

Belgium 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 Belgium Facility Management Market is expected to grow at a CAGR above 3% over the forecast period 2022 to 2027. The country's facility management industry operates with integrated contracts from significant European vendors, and small local players focus on single contracts and single-service solutions. However, given the dynamics occurring across the country, there are increasing opportunities to leverage facility management and corporate real estate in new ways.

Key Highlights

Moreover, facility management (FM) includes management methods and techniques for building management, infrastructure management for an organization, and overall harmonization of the work environment in an organization. This system standardizes services and streamlines processes for an organization.

Furthermore, bundled service contracts are expected to benefit from the public spending cuts, as the public sector clients are keen on reducing the number of suppliers and cutting costs. This is also in line with the developments in various public sector bodies that continually simplify their operations. As the need for total facilities management (TFM) continues to grow, the public sector organizations belonging to the region are increasingly outsourcing all 'non-core business activities to one service provider, enabling greater focus on core business.

For instance, in recent years, Coor Service Management announced that it has started delivering soft FM services to Volvo Cars in Gent, Belgium. The partnership includes responsibility for cleaning, interior fittings (such as carpets and towels), and pest control at the site.

Further, the infrastructure push from the European government is focused on giving more opportunities to local construction firms in the country, with small-scale businesses expected to be principal recipients of nationwide development projects. This will likely help create influential local facility management participants in the future. With the availability of more vital local partners, the market is expected to bring foreign partners to invest in massive projects in a post-2022 scenario.

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However, the public sector in the country has started looking for longer-term contracts from facility management suppliers. Still, the lack of certainty regarding future labor costs and materials makes it riskier to build propositions. This could significantly restrain the players' bidding process for long-term contracts. Also, the outbreak of COVID-19 has had a mixed business impact on facilities management firms. The restrictions on the movement of people resulted in a decline in project work and a decreased level of activity across many customer sites.

Belgium Facility Management Market Trends

Commercial Segment to hold significant share in the market

The commercial entities cover office buildings constructed or occupied by business services, such as corporate offices of IT and communication, manufacturers, and other service providers. Owing to the provision of necessary fitments, interiors, and commercial buildings, decoration, and management have gained significant importance, thereby driving the country's commercial sector market.

The Facility Management market is witnessing multiple partnership activities between the vendors and the commercial entities in Belgium. For instance, in 2020, KPMG Belgium and Planon formed a strategic alliance, a collaboration in the real estate sector and sustainability services. With its Integrated Workspace Management Solution (IWMS), Planon supports corporate real estate managers, facility managers, and service providers in optimizing their business and workplace performance.

The spread of COVID-19 forced the mass closure of workspace and the implementation of work-from-home policies in most industries, especially in the corporate buildings of the IT and telecommunication sector, which negatively affected the market. However, for some businesses, the new normal initially may mean virus-proofing their offices through short-term fixes, new working patterns, and long-term design upgrades that put hygiene at the core of workplace planning. Therefore, this has positively impacted the region's soft services, such as COVID-19 cleaning services.

Moreover, the gaining interest in establishing smart buildings and other IoT technologies is also providing various opportunities for the vendors in the market to introduce IoT-based facility management and accelerate the growth of smart buildings in the country.

Modern offices with long-term tenants remain highly sought-after by investors despite all the discussions surrounding hybrid working. The growing business acumen among industry leaders and diversification of the economy from various industries is expected to increase the demand for facility management services in the country.

Big Data Allows Facility Management Teams to Drive for Efficiency, Sustainability, and Cost Savings

Facility management has been evolving rapidly over the past several years, resulting in widespread changes to the Belgium industry. Facility management is undergoing a paradigm shift in the region as trends related to data, disruption, evolving amenities, and new workplace concepts are gaining traction and becoming more popular.

The trends in the Belgium market are for a progression from single services to bundled services and further toward the integrated facilities management approach. This offers a broad scope of services and longer-term contracts, adding value, driving better quality and economies of scale, and increasing the demand for outsourced services, where specialist expertise is required.

The outsourced FM has been successfully used in various sectors, including the public sector, retail, professional services, healthcare, technology, logistics, manufacturing, and education. The areas that FM services look after vary widely and primarily depend on its type, the size of the company, and the sector in which it operates. This is not a one size fits all approach. Some organizations will only require a single service solution provider, whereas other big organizations will be looking for a bundled services offering or complete facilities management solution.

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Vendors in the region have been providing bundled services to their customers that offer multiple advantages for clients. For example, PTSG, through its bundled services, provides a multi-disciplinary capability for clients. This often gives them a complete specialist services solution, with the following benefits: one single point of contact for all the services, a more focused approach toward the servicing of their assets, keeping the building(s) in first-class operational order, and associated cost savings. By offering a bundled service, the company can ensure compliance with all services provided by PTSG.

Belgium Facility Management Market Competitor Analysis

Belgium's Facility Management market is moderately fragmented, with domestic vendors and new entrants forming a competitive landscape. The major players are increasingly seeking market expansion through various strategic mergers and acquisitions, innovation, and increasing investments in research and development.

October 2021: CBRE IM has announced that it has acquired a 150,000sqm logistics complex in Belgium, representing one of the largest single asset logistics deals for the Belgium market. The firm acquired the warehouse complex in Ghent via a sale-and-leaseback transaction from Heylen Warehouses.

Additional Benefits:

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

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