

MENA Architectural Services - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The MENA architectural services market was valued at USD 8.354 billion in the previous year. It is expected to register a CAGR of 7.61% and reach USD 12.779 billion over the forecast period.

The increasing demand for green buildings drives the architectural services market, as sustainable construction provides important benefits and business opportunities. Moreover, the return on investment can be improved along with the occupancy, thereby achieving savings in operating costs. The demand for conceptual engineering in building construction and fundamental bioclimatic designs is bolstering the market's growth.

Key Highlights

-Architectural planning has witnessed a paradigm shift in the past few years owing to the emergence of computer software. Advancements in digital design tools, computer-controlled fabrication, computer-controlled connectedness, and interconnectedness have brought out a new phase in the design and build process. Due to the fast-paced infrastructural development in various developing countries across the region, there seems to be constant upgradation when it comes to building designs and architectural requirements.

-Moreover, the architectural industry is growing considerably, with an increasing number of new architectural firms entering the market with innovative designs and software, thereby providing better services such as enhancements in urban planning. This is expected to increase the demand for upgraded design technology involving 3D models and high-end designing software. Modern architectural services, including construction teams, real estate agents, and developers, specialize in single and multi-family houses to create spaces that balance modern aesthetics and practical function. Innovative design development and customized services are expected to be key parameters of this market. Countries such as Saudi Arabia and the United Arab Emirates are driving demand owing to increased developments for better infrastructure coupled with the higher disposable income among the

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residents of these countries. In addition, ongoing technological advancements, such as the development of innovative 4D building information management (BIM) software, are expected to generate opportunities for players operating in the architectural services market.

-Building information modeling (BIM) primarily helps the user create an accurate, precise, and geometric virtual model with all the components and structures involved in the building. Thus, it has witnessed increased adoption owing to its various advantages over existing tools, such as paper-based design, modeling, and CAD systems. With many government regulations promoting the use of BIM solutions and many private organizations increasingly deploying efficient modeling systems in various regional markets, the market for architectural services is anticipated to grow during the forecast period. Remarkable digital advancements in recent years, such as VR and AR, are set to play a significant role in building design. More architecture firms are realising the advantages VR (virtual reality) can offer clients by communicating ideas and concepts. The demand for conceptual engineering in building construction and fundamental bioclimatic designs is further augmenting market growth in the region.

-Despite growth in architectural positions over the previous few years, firms have difficulty recruiting people with the requisite abilities, particularly those adept in BIM tools. Such limitations are projected to restrain market expansion during the forecast period.

-The market for architectural services in the MENA region has significant potential in sectors with high development rates, including transportation, smart cities, tourism, sustainability, and cultural preservation. Architectural businesses are well positioned for significant expansion and impact due to the region's dedication to innovation and development as well as the rising need for architectural knowledge. For businesses looking to take advantage of these opportunities, staying on top of technical developments, sustainable lifestyle choices, and cultural preservation methods will be crucial.

MENA Architectural Services Market Trends

Increasing Demand for Green Buildings to Drive the Market

- The growing demand for green building services, which are intended to produce sustainable structures using ecologically responsible procedures and materials, is the fundamental force behind the growth of the architectural industry. Factors that are triggering global green building activity include market demands, the need to create healthier buildings, reduced energy consumption and lower operating costs, environmental regulations, and local competition.

- Green construction materials consume less water, require less maintenance than comparable items, and can improve a building's sustainability and efficiency through lower carbon emissions. Green building materials are used primarily for structural, exterior, and interior applications, and their use is spreading across numerous industries, including in the construction of residential and non-residential structures.

- There are many benefits to green construction. Riyadh is an essential site undergoing a large number of infrastructure developments. The Saudi government and Ministry of Housing's efforts to provide affordable housing units under Vision 2030 are evidenced by schemes launched by ROSHN in Riyadh and Jeddah. The Housing Program focuses on increasing the percentage of Saudi families that own houses to 70% by 2030. Rising business activities in Riyadh are boosting demand for residential units. Some other upcoming mega projects in Saudi Arabia include the King Abdullah Financial District, Kingdom City, and Jazan Economic City, encouraging large-scale investments into construction and fit-out projects in the next decade.

- According to ESCWA, it is expected that the carbon emissions from lighting technology in the Arab building sector will reduce by 8.8 million ton per year by 2030. The construction of green buildings and energy efficiency are considered important by the government and city planners in the region.

- Factors boosting the region's green building activity include the need to create healthier buildings, lower energy consumption and operating costs, environmental regulations, and local competition. The rising focus of individuals on going green is also driving the market. Thus, the increasing demand for green buildings in the region is anticipated to create new architectural service opportunities.

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Saudi Arabia to Hold Major Market Share

- According to a recent Ventures report commissioned by INDEX Saudi Arabia, Saudi Arabia accounts for almost 32% of the total GCC interior design market spending, amounting to USD 3.00 billion. Saudi Arabia is the biggest investor across the Gulf in healthcare and educational property fit-outs, and the residential sector leads the country in interior design and services.
- The healthcare end-use vertical is witnessing the integration of artificial intelligence (AI) into architectural techniques, helping regional vendors find innovative solutions to address the current housing challenge. Architects and engineers leverage AI algorithms to create efficient interior and exterior designs, enhancing building performance. For instance, the NKY company has extensive experience in hospital design, concentrating the interiors around patient-centered care to maximize the needs of the patients. NKY's hospital interior design experience includes Turkey's 370,000m² Mersin Integrated Health Campus.
- In Saudi Arabia, the creation of smart cities is enabled by public, private, and non-profit sector organizations. Saudi Arabia's National Transformation Program (NTP) has made significant progress on the digital front. The National Industrial Development and Logistics Program (NIDLP) focuses on improving industries' competitiveness and efficiency by incorporating Industry 4.0. Digital technologies such as cloud computing, big data, the Internet of Things (IoT), edge computing, AI, robotics, and 3D printing are critical to the region's smart city development.
- Urban planning services in Saudi Arabia are vital for improving the institutional and public landscape, focusing on smart control systems, smart parking, housing, community management systems, and intelligent land and asset management systems. Using sensors helps urban city planners create an accurate and comprehensive picture of pedestrian-vehicle interactions, waste disposal, environmental preservation, infrastructure management, and intelligent disaster management.

MENA Architectural Services Industry Overview

The MENA architectural services market is fragmented due to the presence of large and small players vying for market space. Some of them include DSA Architects Intl, RMJM Inc., AECOM, U+A, HKS Inc., and DSA Architects Intl.

- September 2023: Taraf, the real estate wing of the UAE-based investment holding group Yas Holding, has worked with RMJM to launch the Tranquil and Deluxe Terrazzo Residences project in Jumeirah Village Circle (JVC), one of the most popular communities of Dubai. JVC is a considerably low-density, completely built residential community with parks that provide 360-degree views of lush greenery, F&B venues, schools, and a shopping mall.
- March 2023: Saudi Arabia's NEOM awarded AECOM with a contract for an international airport. The scope of this contract included project management for design, master planning, construction services, commissioning, testing, activation, operational readiness, and transition.

Additional Benefits:

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

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