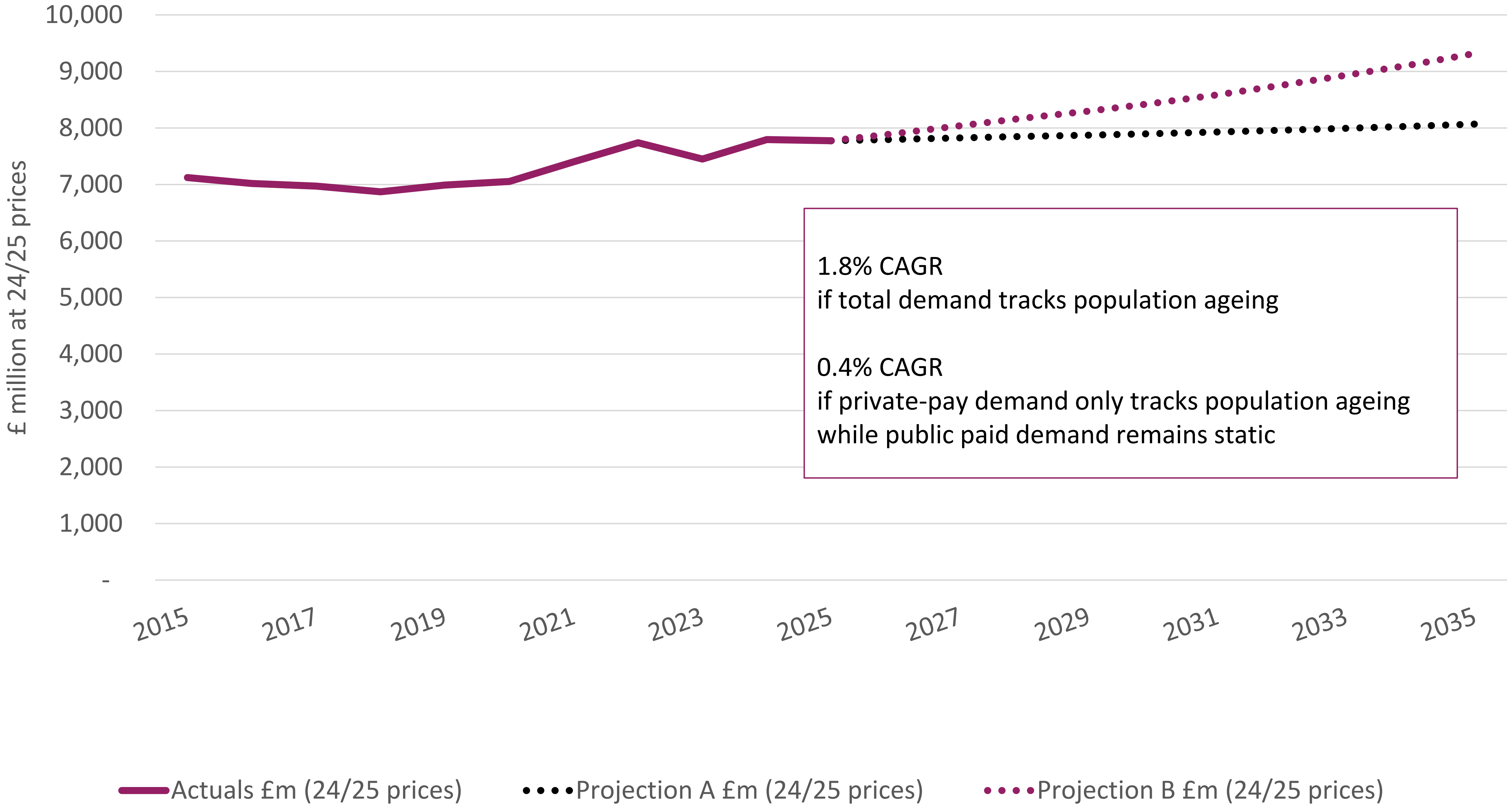
INTELLIGENCE + INSIGHT

Council commissioned homecare, England

