

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

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### **Report description:**

The integrated facility management market is valued at USD 110.9 billion in the current year. It is expected to register a CAGR of 6.26% during the forecast period to reach a value of USD 150.23 billion by the next five years.

#### Key Highlights

- An integrated facilities management (IFM) primarily brings all the facility management contracts under a single service. IFM combines complex facilities management and soft FM such as security, cleaning, and waste management. Bringing all these different services together under a single umbrella can result in better customer service, better coordination between FM services, and consolidated costs to bring everything in under budget.
- One of the significant trends driving integrated FM in the country is the increasing demand for cost-effective solutions. With businesses looking for ways to reduce costs, IFM providers offer services that can save money. By combining services such as cleaning, maintenance, security, and other services under one contract, IFM providers can offer economies of scale and reduce overall business costs. The need for operational efficiency is another factor driving integrated FM demand. Firms are looking for ways to streamline operations and improve efficiency, and Integrated FM providers can help by offering integrated solutions that can help companies achieve their goals.
- The mining-related projects are expected to support the rise of integrated facility management services in Italy, as the mining industry requires planning, organizing, and managing the physical resources of a mining operation. For instance, in July 2022, Vulcan Energy Resources announced its partnership with Italy's geothermal energy producer Enel Green Power (EGP) to explore and develop Vulcan's Cesano license near Rome, Italy. By leveraging their respective lithium extraction and geothermal expertise, Vulcan and EGP will explore the potential development of geothermal lithium projects in the area.
- According to the World Bank published data in May 2023 2021, Poland's urban population remained nearly unchanged at around 60.0%. Further, In 2021, the Czech Republic's urban population remained roughly unchanged at about 75.21%. As cities become

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more densely populated and urban areas expand, the need for efficient building maintenance and management increases. Integrated Facility management services include maintenance assistance, user management, and other support services to ensure the smooth operation of buildings and their associated infrastructure. Such a huge rate of urbanization would drive the studied market.

-Furthermore, facilities managers must constantly be aware of energy consumption and seek ways to optimize energy usage and reduce waste. This can be a difficult task without the right tools and expertise and may require the help of energy management consultants. Additionally, facility management teams may face challenges in predicting and mitigating potential risks and disruptions, such as natural disasters, equipment failures, or supply chain disruptions, which can impact the budget and result in unexpected expenses.

-Moreover, the pandemic has also called for a renewed view on hygiene and has highlighted the need for FM services, such as cleaning, disinfecting, and sanitization. Hence, FM is expected to adapt to the new challenges through differentiated services. Likewise, multiple payers have reported increasing their spending on tech. As restrictions are being eased globally, FM players witness a significant rise in demand for professional sanitization and disinfection services from commercial entities, as directed by the various government authorities.

## Integrated Facility Management Market Trends

### Commercial segment is Expected to hold a Significant Share

- The commercial building industry has seen significant investments in various countries, propelling the facility management business. Various investment firms have hired real estate management businesses to handle their real estate investments. According to CBRE Italy, the volume of investments in Italy in 2022 will be Euro11.7 billion (USD 13.806 billion), the second-best outcome ever, owing to a robust post-COVID rebound powered by exceptional Logistics performance and revived interest in Offices.

- The facility management market has also witnessed multiple partnership activities between vendors and commercial entities. For instance, Siemens Energy, which recently spun off from Siemens AG to operate as a separate company, extended its partnership with Societe Parisienne pour l'Industrie Electrique for three years to ensure technical facility management for Siemens office and production space that covers around 385,000 square meters. Moreover, with the partnership, SIPE's are looking into inspecting, maintaining, and repairing ventilation, air conditioning, electrical, heating, sanitary systems, instrumentation, and control technology in buildings. This will enable the company to establish a strong position in the market and expand its customer base in Europe.

- Economic growth, ongoing diversification, and a growing population, especially among high-worth individuals (HNIs), have increased retail sales in various countries. For instance, with the collective effort of the private and government institutions, UAE's retail has seen a massive transformation in the last few years. With thousands of square feet in retail space, destinations like Dubai and Abu Dhabi have utilized their resources to draw visitors worldwide. Dubai is hailed as the queen of "Shopping Malls" and is considered one of the world's most important markets. All these are reliable indicators that it remains a definite destination for most brands looking to enter the region for the first time, which is expected to impact Integrated facility management in the sector positively.

