

Ireland Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Ireland Facility Management Market size is estimated at USD 2.96 billion in the current year. It is expected to reach USD 3.28 billion in five years, registering a CAGR of 2.05% during the forecast period.

Growth is mainly attributable to the country's rapidly developing infrastructure and increasing public awareness. To significantly increase demand for FM services in the country, the growth of the construction sector in the country after the recession and the development of manufacturing sites are analyzed.

Key Highlights

- The facility management sector is interconnected with large contractors around the globe that have contracts in place, and smaller local players are focusing on individual contract solutions and joint services. However, because of the dynamics on the ground, there are growing opportunities to use facility management and company real estate in new ways. Expansion plans provide a unique chance as market vendors resort to providing tailored home, office, and retail maintenance services.
- In addition, foreign investors are attracted to open trade policies that stimulate the construction sector. The construction sector is the backbone of the economy and is projected to grow rapidly over the forecast period. The construction industry strongly contributes to the country's economic growth and development, creating a strong demand for FM services.
- Ireland has a large manufacturing base, with many jobs in the main sectors of pharmaceuticals and chemicals, food and beverages, health products, computers and electronic equipment, and engineering. To maintain a competitive manufacturing base, raise domestic productivity, and support the sustainable employment of quality workers while promoting export-driven growth, Industry 4.0 is necessary to be implemented in full. This Industry 4.0 Plan is a core deliverable of Future Jobs Ireland, the government's new economic strategy to ensure Ireland is well-positioned to flourish in a world economy that is changing quickly.
- Although the outsourced FM has a lot of income potential, more and more services are commoditized in this country. The FM

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service has become a commodity requiring innovative suppliers to maintain margins and growth. Furthermore, contracts are planned to last less time because the end user sector is characterized by high price sensitivity.

-The Irish market for Facility Management had a double effect as regards the impact of COVID-19. The need to provide cleaning services as part of a hygienic protocol for healthcare facilities was identified in the COVID-19 pandemic and resulted in increased demand for soft service management. A new opportunity for growth has emerged due to the dynamics on the demand side, with numerous companies revising their policies and further developing service offering that includes hygiene maintenance and COVID-19 safety provisions.

Ireland Facility Management Market Trends

Growing Construction Sector Drives the Market Growth

- As commercial real estate investments increase, the country's demand for facility maintenance services is expected to rise. With the government's ongoing rolling out of new infrastructure projects, this sector is expected to grow significantly over the next few years.

- The Irish government estimates that in 17 years, there will be an additional 1 million people in Ireland and a population of 5.7 million. The investments needed to ensure prosperity while simultaneously balancing and sustainably addressing these developments are part of Project Ireland 2040. In the first year since its inception, Project Ireland 2040 has improved regional links, supported domestic competitiveness, and increased environmental sustainability. If there is no corresponding infrastructure, growth will be limited.

- A spatial strategy for Ireland to sustain and manage these massive demographic changes is set out in the National Planning Framework NLFM, part of Project Ireland 2040. A support system for the NPM, an infrastructure investment program, is the National Development Plan NDP, which was developed after previous mistakes.

- Further, the growing residential projects are also contributing to the demand for hard and soft services in the country; for instance, in 2022, the residential community projects Belin Woods and Palmerstown residential, worth approximately USD 100 million and USD 98 million, respectively, began with the completion anticipated in two years. As a result, the construction industry is growing in this country.

- Therefore, the growing construction sector in the country is analyzed to boost the demand for ground maintenance, waste management, and others, thereby impacting the facility management market in Ireland.

Soft FM Offering Type Holds Significant Market Share

- Some soft services include cleaning, recycling, security, pest control, handyperson services, grounds maintenance, and waste management. As a result of the increasing complexity of project implementation in different parts of the country, facility managers have considered high-level cleaning services to be a significant growth area for their business.

- Furthermore, the COVID-19 pandemic changed how facilities operate and provide services. The role of the FM service providers may also be played more strategically and for more extended periods because organizations need to consider and adapt their plans carefully. Furthermore, the growth opportunities for incumbent firms that face difficulties such as congestion in mature markets are expected to arise with a continuous increase in commercial real estate. Although the present market penetration remains limited (relatively), the demand is expected to continue to rise, with the impact of factors such as establishing new branch offices and outsourcing soft facility management.

- The country's rising number of real estate activities drives the demand for integrated facilities management services. According to Eurostat, the total revenue generated from Ireland's real estate activities is expected to surpass USD 5.5 billion in two years.

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- The Irish market offers a lucrative business with significant demand for soft FM services. Strategic acquisitions, which contribute to market growth, have occurred in the country. For instance, with the recent Irish business Service Matters Ltd (SML) acquisition, CWS International has emerged as one of the nation's biggest suppliers of workwear, cleanroom, restroom, and floor care rental services; CWS also purchased Specialized Sterile Environments (SSE), an Irish cleanroom industry expert. This business, which employs over 350 people, specializes in providing cleanroom cleaning, decontamination, and hygiene services to the Irish medical technology and pharmaceutical industries. The current acquisition has significantly boosted CWS' market dominance in the Irish hygiene market. Customers have increased by 2,600, and CWS currently has 750 employees in Ireland.

Ireland Facility Management Industry Overview

The Ireland facility management market is highly fragmented, with the presence of major players like CBRE Group Inc, Sodexo Group, Kier Group PLC, Sensori Facilities Management, and Cushman & Wakefield PLC. Players in the market are adopting strategies such as partnerships, innovations, and acquisitions to enhance their service offerings and gain sustainable competitive advantage.

In June 2023, Kier and TerrAffix announced a new partnership to decarbonize roadside vegetation clearance so that is removed from highway projects can be reused on-site to make significant cuts to carbon, where Biochar is created through the process of pyrolysis when organic materials are turned into solid carbon under high temperatures in the presence of little or no oxygen.

In May 2023, CBRE Group Inc. announced lab-specific services, including laboratory design and productivity consulting, lab equipment relocation, calibration maintenance, and repair, primarily for bio-pharma clients. With the recent acquisition of Full Spectrum Group, CBRE has scaled its Lab Services offering to support clients of varying sizes across multiple industries. CBRE's lab services are agile and flexible to service clients of all sizes, geographic areas, and business sectors, providing consistent and rapid response and minimizing costly downtime.

Additional Benefits:

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

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