

Thailand Facility Management Market Assessment, By Type [Hard Service, Soft Service], By Mode [Single, Integrated], By Industry Type [Organized, Unorganized], By End-user [Commercial, Residential, Industrial, Public], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Thailand facility management market is projected to witness a CAGR of 7.08% during the forecast period 2025-2032, growing from USD 3.71 billion in 2024 to USD 6.41 billion in 2032. The facility management market in Thailand is growing with the rapid urbanization rate, significant infrastructure development, and increasing demands for integrated management solutions across sectors such as commercial, healthcare, and hospitality. The revival of these industries following the post-pandemic phase has compelled businesses to focus on operations and sustainability. Maintaining clean and safe environments is gaining prominence, and businesses are now focusing on professional facility management services. Soft services, especially cleaning and maintenance, are the most dominant in the market because they are necessary for improving lifestyle and ensuring the overall functionality of facilities. Integrating advanced technologies like IoT and data analytics further transforms service delivery, allowing for more efficient operations and proactive maintenance strategies. With rapid urbanization and smart city initiatives, West and Central Thailand are becoming key economic zones for facility management services. This regional growth attracts local and international investments, fostering a competitive landscape and encouraging innovation and service diversification. As the market continues to evolve, the emphasis on outsourcing facility management functions is expected to rise, positioning facility management as a strategic component in achieving broader business objectives while enhancing service quality and operational effectiveness.

For instance, in June 2024, Jones Lang LaSalle (Thailand) Ltd announced that its comprehensive digital facilities management application, JLL Serve (Serve), was enhanced with AI-driven technology from Sclera, a technology solutions provider. This integration of Sclera's capabilities with JLL's extensive technology ecosystem and proprietary knowledge enables Serve to enhance productivity, ensure compliance, and facilitate intelligent decision-making through a unified, user-friendly mobile and

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web interface, which can be customized to address the dynamic requirements of workplaces, buildings, or critical environments. In December 2024, CBRE (Thailand) Co., Ltd. was awarded the prestigious ISO 41001:2018 Facility Management Certification by BSI Group (The British Standards Institution). This significant milestone marks a key achievement in CBRE Thailand's commitment to excellence in property management, following a rigorous pursuit of certification that began at the start of 2024.

Cleaning and Security Systems Bolster the Demand

Cleaning and security systems are a significant driver of demand in the facility management sector, with heightened awareness of hygiene and safety standards. In the post-pandemic world, organizations focus on cleanliness and security to create a safe environment for employees and visitors. Advanced cleaning technologies, such as automated cleaning robots, improve efficiency and effectiveness in maintaining facilities. Simultaneously, advanced security systems, such as surveillance cameras and access control technologies, are integrated into the facility, offering strong protection against potential threats. These advancements increase operational efficiency and enhance tenant satisfaction and trust. As businesses continue to realize the value of these services, the demand for comprehensive cleaning and security solutions continues to grow, influencing the future of facility management strategies.

For instance, In April 2024, IFS Facility Services Co., Ltd. entered a joint venture with SoftBank Robotics Singapore, the Asia-Pacific arm of SoftBank Robotics Group, forming SmartBX Robotics Co, which will provide robotic cleaning solutions featuring Whiz I, an artificial intelligence-powered robot vacuum cleaner, and sweeper. Soft services experience strong demand in commercial and healthcare sectors since maintaining high levels of operational standards is crucial to these industries.

For instance, in September 2023, SET-listed aviation technology company SKY ICT Public Company Limited acquired a 100% stake in Siam Administrative Management and Security Guards Co (SAMCO), a Thai security service. Their combined capabilities will provide comprehensive facility management and smart security technology services.

Technological Development Drives Market Demand

Technological development is the major driver for demand in the facility management sector, completely transforming operational practices. Advanced technologies integrated into the system, including IoT, AI, and data analytics, allow facility managers to optimize performance and efficiency. Smart building systems use real-time data for monitoring and control, improving people's lifestyles. In addition, predictive maintenance using AI provides proactive interventions to reduce downtime and extend building and infrastructure life. As the focus on sustainability and operational excellence gains importance for basic facilities in organizations, smart facility management will be necessary to cater to the demand for facility management that aligns with overall business objectives and supports better service delivery.

For instance, in June 2023, Metthier Co., Ltd announced the official launch as Thailand's first smart facility management service provider. The launch aims to elevate property management through the Metthier Intelligent Operation Center (MIOC), 3D Visualization, and Digital Mapping. Metthier offers tailored Standard Operating Procedures (SOP) for each company and seamlessly integrates AI and IoT technologies to monitor and optimize every aspect of property management, including the use of smart robotics.