- The commercial sector is gaining momentum in India due to the IT boom and smart city development plans. The country is attracting commercial investments that drive the need for FM services. For instance, in April 2022, TATA Realty and Infrastructure Limited announced a joint venture with Canada Pension Plan Investment Board to develop its commercial office space across India. According to the companies, the joint venture will be seeded with two assets the Intellion Edge Gurgaon, National Capital Region of Delhi (Gross Living Area: 1.8 million sq. ft), and Intellion Park Chennai (Gross Living Area: 4.6 million sq. ft).

- According to the European Public Real Estate Association, as of March 2023, there were significant differences between the size of various listed real estate markets worldwide. North America was home to the largest listed real estate market worth USD 1.3

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trillion. Listed real estate refers to companies quoted on stock exchanges and receiving income from real estate assets. Such a rise in real estate would drive the commercial sector, further creating an opportunity for the studied market to grow.

#### Europe is Expected to Hold Significant Share of the Market

- There are various trends that may propel integrated facility management in the European region. For example, the Internet of Things (IoT) refers to physical equipment and sensors that use the Internet to connect with integrated FM teams. They generate performance data that alerts facility managers to potential problems.
- Integrated facilities management (FM) can monitor and control equipment from any location. FM teams use the Internet of Things (IoT) to deliver real-time insights into their operations. IoT paired with FM software, such as a computerized maintenance management system (CMMS), identifies problems (e.g., uncomfortable office temperatures), automatically prepares and assigns work orders without human intervention, and tracks their execution.
- For instance, the independent European player in various Central and Eastern European regions is SPIE ICS and SPIE Facilities, both subsidiaries of the SPIE group. This unique solution, developed by SPIE ICS as part of their Internet of Things portfolio, is based on the correlation between the risk of contracting COVID-19 and the concentration of CO2 in the air. This will handle everything from data collection to SPIE teams' physical on-site operations management.
- The solution depends on the protected LoRaWAN remote organization foundation, which permits information gathered straightforwardly from inside the structure to be sent in by portable and independent multifunction sensors. SPIE Facilities teams retrieve, analyze, and interpret the data collected by these sensors as part of a series of concrete steps to increase the client's workplace safety.
- The demand for building information modeling (BIM) has recently increased as many international organizations and governments promote BIM in the building life cycle. BIM promises the benefits of efficient information management (IM) in FM. There will be improved quality of life (QOL) in the workplace when embracing BIM in FM that encompasses multiple disciplines to ensure higher functionality of the built environment by integrating places, people, processes, and technology.
- For instance, in February 2023, Studio IN-EX, a Hungary-based firm, and Royal HaskoningDHV will collaborate to expand their building information modeling (BIM) competence center, a global design and construction technique based on information-rich 3D models. IN-EX Studio was an early user of BIM-based design, which has radically revolutionized how buildings are planned, constructed, built, and maintained. BIM enables construction and design teams to operate more effectively and collects data for operations and maintenance.
- The players in the market are acquiring various outsourcing FM service providers to expand their market presence. For instance, in February 2022, B+N Referencia Zrt. took over the company interests of the ISS Group in Slovakia, Romania, the Czech Republic, and Hungary in the spring of 2021. This was followed by acquiring the Slovenian subsidiary of the ISS Group. B+N has 100% ownership in these companies, just like in the new addition. With this recent acquisition, B+N Referencia Zrt.'s highly extensive service portfolio covers the Central European region. It took the company two decades to establish its market-leading position in this highly competitive segment in Hungary.

#### Integrated Facility Management Industry Overview

The global integrated facility management market exhibits moderate consolidation, featuring several key players, including Jones Lang LaSalle, IP, Inc., Sodexo Inc., ISS Facility Service, CBRE Group Inc., and Compass Group PLC. These companies consistently invest in strategic partnerships and service enhancements to expand their market presence. Notable recent developments in the industry include:

In June 2023, BMF Grup, a leading integrated facility management company, forged a strategic alliance with SARMIS Capital, a

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private equity fund specializing in Romania and neighboring regions. This partnership aimed to reinforce BMF Grup's position as a frontrunner in the integrated facility management sector.

In October 2022, JLL introduced an innovative performance optimization program (POP) to enhance its integrated facilities management healthcare solutions. This data-driven approach offers insights into acute care, non-acute care, and ambulatory facilities. It collaborates closely with in-house facilities management teams to measurably enhance the experiences of patients, visitors, and employees. Additionally, it reduces risks and improves financial performance, all achieved without the need for additional outsourcing.

Additional Benefits:

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

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