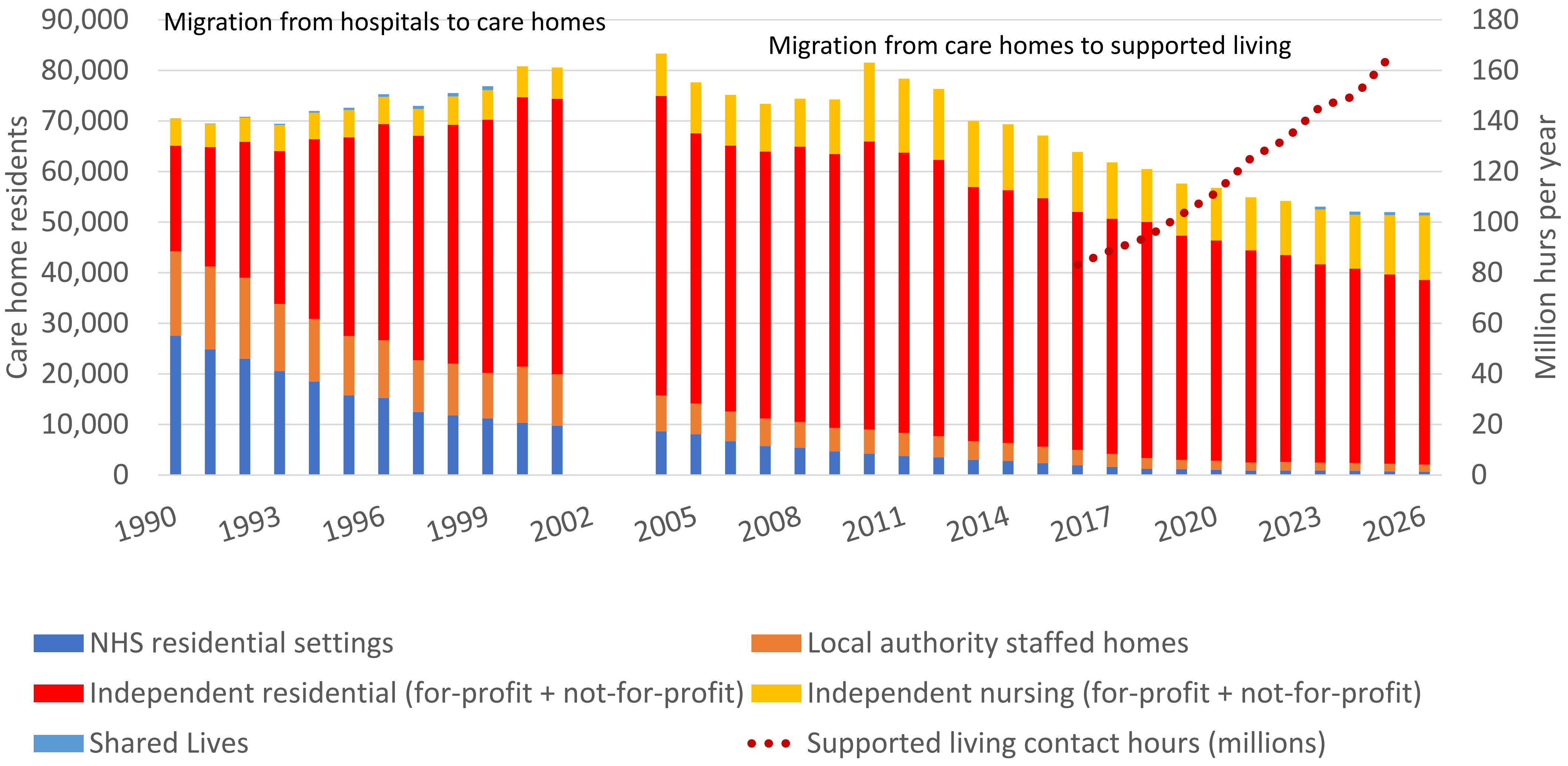


LaingBuisson
INTELLIGENCE + INSIGHT

Projection of homecare market growth (real terms)

