

**Indonesia 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:**

Indonesia facility management market is projected to witness a CAGR of 7.63% during the forecast period 2025-2032, growing from USD 10.76 billion in 2024 to USD 19.38 billion in 2032 due to rapid urbanization, industrial development, and high demand for effective operational solutions. Major cities of Western Indonesia are leading the market growth, including cities such as Jakarta and Surabaya, promoting the facility management market demand in the country. These regions are characterized by a high concentration of commercial and residential properties, necessitating comprehensive facility management services to maintain operational efficiency and safety.

In addition, hard services include maintaining HVAC systems, electrical infrastructure, plumbing, and fire safety which are services are utilized in buildings to ensure the functionality and safety of facilities. Soft services include cleaning, security, landscaping, and waste management required to create a conducive environment for the occupants and enhance people's satisfaction level generally. There is also a growing emphasis on sustainability and energy efficiency within the sector. Facility management companies are adopting innovative technologies to meet these demands, further shaping the landscape of the industry. This evolving market presents opportunities for both local and international players to deliver tailored solutions such as smart facilities, catering, and cleaning businesses that address the unique needs of Indonesian businesses.

In March 2023, following the success of Jakarta's head office, PT. ATALIAN Indonesia is opening a new office featuring an Innovation Space. The branch office relocation and expansion are a response to demands for providing technology and sector-specific FM solutions in the East Java province. As one of the leading facility management providers, the new office signals confidence in the strength of the eastern Indonesian market. The Innovation Space in Surabaya will feature a 24/7 Command Centre and technology hub functions.

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For instance, in December 2024, Aden Group catered to over 1,000 personnel on-site, offering a comprehensive suite of essential Integrated Facilities Management (IFM) services. These services encompass catering, smart facilities, and daily essentials provision, all aimed at fostering a comfortable and homely environment for workers in one of Indonesia's most remote industrial zones covering an area of 4,700 square meters in Morowali, Sulawesi.

#### Growing Demand for Waste Management Drives the Market

The facility management market in Indonesia is growing rapidly due to the growing demand for waste management, owing to increasing urbanization and subsequent generation of waste. As the country faces a significant volume of disposal of waste, there is an increasing requirement for effective and efficient ways of managing the waste. Waste management services include collection, recycling, and sustainable waste disposal, which are essential for the maintenance of environmental standards. Consequently, facility management companies are now embracing waste management services and are integrating these services into their offering, providing an all-encompassing approach to building maintenance: operational efficiency, and environmental responsibility. This is key in supporting Indonesia's sustainable development goals.

For instance, in May 2023, Indonesia's Environment and Forestry Ministry inaugurated its first non-thermal polychlorinated biphenyl (PCB) waste processing machine, donated by the United Nations (UN) and entrusted to PT Prasadha Pamunah Limbah Industri (PPLI), based in Bogor. The operation of the machine was donated through the United Nations Industrial Development Organization (UNIDO). This facility is the first and only one in Indonesia, that adopts the non-combustion destruction method.

#### Technological Advancements Fuel the Market

Technological advancements are driving demand in the waste management industry; the industry involves processes that include collection, processing, and recycling. Artificial intelligence is also revolutionizing recycling processes through automated sorting systems that improve efficiency and accuracy in material separation. IoT-enabled devices provide analytics value, enhancing the understanding of operations and sustainability. On the other hand, solar-powered trash compactors increase capacity while reducing collection frequency, hence emitting fewer gases. These technologies enhance operational performance while making responsible environmental practices in waste management, and thus, technology becomes the backbone of innovation in waste management techniques. Companies are now incorporating AI-powered analytics and cutting-edge video surveillance to improve threat detection by analyzing patterns and identifying anomalies in data, thus preventing potential breaches and providing quality video surveillance.

For instance, in April 2024, PT Schneider Electric Indonesia announced a partnership with IPConfigure to integrate cutting-edge video surveillance solutions into Schneider Electric's EcoStruxure Buildings platform. The combination of Schneider Electric's Access Expert and Security Expert products with IPConfigure's Orchid video management system (VMS) makes a robust security ecosystem, offering a comprehensive and integrated solution for protecting people, assets, and data.

