

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

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Report description:

The Netherlands Facility Management Market size is estimated at USD 7.17 billion in 2024, and is expected to reach USD 7.69 billion by 2029, growing at a CAGR of 1.41% during the forecast period (2024-2029).

However, given the dynamics present in the area, there are growing potential to combine facility management and corporate real estate.

Key Highlights

- In terms of development and expertise, the Netherlands is one of the most important outsourced markets for facility management services. Small local companies concentrate on single contracts and single-service solutions, while the region's facilities management business operates with integrated contracts given by big vendors across continents and boundaries.
- The 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.
- The Facility Management industry, one of the service industries in Europe that positively affected the economic output, is likely to witness the feasible impact of Brexit during the forecast period. As a member of the EU, the FM firms serving in the Netherlands enjoyed all the benefits of specializing in activities with a comparative advantage. Foreign Direct Investment (FDI) inflow, including the free labor movement, supported the country's firms in hiring experts from across the EU.
- To meet the customers' various demands, the market players are developing new services to cater to their needs. For instance, recently, Axalta opened a new refinish facility in the Netherlands. The facility includes the new Dutch Axalta Refinish Academy, an

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innovative body shop environment for training refinishers. It also boasts the recently-launched Daisy Wheel 3.0, which enables fully end-to-end automated color mixing for the first time and works seamlessly with Axalta's Digital Colour Management.

-On the flip side, the market is expected to create a roadblock for itself to update faster on technology as such long-duration contracts with extensions saturate the market thus, impact its growth. When the industry trends indicate to the solution and services providers to use new and emerging technology for facility management, long-term contracts can be counterproductive in the market. Moreover, the growing competition in the market impacts the profit margins and growth of existing vendors. The level of competition between suppliers is so high that FM services are transitioning to commoditized in the region.

-Further, the facility manager's role is growing more notable and even changing from operational to strategic. This COVID-19 pandemic created a opportunity for the facility manager to consolidate the new office environment and the demands of employees in terms of working from home into the corporate culture. Though, more compliance is anticipated, also concerning suppliers. The focus will be more on quality and results and smaller on a fixed schedule.

Netherlands Facility Management Market Trends

Growing Trend of Smart Buildings

- A smart building automates its processes to control its infrastructure, lighting, security systems, heating, ventilation, and air conditioning systems. A smart building uses technology and assimilates it with the basic building infrastructure and other structural and equipment components to make buildings increasingly efficient, safer, sustainable, and to reduce costs. The studied smart building solutions are part of the growing IoT and connected sensor ecosystem.

- Energy use in office buildings focuses on creating a comfortable, healthy, optimal environment for workers; its energy expenditures are mainly on things like ventilation, lighting, and air conditioning. However, a food manufacturing facility's primary energy expenditure is related to its production processes; as a result, its energy needs are primarily focused on things like steam systems, ovens, furnaces, refrigeration units, and more, all of which comprise the largest portion of this sector's energy consumption.

- Demand response, automated building control, autoDR, advanced building and predictive analytics, building optimisation and continuous optimisation, and corporate integration are all required for larger buildings. Smaller buildings, on the other hand, need a system that can offer details on the availability of incentives, historical billing analysis, and recommendations for behavioural, educational, and retrofit changes.

- BEMS is essential to meeting these standards. Businesses are increasingly providing BEMS options for medium-sized structures. They offer energy monitoring, continuous commissioning, retro commissioning, maintenance, trouble ticket management, AMI data analysis, and recommendations for retrofit programmes.

- Furthermore, IoT-enabled emergency lighting solutions are designed to offer total solutions for safe evacuation in case of an emergency or fire for all buildings, from offices to hotels, schools, hospitals, stadiums, and train stations. These solutions drive greater security solutions for intelligent buildings and give a more holistic approach while reducing the total cost of ownership throughout the building life cycle. Solutions such as the MyBuildings portal powered by ABB Ability provide a completely secure area for the management of services, putting greater control back in the hands of the building manager or owner.

- According to American Council for an Energy-Efficient Economy, the Netherlands had the greatest energy efficiency score for buildings in the world in 2022. Meanwhile, France had received 21 points out of a possible 25. This may rise the demand for smart buildings in the region. Smart building facility management refers to the use of data-driven insights and automation technologies to manage and optimize the operation and maintenance of facilities in a smart building

Commercial Segment is Expected to Hold Significant Share in the Market

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- The commercial entities cover office buildings constructed or occupied by business services, such as offices of IT and communication, manufacturers, and other service providers. Due to the provision of necessary fitments, interiors, and commercial buildings, decoration, and management have gained significant importance, driving the country's commercial sector market.
- Commercial spaces require property accounting, renting, contract management, procurement management, and several other services, so hiring professionals becomes necessary. Owing to such factors, the commercial category has further growth opportunities in the market, and the trend is expected to continue over the forecast period.
- Additionally, the commercial sector includes office buildings used by businesses that provide services, including manufacturing, IT and telecommunication, finance and insurance, real estate, and other services. The services are categorized into property, cleaning, security, catering, support, environmental management, etc. Among these, the property category has high demand due to the increased requirement for advertising rental properties and asset management and maintenance services.
- According to the Central Bureau of Statistics (Netherlands), in 2022, Amsterdam had twice as many nonresidential units built as Utrecht. Meanwhile, The Hague had about 100 new commercial buildings that year, and Rotterdam had 72. Such a rise in nonresidential units would create an opportunity for the players in the market to develop new services to expand their market share.
- The market is witnessing multiple strategic acquisitions between the market leaders in these regions. For example, Alstom purchased Shunter, a leading services provider for maintaining rolling stock for freight and passenger transport in the Netherlands. The acquisition reinforces Alstom's position in the Benelux maintenance market by combining both companies' solutions, capabilities, and products to benefit railway operators. It also strengthens Alstom's global maintenance services with a physical presence in the Port of Rotterdam.

Netherlands Facility Management Industry Overview

The Netherlands Facility Management Market is moderately fragmented, with the presence of a major companies like Apleona GmbH, Vebego International BV, Hago Netherlands BV, DW Facility Group BV and many more. The companies continuously invest in strategic partnerships and product developments to gain more market share. Some of the recent developments in the market are:

- August 2022 - Alstom, a global player in smart and sustainable mobility, has agreed to offer full-service maintenance for DB Cargo Belgium and DB Cargo Netherlands' 60 DE-6400 locomotives in Belgium and the Netherlands. Alstom will deliver preventative and corrective maintenance for the contract's first three years, with an option for two additional years. This deal confirms DB Cargo Netherlands' long-standing and trusted cooperation with Alstom (and old Shunter) in Rotterdam over the last 18 years.
- July 2022 - ISS A/S, a workplace experience and facility management company, stated that it had extended its cooperation with Danske Bank for another five years and will continue to deliver comprehensive facility services to the Nordic bank. ISS has been providing services to Danske Bank for many years and became the bank's integrated facilities service partner in 2015. ISS will continue to be the primary service provider for various services, including facilities management, cleaning, technical, food, and support services, as a result of the new extension.

Additional Benefits:

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

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