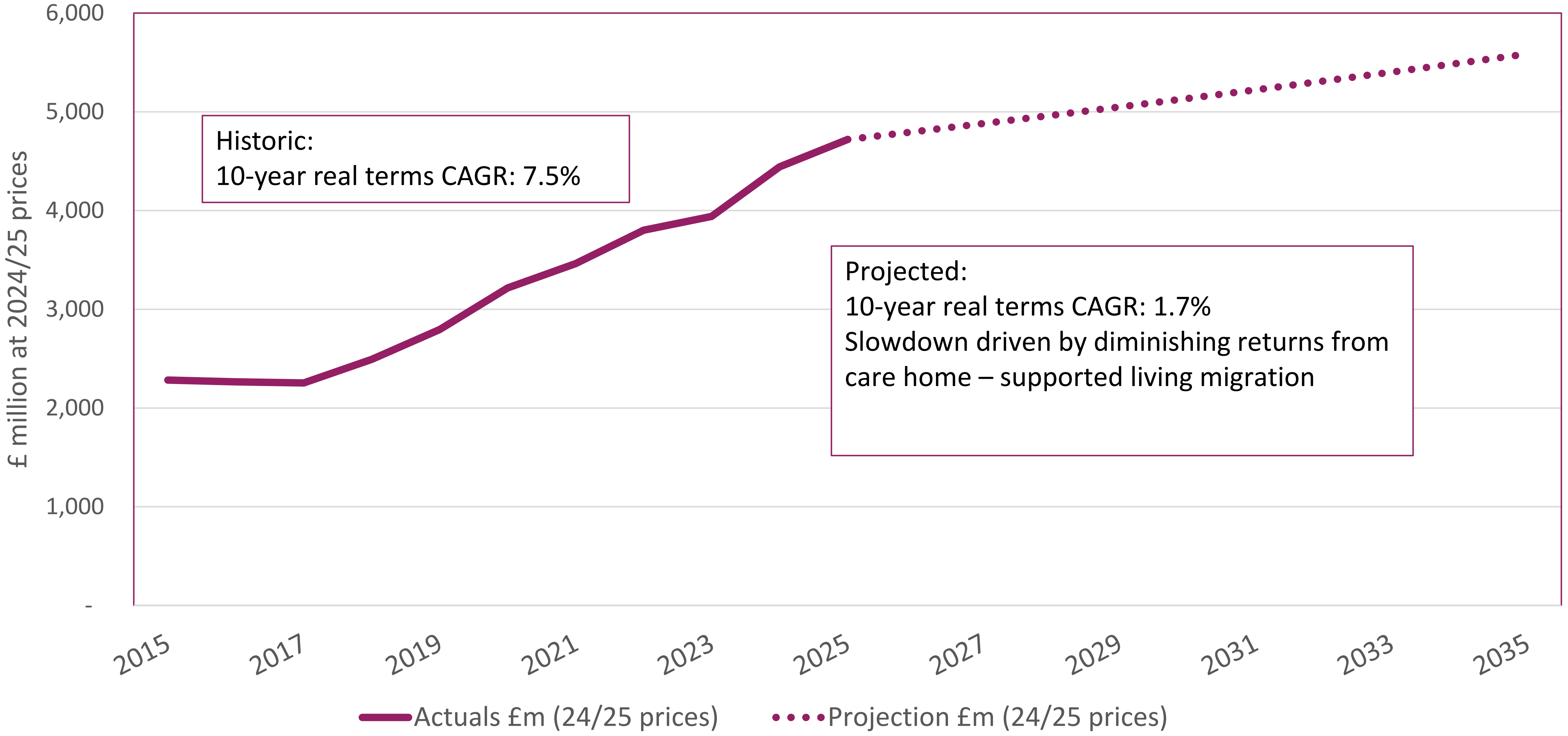


Younger adult (18-64) care home & supported living trends, England



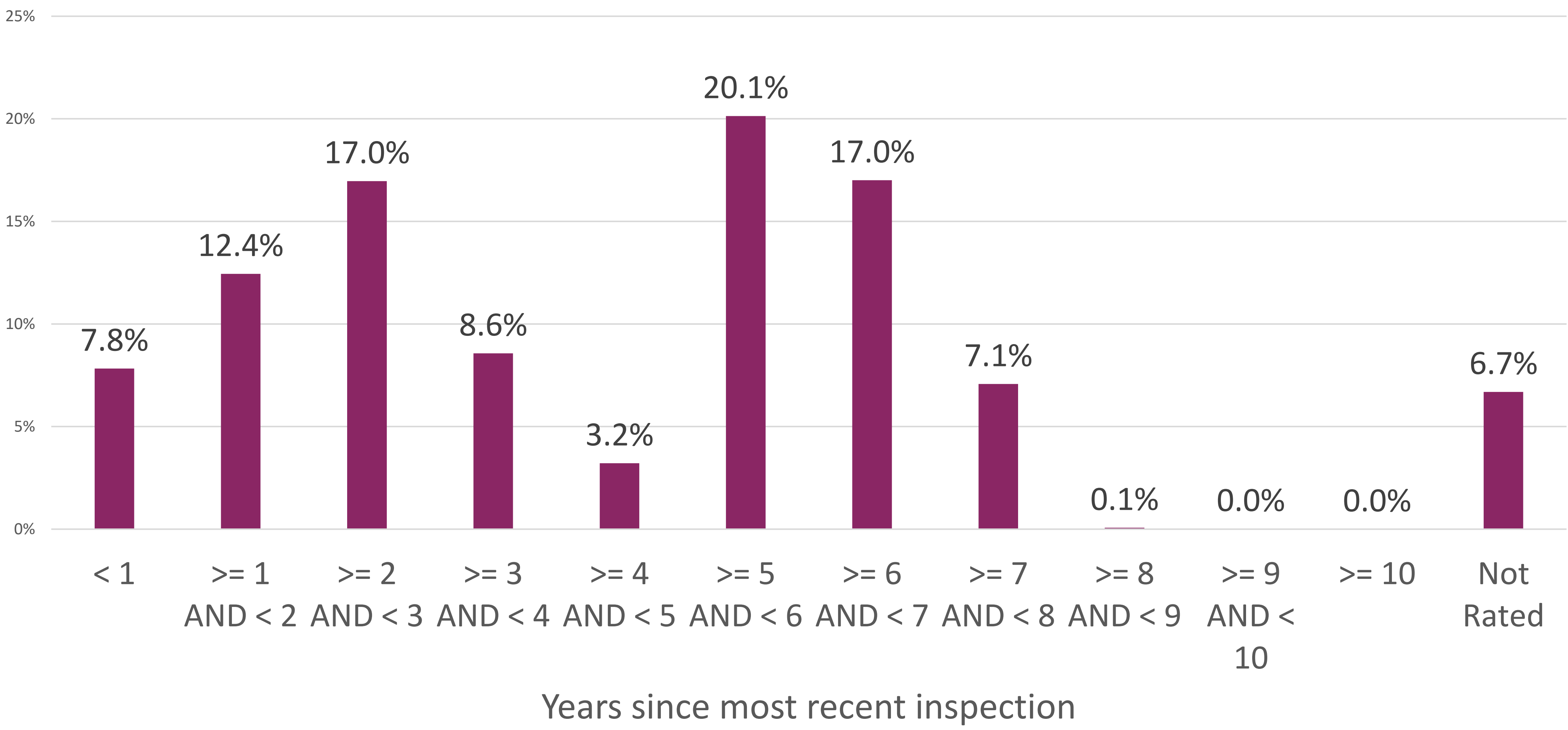
LaingBuisson
INTELLIGENCE + INSIGHT

Projection of supported living market growth (real terms)



Is the Regulator up to it?