#### Hard Services Dominate the Market

The Indonesia facility management market is growing rapidly, especially in the hard services category, which supports building maintenance through HVAC, plumbing, and electrical systems. This segment is growing owing to the increased construction of modern buildings and requires stringent regulatory compliance requirements. With the sophistication of buildings, the demand for professional maintenance increases for safety from fire and efficient operation. The increasing focus on energy efficiency and sustainability further boosts demand for hard services. The Companies in the facility management market in Indonesia are investing in hard services and providing the same for sophisticated buildings playing a crucial role in supporting infrastructure development and enhancing building performance.

For instance, in May 2024, CIMIC Group Limited company Leighton Asia was selected to fit out a data center in Jakarta for multinational technology corporation. Work involved fitting out the data center with mechanical, electrical, plumbing, fire protection services, and security to support an additional 10 MW IT load.

#### Western Indonesia Leads the Market

Western Indonesia is at the forefront of the facility management market, driven by rapid urbanization and industrial growth. Major cities like Jakarta and Surabaya are experiencing significant demand for facility management services, particularly in sectors such as commercial real estate and manufacturing. The region benefits from the concentration of multinational companies and ongoing infrastructure projects, necessitating comprehensive facility management solutions. The growing focus on sustainability and energy efficiency prompts investments in advanced technologies and practices. The competitive landscape includes both local

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and international players, making service offerings more diversified and driving innovation. There will be growing investment in this strategic location, emerging as the major economic hub and skyscrapers leading to the growing facility management market strengthening and supporting overall economic growth.

For instance, in February 2024, PT Sodexo Sinergi Indonesia inaugurated its Central Kitchen in South Jakarta, aiming to enhance culinary services and event catering while implementing the WasteWatch program to improve waste management and reduce environmental impact.

Future Market Scenario (2025 - 2032F)

- The integration of advanced technologies such as artificial intelligence (AI) and the Internet of Things (IoT) is expected to revolutionize facility management practices, enabling smarter building solutions and data-driven decision-making. This trend will likely enhance service delivery and operational efficiency across various sectors.
- As environmental regulations tighten, there will be a growing demand for sustainable facility management solutions, prompting manufacturers to develop energy-efficient models that align with sustainability goals.
- Continued urbanization will drive the demand for facilities that can facilitate hard and soft services in densely populated areas.
- A rise in demand for retrofitting and modernization for buildings that comply with safety standards and improve energy efficiency will fuel the demand for facilities.

Key Players Landscape and Outlook

The competitive landscape of the Indonesian facility management market is moderately competitive, characterized by the presence of both local and international players. Major companies such as PT Prasada Pamunah Limbah Industri (PPLI), PT Cushman & Wakefield Indonesia, and PT OCS Global Services dominate the market, focusing on delivering integrated solutions tailored to local needs. These firms are increasingly investing in technology and innovation to enhance service delivery and operational efficiency. New entrants and smaller firms are also emerging, often competing for cost-effectiveness and specialized service offerings. This dynamic fosters a competitive environment where companies strive to differentiate themselves through quality of service and customer engagement. The ongoing growth in the construction sector and rising demand for facility management services further intensify competition, compelling providers to adapt quickly to changing market conditions and client expectations.

For instance, in April 2024, OCS Group Holdings Ltd partnered with Diversey to present the □Global Facilities Management Trends in the 2024 Indonesian Market,□ gathering industry experts to discuss emerging trends and reinforce OCS Indonesia's innovative service solutions. In January 2025, the company introduced OCS Indonesia's redefined integrated security solutions, designed to meet the evolving needs of customers. The company's approach brings together advanced security measures, tailored strategies, and seamless integration with facilities management. By focusing on each customer's specific requirements, we deliver solutions that not only protect but also contribute to the smooth operation of their businesses.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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