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Qatar Facility Management Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

The Qatar facility management market is expected to register a CAGR of 7.90% during the forecasted period. Qatar needs more facility management because of the government-led construction boom and the growing focus on green buildings.

Key Highlights
In addition to transportation projects, the government aims to rapidly expand tourism, education, and real estate to maintain its competencies under the Qatar National Vision 2030 (QNV 2030). Further, as the 2022 FIFA World Cup deadline approaches, the region is witnessing a rise in construction activities and is upgrading its infrastructure.
According to Qatar's Ministry of Finance, Qatar has a budget of 210.5 billion Qatari riyals (USD 58 billion) to complete the infrastructure projects. It is the most significant budget in the last five fiscal years in the Gulf states and follows a year of heavy spending on infrastructure projects.
According to a Bloomberg report, World Cup-related infrastructure projects are valued at USD 300 billion. In addition to building stadiums specifically to host FIFA World Cup matches, Qatar has been investing in modernizing its infrastructure. The goal is to become more of a transport hub for a significant portion of the globe. Development of airports, upgraded roadways, a more extensive metropolitan network, and emerging cities are the country's top priorities.
The shift in approach toward building energy-use reductions has led to a change in the roles of FM teams. Even though Qatar is ahead of most countries in the region when it comes to green building practices, the opportunities for FM operators are likely to grow even more as more and more developers and organizations in the country adopt green building practices.
Further, Qatar's residential, commercial, industrial, and public infrastructure sectors are the most served. The upcoming sectors include oil and gas companies, banks, large waterfront properties, and sports and healthcare facilities. Furthermore, increased awareness among the buyers in the market is prompting facility management operators to match the pricing accordingly.
In the future, FM operators will likely focus on incorporating technology-based solutions into their everyday operations. By

embracing digital disruption, FM operators can collaborate between asset owners, developers, and service providers. Also, to stop the spread of COVID-19 in the area, the maintenance solutions that were already being used are being used for cleaning and sanitizing tasks like wiping down flat surfaces, touch panel displays, and door handles.

Micro- and macroeconomic factors limit market growth. While volatile oil prices are likely to impact the spending levels of end-users, the shortage of skilled labor and increasing labor costs prevent Facility Management companies from reaching their business goals.

Qatar Facility Management Market Trends

Public/ Infrastructure Sector Accounts for Significant Growth

The government buildings in the country use services such as fire alarms and safety, energy management solutions, CCTV monitoring services, and other integrated facility management services. Local providers, such as Elegancia, aggressively seek clientele across government organizations and subsequent long-term project partnerships.
The PWD sector is expected to roll out 19 infrastructure projects, with Residential Real Estate as a critical focus. These include plans to build hard infrastructure on more than 5,000 plots of land. Eleven other projects that include new healthcare facilities, schools, and highway and road expansions that were started earlier will be completed.
Also, the introduction of freehold property has increased the number of property owners from Western countries that demand high facility management standards. According to Ian Harfield, CEO of CBFM, the Middle Eastern market is more dynamic in comparison to the US, European, and Australian markets. Moreover, service providers must be dynamic and agile to meet the clients' changing needs. Most international companies enter the Qatari market through joint ventures with local companies since retaining a skilled workforce is challenging.
Qatar upholds its transport infrastructure with great connectivity through air, rail, road, and sea, which is a major contributor to the country's sustainable growth. The country continues to invest heavily in exploring areas for enhanced connectivity and upgrading the existing infrastructure. For instance, in the second half of 2021 last year, the spending on major infrastructure projects was QR 15 billion (USD 4 billion), which was 20.8% of the state's budget.

Further, the infrastructure push from the government is focused on providing more opportunities to local construction firms, with small-scale businesses expected to be the principal beneficiaries of nationwide development projects. This trend is expected to help create influential local facility management participants. With the availability of stronger local partners, the market is expected to attract foreign partners to continue to invest in large projects in a post-2022 scenario.

Increasing Emphasis on Green Building Practices

The growing importance of Qatar in the market is due to the high number of certified green buildings. In the Middle East, only the UAE has a higher number of certified green buildings. Qatar has the fifth-highest number of LEED-registered and certified buildings outside the U.S.
Qatar Green Building Council (QGBC), the local regulatory body, has been actively promoting sustainable practices. By organizing Qatar Sustainability Week (QSW), the regulatory body is raising awareness among a wider community (the public and private sectors).
The Global Sustainability Assessment System (GSAS), developed by Qatar, is the world's most comprehensive green building assessment system. It was created after a thorough examination of 40 green building codes available worldwide.The codes

developed strongly focus on sustainable development and environmental stress mitigation.
Sustainable Energy Management Services are still one of the most important services that market vendors offer.The vendors' advisory services include reducing water consumption, carbon emissions, and ensuring compliance with legislation and energy consumption metrics.
The city of Lusail, which epitomizes the government's Vision 2030 sustainable development plan, has a range of features, including water-sensitive landscaping plans and a district cooling system designed to save 65 million tons of CO2 a year.

Qatar Facility Management Market Competitor Analysis

The Facility Management Landscape is highly competitive, with several local and international players active in Qatar, such as Al Faisal Holdings (MMG Qatar), Sodexo Qatar Services, Al-Asmakh Facilities Management, G4S Qatar, and EFS Facilities Services. International FM participants operate in the country through partnerships with local players. With the market expected to broaden and yield more opportunities, more players are expected to enter the market soon. The recent developments in the market are:

In October 2021, Al Asmakh Facilities Management and A to Z Services announced their intention to merge to create one sizeable integrated facility management company in Qatar. The merger will result in the combination of eight individual entities, four of which are from A to Z services, and AL Asmakh Facilities Management will contribute four.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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