Years since latest CQC inspection, Care homes in England



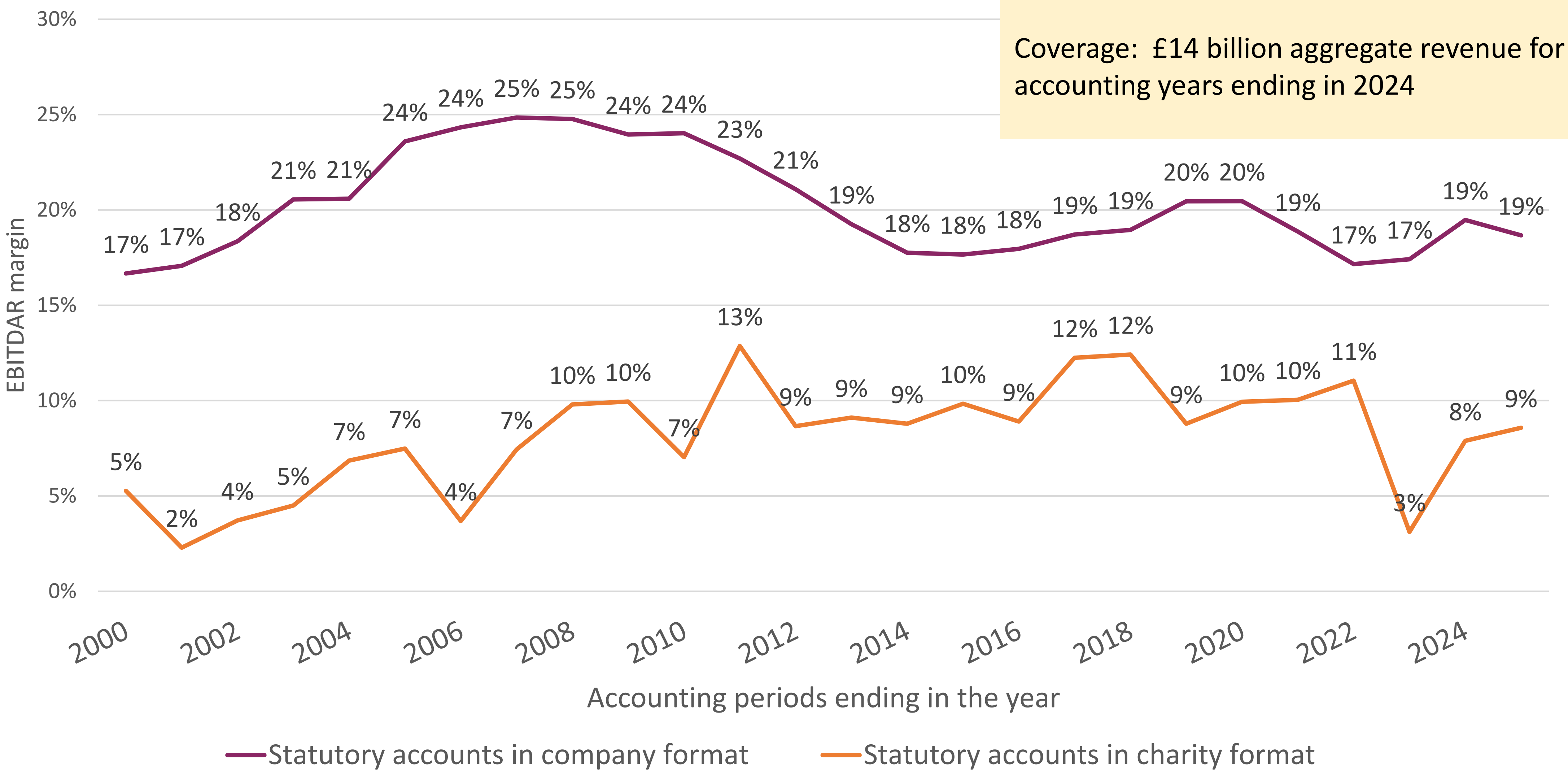
What is an adequate / reasonable level of

PROFITABILITY ?

