

Global Integrated Facility Management Market Assessment, By Type [Hard Services, Soft Services], By Service Outlook [Building and Property Management, Cleaning, Security and Staffing, IT Support, Others], By End-user [Public Infrastructure, Commercial, Industrial, Institutional, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global integrated facility management market is projected to witness a CAGR of 5.70% during the forecast period 2025-2032, growing from USD 110.21 billion in 2024 to USD 171.72 billion in 2032. Integrated facility management is a holistic process of managing and maintaining the organization's actual physical infrastructure and facilities. It is the integration of facilities and services in such a way that the running of a facility or portfolio of facilities will be effective and efficient. This will include activities that concern facility maintenance, space, and workspace management, administrative and financial management, utility management, vendor management, and security services. This is for good use of resources while bringing down costs, ensuring safety for people in the building, and increasing productivity.

In addition, IFM (Integrated Facility Management) is forward-looking with a focus on long-term planning and continuous improvement. It incorporates strategic decision-making according to data-driven insight, periodic evaluation regarding facility conditions, and preventative maintenance programs. The IFM market has gained interest in this period of time, as it reduces risks, reduces chances of downtime, and extends an asset's life by identifying impending issues ahead of time and taking corrective action concerning them. Government is also introducing well-laid regulatory and compliance standards in healthcare, energy, and environmental sustainability. The attainment of these standards requires the expertise that the IFM providers can provide. The ability of the IFM providers in ensuring compliance with regulations is one of the key drivers of their adoption in the region. For instance, in December 2023, Jones Lang LaSalle IP, Inc. was chosen to supply a variety of services for a portfolio of 35 emergency rooms and small-format hospitals totaling more than one million square feet located in Texas, Nevada, Oklahoma,

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Pennsylvania, and Wisconsin. JLL will oversee managing janitorial services, security protocols, and mechanical system maintenance.

Growth of infrastructure and Real Estate Planning around the Globe

The need for integrated facility management (IFM) is greatly increased by the expansion of real estate and infrastructure on a worldwide scale. Growing populations and urbanization demand the effective administration of ever-more complex buildings, including sustainable and high-tech ones. Effective property management, which addresses upkeep, security, and operational efficiency, is becoming more and more important as real estate investments grow. The integrated facility management (IFM) sector is experiencing significant growth through strategic acquisitions aimed at enhancing service offerings and market presence. Companies are investing in comprehensive solutions to meet evolving client demands and capitalize on industry expansion.

For instance, in February 2025, YY Group Holding Limited acquired Property Facility Services Pte. Ltd. (PFS) to strengthen its position in the IFM industry. This strategic move is projected to increase YY Group's revenue by USD 28 million over the next three years, driven by an expanded service portfolio and improved operational efficiencies.

Growing Need for Maximizing Operational Efficiency and Cost-Effectiveness

IFM has grown in popularity in different industries because of this cost-saving feature. IFM outsourcing frees up businesses to invest time and resources in strategic initiatives by outlaying facility-related tasks to experts. Moreover, IFM is an integrated approach to service delivery. This means that the organization does not need to hire different vendors or contractors to perform various services on an as-needed basis but can rely on a single point of contact to handle maintenance, cleaning, and security. High operational efficiency and customer happiness are thus the direct results of an integrated approach; however, it has the additional benefit of strengthening communication and increasing accountability and collaboration. Furthermore, IFM providers draw on their years of experience and industry knowledge in optimizing facility operations and applying best practices. They can achieve better prices and terms by leveraging established ties with suppliers and negotiating bulk contracts. This enables the possibility of negotiating cheaper prices for goods and services, making the approach toward facility management even more cost-effective. The market is seeing growing collaboration between real estate companies and technology companies in an effort to maximize operational efficiency. Organizations are utilizing strategic alliances to maximize workplace efficiency, effectiveness, and cost savings.

For instance, in October 2024, CBRE South Asia Pvt. Ltd. signed a strategic tie-up with NetApp for offering NetApp integrated facilities management for its 1.07 million square feet of office spaces in India. For three years, worth USD 3 million, CBRE will manage NetApp's state-of-the-art campus in Bengaluru and sales offices in Bengaluru, Mumbai, and New Delhi. With this tie-up, CBRE will try to maximize operational efficiency and deliver a high workplace experience for NetApp's employees.

Dominance of Soft Services Segment in Integrated Facility Management

The soft service sector is emerging as a significant player in the Integrated Facility Management (IFM) marketplace, with high-performance workplace experiences and environmentally friendly, sustainable options driving demand. Organizations increasingly develop service offerings through added-value specialties in landscaped, security, and support service offerings in an effort to deliver a high-performance and efficient operational environment. Cost efficiency, legislative compliance, and a desire to preserve a focus on key business operations drive demand for outsourcing soft service shifts. Green cleaning technology, environmentally friendly chemicals, and automation drive service offerings, providing high-performance and environmentally friendly buildings and spaces.

For instance, in January 2025, soft service capabilities have been added in ENGIE Solutions Middle East(ENGIE Group) through a collaboration with Johannes KIEHL KG, a global specialist in cleaning solutions. With such a collaboration, EU Ecolabel-tested items become part of the service offering in ENGIE, and environmentally friendly cleaning in commercial buildings, data centres, and in healthcare is facilitated. With this, ENGIE's service and sustainability orientation is accentuated and underpinned by the growing prominence of soft services in the IFM marketplace.

North America Dominates Integrated Facility Management Market Share

North America is exerting its dominance in the integrated facility management market, driven by a strong economic base, advanced infrastructure, easy access, and high acceptance of the technology in the region. Therefore, users are more likely to leverage smart building technologies, data analytics, and automation in facilities, providing opportunities for IFM providers to

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introduce integrated and technologically advanced solutions. For instance, in June 2024, JLL announced its new facility management application, JLL Serves, which is equipped with AI-powered technology from Sclera, a technology solution enterprise. It is easy to use with mobile and web-based interfaces and brings productivity, compliance and intelligent decision-making that cater to the needs of a workspace, building or critical environment.

Future Market Scenario (2025 - 2032F)

- Advanced technologies such as IoT, AI, and Automation are set to revolutionize integrated facility management services, enhancing their efficiency and effectiveness.
- With more emphasis on energy efficiency, green building practices, the demand for integrated facility management will grow.
- Demand for spaces that maximize comfort, air quality, and overall user experience will continue to grow, driven by increasing focus on productivity and health in the workplace.
- Growing demands for sustainability, openness, and excellent customer service will push IFM suppliers to be creative and provide better facility experiences.

Key Players Landscape and Outlook

Continuous innovation characterizes the landscape of the integrated facility management market globally, as companies compete to outperform one another in terms of providing better technology. The market is expected to grow at a significant rate owing to increased demand for cost effective solutions that reduces the burden of businesses with integrated facility management. Integrated facility management companies are concerned with the existing competition and continuous change in the technological environment, which will likely define the industry's future. Collaborations and developing technologies are projected to increase competition in this fast-paced market.

In July 2023, EMCOR Group, Inc. acquired ECM Holding Group, Inc., a Wisconsin-based company that offers energy efficiency retrofit services. The company expects that the deal will strengthen Emcor's energy efficiency specialty services operations and expand its bundled energy conservation and sustainability solutions portfolio.

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