Hard Services Lead the Market

Hard services lead the market and represent a key portion of the facility management market, emphasizing critical technical and infrastructure-related services such as maintenance, repairs, and capital projects that are needed to make facilities work.

Companies specializing in hard services proactively take a maintenance approach that embodies planned preventative maintenance and reactive solutions such as repair works to address real-time issues. Currently, the market for hard services is highly governed by the development of technology, which supports better service delivery and efficiency. As businesses realize the importance of reliable infrastructure, hard services dominate the market, providing basic support for diverse operations.

For instance, in September 2024, KJTS Group Berhad (KJTS) announced that KJTS's subsidiary, KJTN Engineering Co., Ltd. ("KJTN Engineering") signed an agreement with Central Plaza Hotel Public Company Limited for the retrofit works, provision of operation and maintenance services for the chiller plant, at Centara Grand Mirage Beach Resort Pattaya for 20 years. This partnership underscores KJTN Engineering's expertise and commitment to delivering innovative and eco-friendly solutions in the building support services industry.

West and Central Thailand Dominate the Market

West and Central Thailand are dominating regions in terms of demand in the country's facility management market, driven by

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urbanization and investments in infrastructure. The commercial office and healthcare buildings in the region are deteriorating, which drives up demand for facility management services. In the central business district of Bangkok, local end-users increasingly recognize the value of integrated facility management solutions. The major multinationals are still investing in the region, which has improved service provision and technology adoption. This competitive environment makes West and Central Thailand an important location for facility management as it caters to various sectors while adapting to clients' evolving needs and preferences. The real estate companies are appointing maintenance services companies to manage their buildings. For instance, in March 2023, One Bangkok Co., Ltd. announced the appointment of Jones Lang LaSalle (Thailand) Ltd as the district-wide property manager for One Bangkok, the largest holistically integrated district in the heart of Bangkok. JLL will provide a complete package of property management for office, retail, residential, and overall district common areas. The technology layer at One Bangkok will capture operational data of equipment and facilities through many sensors and systems. With centralized data storage, the property management team will be able to identify trends and anomalies, allowing continuous monitoring and fine-tuning of building services to increase efficiency, security, and transparency in operation and maintenance, as well as reduce costs and save energy.

Future Market Scenario (2025-2032F)

□□The Thailand facility management market is expected to see significant growth driven by the adoption of advanced technologies like IoT and AI. These innovations will enhance operational efficiency, enabling real-time monitoring and predictive maintenance across various facilities.

□□A growing emphasis on sustainability will shape future market dynamics, with businesses prioritizing eco-friendly practices. Regulatory changes aimed at achieving net-zero emissions will further propel the demand for sustainable facility management services.

□□The shift towards integrated facility management services will continue, as organizations seek to streamline operations and reduce costs. This trend will encourage the bundling of services under single contracts, enhancing efficiency and accountability.

□□As companies increasingly recognize the benefits of outsourcing facility management, demand for external service providers will grow. This trend is expected to drive market expansion, particularly among large enterprises looking to optimize operational processes and focus on core business activities.

Key Players Landscape and Outlook

The competitive landscape of the Thailand facility management market is characterized by fragmentation and a mix of established multinational companies and emerging local players. Major participants, such as IFS Facility Service Co., Ltd., CBRE (Thailand) Co., Ltd., and G4S Security Services (Thailand) Limited, are focusing on integrated solutions to differentiate themselves in a market where pricing remains a critical factor. The increasing acceptance of outsourcing, particularly in commercial and healthcare sectors, is driving demand, while technological advancements like automation and data analytics are becoming essential for enhancing service delivery. However, challenges such as limited labor supply and regulatory hurdles persist. Service providers are encouraged to build strong client relationships through real-time analytics and strategic partnerships to maintain competitiveness as the market evolves.

For instance, in March 2023, IFS Facility Services Co., Ltd, a leading facility solutions provider in Thailand, signed a franchise agreement with Chaktomuk Services, a Cambodian company specializing in pest management. The franchise agreement signing ceremony between IFS and Chaktomuk Services took place on 14 March 2023 at Centara Grand at Central Plaza Ladprao, Bangkok, Thailand. As an innovative technology-driven facility management provider, IFS aims to provide flexible services to clients in Thailand and neighboring countries. This partnership will help expand IFS's reach to international clients.

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