Aggregate EBITDAR margin, care home groups for OLDER PEOPLE

(130 groups posting profit & loss at Companies House at some time in the period)

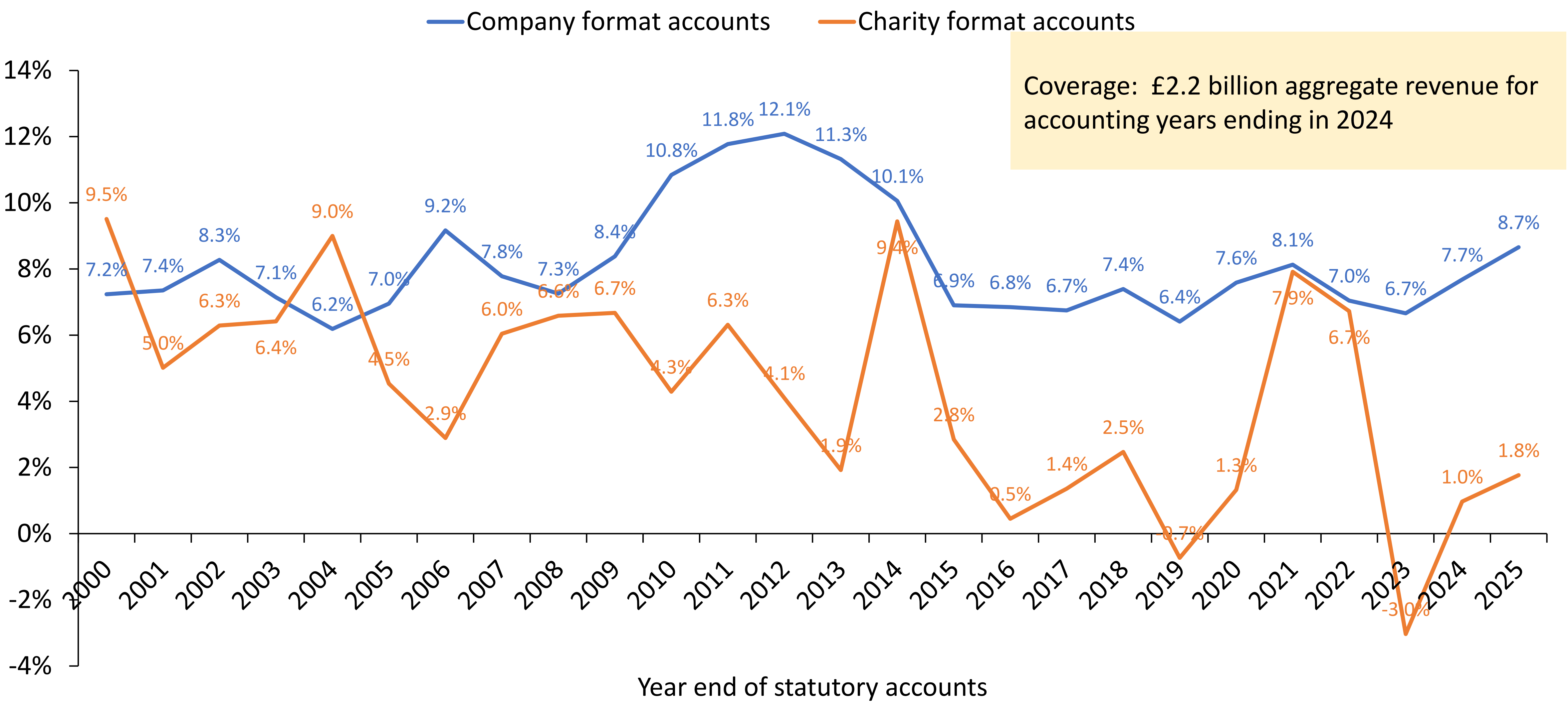
Coverage: £14 billion aggregate revenue for accounting years ending in 2024



