

## **Chile Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Chile Facility Management Market size is estimated at USD 1.47 billion in 2024, and it is expected to reach USD 1.81 billion by 2029, witnessing a CAGR of 4.30% during the forecast period.

#### Key Highlights

- The government-led construction initiatives in public infrastructure projects and the growing emphasis on green building practices are fuelling the demand for facility management in the country. Also, the rapid growth of the tourism industry is witnessing the increased demand for FM services in the country from the hotels, resorts, and accommodations facilities.
- Furthermore, the steady growth of commercial and industrial development is projected to support market growth, creating the need for both hard and soft services, as well as increased investor activity, cost control initiatives, adoption of sustainable practices, and technological advancements to contribute to the market growth.
- The low awareness of the benefits of integrated facility management is hampering the facility management market's growth. The presence of the local business environment is a significant challenge, leading them to shift from managing facilities from an in-house model to depending on professional firms.
- As part of expansion strategy from different sectors, several companies are expanding their international presence and establishing new offices. For instance, in April 2022, Globant, an IT and Software company, opened its new office in Santiago, with more than 3000 m2. Furthermore, the company planned to have three offices in the country by the end of the year.
- The pandemic also called for a renewed view on hygiene and has highlighted the need for FM services, such as cleaning, disinfecting, and sanitization. The demand for specialized area-based services has increased. Post-pandemic, as restrictions are being eased across the globe, FM players witness a significant rise in demand for professional sanitization and disinfection services from commercial entities.

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## Chile Facility Management Market Trends

### The Growth of the Tourism Industry is Expected to Drive Market

- The growth of the tourism industry is leading to an increased number of hotels, resorts, and accommodations facilities and creating demand for in-house facility management services to maintain infrastructure, ensure safety and security, utility management, and others to improve the guest experience and quality of services. According to The National Statistics Institute of Chile, in July 2022, Chile registered around 571 thousand tourist arrivals to hotel establishments, the highest figure recorded since March 2021, which showed an increase of 40% compared to the same month of the previous year.
- The strong interest from tourists in visiting Chile's capital during 2022 has shown remarkable progress towards regaining the sector growth. The tourism and hospitality sector contributed over 2.6 trillion dollars to the city economy in 2022, representing 1.7% of its total economic output. This represents a growth of 54% compared to 2021, when the contribution reached 1.7 trillion dollars.
- Meanwhile, the Undersecretary of Tourism estimates around 3,483,121 arrivals of foreign tourists will be registered in 2023, reaching the pre-pandemic levels. Such growth prospects of the country's tourism sector are expected to present more opportunities for facility management service providers, creating significant demand.
- Moreover, the government supports encouraging companies engaged in tourism by 2023, and the promotion and development of adventure tourism in Chile by implementing the second phase of AdventurePro by The Adventure Travel Trade Association (ATTA) is likely to support market growth, creating demand for various facility management services in the country.

### The Public/Infrastructure End-user Segment to Witness Significant Growth

- The public/infrastructure end-user segment includes FM applications in federal, state, and local office buildings. It also covers office buildings for administrative work and other such projects. The infrastructure comprises facilities covering water and land transportation.
- Various buildings use services such as fire alarms and safety, energy management solutions, CCTV monitoring services, and other integrated facility management services. Construction projects in multiple sectors are expected to develop rapidly, which is anticipated to create a considerable influx of investments toward infrastructure and public building structures, thereby driving the market's growth.
- The government is actively delivering its infrastructure plan for 2021-2025, including infrastructure projects with a combined value of CAD 19 billion. This infrastructure project includes 53 projects, including hospitals, airports, public buildings, stadiums, highways, orbital roads, and others. Completion of such infrastructure projects by the government is likely to create demand for hard and soft facility management services in the country.
- Moreover, in September 2022, the Chilean government launched a new plan called "Let's Invest in Chile" to stimulate investment in Chile. Under the new plan, the government is making significant strides to improve public investment. Moreover, under this plan, the Chilean government is also looking forward to attracting foreign investment and participation in this program, with the government working hard to encourage public-private partnerships.
- Among other initiatives in the proposed plan, the government aims to promote investment through public-private work. Four public-private working groups will be convened in sectors such as construction, transport, energy, and mining to create a set of measures that would reduce the number of stalled construction projects and create more favorable conditions for forthcoming projects. Such developments would result in high investments in public sector infrastructure in the country, thus creating opportunities for facility management market vendors.

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## Chile Facility Management Industry Overview

The Chile Facility Management Market is moderately consolidated with the presence of several domestic and international players of different sizes. This market is anticipated to encounter several partnerships, mergers, and acquisitions as organizations continue to invest strategically in offsetting the present slowdowns they are experiencing. The clients in this region are employing FM services to increase the ease of their business operations. The market comprises key solutions and service providers, such as CBRE Group, JLL Limited, and ISS Chile.

In October 2022, the global ESG and Sustainability plan, Better Tomorrow 2025, managed by Sodexo, which is aligned with the 17 Sustainable Development Goals of the United Nations, offered integrated food services and facilities management solutions. This approach, which aims to benefit individuals, small communities, and the environment, includes the company's Chilean business. Sodexo has introduced its "Supply Chain Inclusion Program" in Chile. It creates inclusive business models by assisting small and medium-sized businesses before integrating their output into Sodexo's supply chains countrywide.

In June 2022, Pupil, a spatial data company, started its operations in Chile and partnered with Cushman and Wakefield to improve the speed and accuracy of digital measurements and produce digital floor plans, site information drawings, photography, and facility services.

### Additional Benefits:

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

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