

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

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### **Report description:**

The United States Facility Management Market size is estimated at USD 267.79 billion in 2024, and is expected to reach USD 370.75 billion by 2029, growing at a CAGR of 6.72% during the forecast period (2024-2029).

To comply with the changing technological age, tools like robot facility monitoring and augmented reality that are integrated with IoT is steadily increasing in the country. More and more software providers are now committed to innovation, making room for AI and robotics in FM.

#### Key Highlights

- Employees in the United States waste significant days per year searching for desks, office rooms and colleagues. This means facilities managers need to rethink how much office space they really need and be more strategic about space management. They also need to invest in technology that supports hybrid collaboration.
- According to US Census Bureau, the value of construction starts in the United States is projected to reach around USD 135 billion in 2022. Current technology of building information modeling (BIM) requires facility management in order to ensure that the information generated during the process of design and construction is also appropriate for the operational needs as well as for asset management. In order to manage the property portfolios and for their optimum operation, there is a software, namely Computer-aided Facilities Management (CAFM). Such initiative is expected to cater the market growth.
- Further, security concerns related to the safety of devices and networks is one of the factors restraining the market growth. Increasing security breaches and growing threats of cybercrime groups are creating skepticism, thus affecting the growth of the market. Payroll, medical records or any other confidential information that will be transmitted to the outsourcing company, presents a risk that the confidentiality may be compromised.
- In context to covid, according to Cleaning & Maintenance Management (CMM) survey, respondents met the challenge of fighting

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a deadly covid virus from spreading in their facilities by purchasing more disinfecting chemicals and equipment in 2020 versus 2019. The largest group of respondents (34%) said they purchased 1-20% more disinfection products compared to 2019 and 28% reported they purchased 21-40% more.

-Most respondents (57%) expected 2020 purchasing levels to remain consistent for 2021 and 24% expected they will purchase even more disinfection items this year. Those purchases include new technology and equipment such as electrostatic sprayers, the top choice by far of new technology that facility managers report they will adopt in the next 12 months.

## United States Facility Management Market Trends

### Healthcare Segment is Expected to Gain Major Growth

- Healthcare has become one of the leading sectors, owing to the increasing number of patients and rising healthcare expenditure by the public, as well as private players in healthcare systems. As per the data published by the Centers for Medicare and Medicaid Services (CMS), in the United States, national healthcare spending is projected to grow at an average rate of 5.5% per year during 2018-2027, to reach nearly USD 6.0 trillion by 2027.

- Thus there has been exceptional growth in the healthcare expenditures that have led to the development of various facilities in hospitals or clinics for the well-being of patients. In United States, there has been a rise in outsourcing of facility management services by the healthcare industry (hospitals, nursing homes, etc.) to third party professional facility management providers. This has augmented the demand for facility management services in the healthcare sector.

- Further, healthcare establishments generate a huge quantity of both hazardous and non-hazardous wastes daily. These hazardous wastes, when inappropriately managed may compromise the quality of patient care. These wastes may enhance environmental pollution and spread infectious diseases. Waste in the U.S. healthcare system is USD 760 billion to USD 935 billion annually, or 25% of total medical spending, according to a new analysis published in JAMA. Thus the healthcare providers are on verge of establishing and implementing programs for the effective management of healthcare wastes, which is likely to impact the growth of the market.

- Medxcel is one of the largest and most trusted provider of healthcare facilities services in the United States. Medxcel delivered USD 80 million in savings in facilities management spend to their customers over the past 4 years. They are being trusted by more than 160 hospitals in the United States.

- Further, the Southcentral Foundation's (SCF) Nuka System of Care served a population of approximately 60,000 mostly low-income and marginalized American Indian and Alaska Native individuals. It was catalyzed by United States legislation that facilitated tribal ownership of services. With this shift came a complete restructuring of services; many of these reforms involved facility organization and management. Teams include a primary care physician, nurse case managers, certified medical assistants, and administrative staff.

- According to the "Population Reference Bureau's Population Bulletin" Aging in the United States the Americans aged 65 and older is projected to reach 95 million by 2060. Majority of elders face mental illness, chronic disease, injury and disability. Thus, there are more elderly people need health care services while the healthcare sector face pressures to provide quality care service, high technology healthcare equipment and cater new type of consumer preferences. The higher is the population of elderly people, the more health-care needs, locations and space are required. Such issue can be handled efficiently with the facility management services, which is expected to grow during the forecast period.

### Commercial Segment to Drive Major Market Demand

- Commercial construction is for the purpose of business through new buildings like offices or a new industrial facility. A service

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provider offers the entire basic infrastructure of the building, which include cleaning of windows, maintenance of lifts, building repair, painting and care of doors, ceilings, and more.

- In the workplace, smart building technology is already helping facilities managers create a more comfortable, energy-efficient environment, manage building systems and assets, and plan for future needs. In the IBM Institute for Business Value 2021 CEO Study, 56% of CEOs emphasize the need to aggressively pursue operational agility and flexibility over the next two to three years. One implication is that as many enterprises return to their offices, the workplace ideally becomes a destination where employees want to gather and collaborate - connecting safely with each other. And then there is already the need to create a return-to-the-workplace strategy.

- Flexible workspaces with sustainable IT infrastructure have significantly grown in the North-Eastern US over the years. The region has the cleanest programs, mechanisms, and policies that enhance the adoption of green technology. The US professional cleaning services is experiencing growth on account of the increased popularity of "green cleaning technology." The use of sustainable washing agents, which include special chemicals, equipment, and techniques, is a major factor contributing to the growth of the market.

- The major responsibility for facilities management in retail involves keeping the store area clean, safe, and attractive. NEST's retail clients said that they have received more foot traffic than they expected during the covid pandemic. NEST manages 60,000 retail locations across the United States and Canada with majority in United States, and providing an integrated solution that pairs financial acumen and business analytics with a consultative approach for both preventative and reactive maintenance.

## United States Facility Management Industry Overview

The United States Facility Management Market is fragmented owing to the major presence of local and global players. The growing demand for facility management services is expected to attract more players, which will intensify the competition in the market during the forecast period. Few of the major players operating in the US facility management market include Compass Group PLC, Sodexo, Inc., CBRE Group, Inc., Ingersoll Rand (Trane), Ecolab, ISS Facilities Services Inc., G4S PLC, Jones Lang LaSalle Incorporated (JLL), EMCOR Group, Inc., Cushman & Wakefield, etc.

- May 2022 - mCloud Technologies Corp. , one of the prominent provider of AI-powered asset management and Environmental, Social, and Governance ("ESG") solutions announced a three-year agreement with a global wind power developer with operations in Europe, delivering the Company's AssetCare solution for wind turbine performance analytics.

- April 2022 - SOS International has been re-awarded a potential 5-year, USD 17.9 million contract by the U.S. Central Command to continue maintaining and managing secure facilities at MacDill Air Force Base and Al-Udeid Airbase in Tampa, Florida, and Doha, Qatar, respectively.

### Additional Benefits:

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

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