LaingBuisson
INTELLIGENCE + INSIGHT

Aggregate EBITDA margin, Homecare Groups

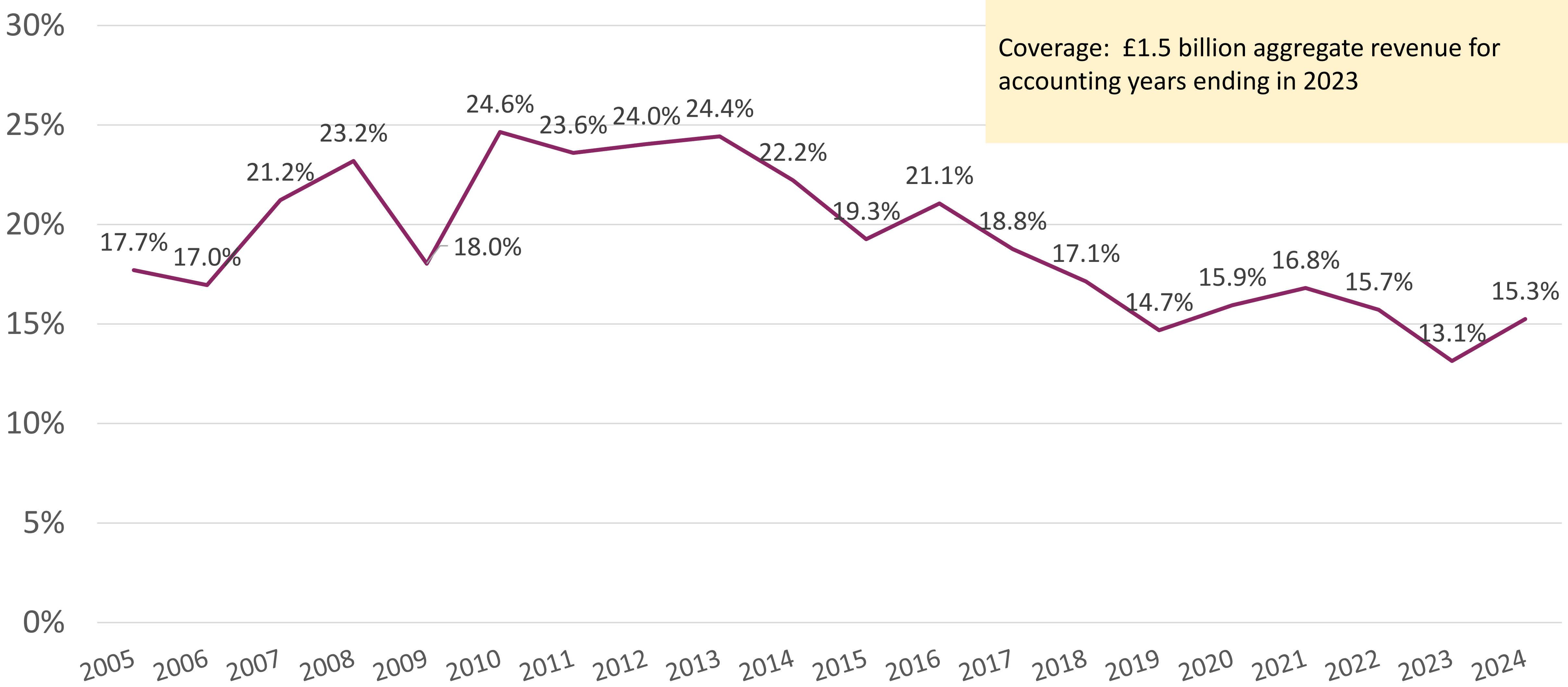
(50 groups posting profit & loss at Companies House at some time in the period)



Aggregate EBITDAR margin, YOUNGER ADULT care home groups

(37 groups posting profit & loss at Companies House)

Coverage: £1.5 billion aggregate revenue for accounting years ending in 2023



LaingBuisson
INTELLIGENCE + INSIGHT