

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

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Report description:

The Indonesia Facility Management Market size is estimated at USD 12.77 billion in 2025, and is expected to reach USD 17.33 billion by 2030, at a CAGR of 6.3% during the forecast period (2025-2030).

In Indonesia, the market is witnessing growth primarily due to the rising adoption of facility management. This trend is driven mainly by the need for resilience against disruptions, natural disasters, or unexpected events. Furthermore, there's an increasing demand for eco-friendly facility management services to reduce carbon footprints, bolstering the market's positive outlook.

Key Highlights

- Additionally, the integration of smart building technologies and automation, which offer real-time data and control, further propels facility management's growth in Indonesia. Lastly, businesses are increasingly seeking cost-effective solutions for efficient facility management.
- The rise in the demand for commercial and industrial facilities is expected to drive the market and may create an opportunity for the market players to develop new services that cater to the demands of the clients. For instance, according to Bank Indonesia, Starting in Q1 2020, Indonesia's commercial property demand index has been on the rise, peaking at 103.85 index points in Q2 2023. This surge in demand is largely attributed to a growing number of retailers and an influx of foreign investments in the country. Further, The Commercial Property Supply Index (CPSI) for leased commercial property in the second quarter of 2023 grew 1.63% (yoy), up from 1.05% (yoy) in the first quarter of 2023.
- According to the statement by the government of Indonesia in 2023, in its 2024 budget, Indonesia is allocating IDR 40.6 trillion (USD 0.027 billion) for the construction of its new capital city. The presidential office and a dozen apartment blocks for workers are slated for completion in 2024. 2019 Southeast Asia announced plans to construct a new capital, Nusantara, on Borneo Island to replace the overcrowded and sinking Jakarta. By its projected completion in 2045, the new city is expected to amass a total

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cost of USD 32 billion. To date, the government has already invested IDR 32 trillion (USD 0.021 billion) in foundational infrastructure, which includes a dam and a toll road.

- Awareness of the country's demand for facilities management remains low. The local business environment poses a significant challenge, hindering a transition from in-house facility management to reliance on professional firms. Another challenge many players in the FM service sector highlight is the effort required to onboard new clients. This challenge stems from end users' preference for quicker ROI and a desire for lower upfront investments.
- The growth of Indonesia's GDP plays a pivotal role in the expansion of the facilities management market. As the economy grows, there's a surge in construction activities, infrastructure development, and real estate investments, all fueling the demand for FM services. Furthermore, robust economic performance motivates businesses to outsource non-core operations, such as facilities management. For instance, according to IMF, Indonesia's gross domestic product (GDP) in current prices is projected to rise by a total of USD 719.1 billion (+48.73 %) from 2024 to 2029.

Indonesia Facility Management Market Trends

Hard Facility Management Offering Segment Holds Significant Market Share

- Hard facility management services refer to maintaining and managing a building's physical assets, such as HVAC systems, electrical systems, plumbing systems, and building structures. These services are essential to ensure the facility's smooth operation and maintain a safe and comfortable environment for its occupants.
- The rise in the demand for air conditioners in the country would propel the demand for the market studied. For instance, according to the Japan Refrigeration and Air Conditioning Industry Association, in 2023, the demand for air conditioning devices in Indonesia amounted to 2,693 thousand units. The residential Air conditioning accounts for 2,622 thousand units in 2023.
- The rise of smart buildings and green construction practices in Indonesia has led to the integration of energy-efficient HVAC and electrical systems, spurring demand for specialized FM services to ensure proper installation, maintenance, and monitoring. Additionally, Indonesia's rapid economic growth and infrastructure expansion are boosting the need for reliable electrical and plumbing systems in both urban and rural areas.
- PT Wijaya Karya (Persero) Tbk (WIKA) secured new contracts worth IDR 11.59 trillion (USD 0.77 billion) as of July 2024. The largest contribution to these new contracts came from the Industrial segment, followed by the Infrastructure & Building, Property, and EPCC segments. Several key projects included in the new contracts in July are the construction of the New Jetty 1 at the Integrated Terminal Manggis in Bali, the BMKG InaTEWS (Indonesia Tsunami Early Warning System) Buildings in Jakarta & Bali, among other contracts secured by both the parent company and its subsidiaries.
- PT WIJAYA KARYA (Persero) Tbk (WIKA) pocketed new contracts amounting to IDR 21.44 trillion (USD 0.014 billion) as of September 2023, growing by 12.5% (Y-o-Y) compared to the same period last year of IDR 19.06 trillion (USD 0.013 billion). The key contribution to the acquisition of new contracts came from the infrastructure and buildings segment at 49.6%, followed by the industrial, EPCC, property, and investment segments. Projects included in the list of new contracts in September include the Karangnongko Dam project located between Central Java and East Java, the Gatot Subroto Underpass, North Sumatra, and several other contracts obtained by both parent and subsidiary companies.
- In addition to this, government initiatives, combined with the expansion of industrial zones, are contributing to the increased focus on building sustainability, creating more opportunities for hard FM providers. The market is also benefiting from the growing awareness among businesses and property owners about the long-term cost savings and regulatory compliance offered by proper facility management.
- Overall, the growth of the country's commercial and retail sectors drives demand for hard FM services. The growing need for optimal asset performance, rapidly changing technology, and the outsourcing trend are expected to continue the market's growth in the coming years.

