

France Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The France Facility Management Market size is estimated at USD 73.30 billion in 2025, and is expected to reach USD 82.81 billion by 2030, at a CAGR of greater than 2.47% during the forecast period (2025-2030).

The market is driven by rising government contracts in the cleaning sector, with increasing service contracts being renewed in the retail industry. However, the market has witnessed slow rejuvenation over the last few months and seems promising for the country.

Key Highlights

- France is one of the major FM markets in Europe, after the United Kingdom and Germany. The country's large private and public sector business entities also pave the FM market's growth. The market also provides opportunities for existing suppliers and entrants from other countries to set up FM businesses in France. Further, the situation is changing as FM awareness grows and outsourcing is becoming more commonly accepted. This is expected to provide growth in France's FM market, particularly for integrated facility management (IFM) delivery models.
- Many companies in the field of Facility management services have been integrating digital solutions in their services to increase the efficiency of their services to increase customer satisfaction, which is creating a demand for market adoption. For instance, emerging players, such as Watts, have launched a new facility management app called DIGISCO in the country. This cloud-based solution simplifies and manages the entire test and control of backflow preventers workflow for all Backflow testers in facility management. The app is based on constant attention to customer and service managers' needs.
- Furthermore, in June 2023, Valeo, one of the global leaders in mobility solutions, and Equans, a global leader in the energy, facility management, and services sector, signed a partnership to work together to prepare a safe and low-carbon city of the future. Equans and Valeo would work together to develop various solutions and services to meet the needs of cities, focusing on a

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connected urban space, safer for pedestrians and cyclists, with in particular the Smart Pole, presented at VivaTech on Bouygues stand, optimized operation of data centers and energy storage facilities, development of electric mobility with charging and V2G solutions.

- Moreover, the extensive outsourcing activities done by government entities in the country have led to saturation in the public sector. The public sector companies have focused on maintaining long-term relationships with facility management players through contract extensions.
- The outbreak of COVID-19 had a mixed business impact on facilities management firms. The restrictions on the movement of people resulted in a decline in project work and a decreased level of activity across many customer sites. Significant players in the country, such as CBRE Group, Sodexo Group, and others, were adversely affected due to the pandemic lockdown. In addition, the increasing demand for cleaning services has fuelled soft facility management services. Thus, due to the combination, the pandemic has a mixed impact on market growth.
- The future of work is hybrid, and due to many companies adopting the hybrid model, employees would come into the office at a lesser frequency, and the rest of the time, they would work remotely. Due to this, businesses would not need as much office space because fewer people would be accommodated in a smaller working environment, which is a challenge to the market growth because lesser facility areas would decrease the demand for FM services in the country.

France Facility Management Market Trends

Commercial Buildings to Remain the Largest Market Shareholder

- The commercial entities cover office buildings constructed or occupied by business services, such as corporate 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, thereby driving the country's retail sector market.
- The Facility Management market in France is witnessing multiple partnership activities between the government, vendors, and commercial entities. For instance, in March 2022, Infrastructure developers in Edina asked for a USD 22 million tax break for W. 70th Street and France Avenue, which includes a 24-story luxury complex with office and retail space. This development of commercial projects in the country would increase France's demand for FM services.
- The infrastructure of many projects in the country consists of electrical substations, internal roads with loading and unloading areas, networks for potable water, firefighting systems, irrigation, stormwater, and foul water, and their respective tanks. These have led to the increased demand for fire safety, electrical maintenance, technical support and maintenance, cleaning, HVAC, and other facility management services in the country.
- The data center facilities are increasing in the country, and with an increase in the number of DC areas, it is creating an opportunity for the FM service providers due to the DCs' requirements for FM hard and soft services. For instance, in March 2022, the French company Nation Data Center planned to build a data center in France that would be approximately 3,000 square meters in size.
- Moreover, Eurostat estimates that the revenue generated from the construction of buildings in the country could surpass USD 93.24 Billion by 2025. Thus, it would create significant opportunities for the studied market growth.

Integrated Facility Management is expected to witness the highest growth rate

- There is a paradigm shift in the market as multiple industries are transforming from utilizing a single facility management outsourcing model to an integrated services model that can meet all customers' core needs on a large scale. In addition, with newer technology transforming how organizations work, integrated facility management has become the key to smart buildings

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and work environments in the country.

- It consolidates the organization's office and property-related services and processes under a single contract and management team. It is a one-stop shop for all the FM needs of an organization. A company could forego multiple, confusing vendor contracts favoring just one service agreement. It would also involve placing multiple responsibilities handled individually by different teams under a single umbrella.
- The trends in the French market are for a progression from single services to bundled services and further toward the integrated facilities management approach. It offers a broad scope of services and longer-term contracts, which adds value and drives better quality and economies of scale. Also, this is increasing the demand for outsourced services, where specialist expertise is required.
- Integrated facility services can help companies to become more profitable, more efficient, and more competitive while making them more focused on the core business. Many global companies in the country have been partnering with FM service providers, which is creating a demand for FM services in the country.
- For instance, in December 2022, Sodexo, a French FM service provider, and Tetra Pak, a producer of food processing cum packaging solutions, have extended their 5-year agreement to continue offering global integrated facilities management services. Currently, 65 locations in Europe, including France, have been part of the contract between Sodexo and Tetra Pak. The agreement would cover a wide range of places' needs, including offices, corporate headquarters, and production facilities.

France Facility Management Industry Overview

The France Facility Management Market is consolidated because a few key players have contributed the maximum market share in the country. These major players have adopted various growth strategies, such as mergers and acquisitions, new product launches, expansions, joint ventures, partnerships, and others, to strengthen their positions in this market. The major players in the market are CBRE Group Inc, Cushman & Wakefield, Sodexo Group, VINCI Facilities, and Atalian Group, among others.

- July 2023 - CBRE has been appointed to provide property management services for M&G Real Estate in seven countries in Continental Europe. CBRE will manage 50 of M&G Real Estate's assets, including office, industrial, shopping center, retail, and hotel, totaling over 800,000 square meters, where CBRE will provide property and technical management, together with accounting services.
- December 2022 - Elior Group, a French company specializing in cleaning, sanitation, and soft facility management, and Derichebourg Group signed an MOU in which Elior Group agreed to sell Derichebourg Multiservices in exchange for Derichebourg SA receiving extra Elior Group shares. Elior Group's position in contract catering would be strengthened, and the acquisition of DMS would increase the company's service offerings in France's security, technical facility management, and soft facility management.
- May 2022 - Veolia and Seche Environnement signed a unilateral put agreement in which Seche Environnement agreed to purchase a section of Veolia's industrial water treatment services business in France to provide industrial enterprises with high-value-added services in the area of delegated water cycle management because the contract includes facility management with waste management and maintenance operations.
- February 2022 - ATALIAN renewed its facilities management contract with the Institut Gustave Roussy in France. ATALIAN has been associated with this client for the past five years with its cleaning and related services (bio-cleaning, blanking, distribution of patient meals, etc.).

Additional Benefits:

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

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