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Industrial End-user Industry Segment Holds Significant Market Share

- The industrial sector covers major applications across manufacturing industries, such as electronics, food and beverage, and automotive. In addition, the mining and oil and gas industries contribute to the industrial sector. The industrial sector has been witnessing an increasing need for facility management services owing to government-anchored projects, low taxes, and business-friendly regulations favoring automation and the manufacturing sector's advancements.
- In May 2024, CIMIC Group company Leighton Asia was selected to fit out a data center in Jakarta, Indonesia. The project was for an existing client, a multinational technology corporation, and is located within a data center campus. Leighton, Asia, successfully delivered in 2023. Work involved fitting out the data center with mechanical, electrical, plumbing, fire protection services, and security to support an additional 10 MW IT load. In 2023, Leighton Asia delivered site infrastructure for the campus, a data center building with two data halls and associated buildings for storage, security, and other operational facilities, as well as mechanical, electrical, and plumbing services, facade and external works.
- In March 2024, L&T Construction won a rail systems contract worth at least USD 120.7 million to fit out the Jakarta Mass Rapid Transit (MRT) Phase 2A extension project through its Japanese partner, Sojitz Corporation, in Jakarta, Indonesia. The Jakarta MRT Phase 2A represents an extension of the current Jakarta MRT Line, covering the stretch from Bundaran HI to Kota, totaling approximately 12.5 km with seven underground stations.
- This phase entails the procurement and implementation of various systems across multiple domains, following a design and build approach, including comprehensive system integration. The project's scope encompasses Trackworks, Overhead Contact System, Substation System, Power Distribution System, Signaling System & Telecommunication Systems, SCADA Facility, Platform Screen Doors, and modifications to the equipment installed in the existing OCC and stations/train sets from Phase 1.
- The rising industrialization in the country, especially in sectors like electronics and automotive, has led to the establishment of new manufacturing plants, which in turn increases the demand for facility management services to maintain and ensure the smooth operation of these complexes. According to Statistics Indonesia, In 2023, the estimated value of motor vehicle imports to Indonesia amounted to approximately USD 5.18 billion.
- Additionally, as Indonesia continues to push for higher standards in food safety and hygiene, the food and beverage sector has significantly relied on facility management to maintain compliance with health regulations and ensure optimal operational efficiency.

Indonesia Facility Management Industry Overview

The Indonesian facility management market is highly fragmented, with both local and international players having decades of industry experience. The integrated FM vendors are leveraging their expertise by incorporating a powerful competitive strategy. They are spending a large chunk of the amount on advertising.

Furthermore, major vendors in the market are focusing on offering integrated solutions to attract consumers. Smaller and new vendors are expected to focus on maintaining cost-benefit over major vendors, further intensifying the competition in the country. A significant share of the focus will be directed toward the private sector, owing to the public sector reaching a mature stage in the country.

Some of the major market players are PT. SGS Indonesia (Societe Generale de Surveillance SA (SGS SA)), CBRE GROUP INC., Cushman & Wakefield PLC, Jones Lang LaSalle Incorporated, OCS Group Holdings Ltd, among others.

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