

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

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Report description:

The Italy Facility Management Market size is estimated at USD 41.74 billion in 2025, and is expected to reach USD 46.41 billion by 2030, at a CAGR of 2.14% during the forecast period (2025-2030).

The International Facility Management Association (IFMA) defines facility management as combining a physical workplace with an organization's workforce and work, including equipment upkeep, space planning, and portfolio forecasting. These services include leadership and strategy, real estate and property management, project management, quality, human aspects, emergency planning and business continuity, environmental sustainability, and others.

Key Highlights

- Various trends may propel facility management in Italy; for example, the Internet of Things (IoT) refers to physical equipment and sensors that use the Internet to connect with FM teams. They generate performance data that alerts facility managers to potential problems. FMs can monitor and control equipment from any location. FM teams use IoT to deliver real-time insights into their operations. IoT paired with FM software, such as a computerized maintenance management system (CMMS), identifies problems, automatically prepares and assigns work orders without human intervention, and tracks their execution.
- Facility management in smart buildings utilizes data, automation, and new technologies to enable buildings to be run more efficiently and cost-effectively. An intelligent building uses sensors and automation to control all facilities, from lights to space occupancy and energy consumption. With smart technology, robust data can be gathered to give the facilities manager the insights needed to make better business decisions.
- Italy has a diverse commercial real estate market, including retail, office, industrial, and hospitality properties. The Italian market has seen steady growth in recent years, particularly in the office and industrial sectors. Prices for commercial real estate in Italy can vary depending on location and property type, with prime locations typically commanding higher prices. Major Italian

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commercial real estate industry players include CBRE, Savills, and Cushman & Wakefield.

- The Italian facility management services market needs to be more cohesive as significant local players enter the commercial sector. For instance, the market is dominated by regional players such as Elmet Srl, Rekeep SpA, and NAZCA. Local players offer competitive pricing in the market, which reduces the suppliers' bargaining power and gives the buyers an option to switch their facility management vendors with minimal switching costs quickly. Local players with fewer international relationships are leading to lesser adoption of technically advanced FM services, such as robotics used for cleaning practices, which will be a significant threat with a long-term effect.
- The COVID-19 pandemic had a significant economic impact on facility management companies. People's mobility restrictions resulted in declining project work and decreased activity at several customer sites. The pandemic lockdown impacted major industry businesses, including Sodexo Facilities Management Services and CBRE Group.
- The demand for transformation, creative solutions, and unique planning strategies has increased since the pandemic. Since the emphasis has shifted toward higher hygiene-related rules, better workplace safety and cleanliness, and developing a digitized work environment, sourcing and procurement are essential in the facilities management market's post-pandemic transformation and recovery.

Italy Facility Management Market Trends

The In-house Facility Management Segment is Expected to Hold a Significant Market Share

- In-house facility management refers to services provided by a dedicated resource directly employed by the client organization. In this type of facility management monitoring, performance control is usually conducted under the terms of the conventional employee/employer relationship.
- In-house facility management involves recruiting specialized personnel to maintain and manage various functional attributes of a facility or area. Most generic services are generally outsourced to third-party service providers. However, some services, such as security services or cybersecurity assistance, are still operated and monitored in-house to assure the safety and integrity of the facilities.
- Retail and hotel industries have supported in-house staff for non-specialized services to some extent. However, organizations and individuals in underdeveloped countries continue using contractors for specialized tasks like elevator, HVAC, and MEP work.
- Factors including increased consumer spending, economic activity, and tourism activities have augmented the occupancy of large residential layouts/projects, hotels, and commercial spaces. This has, in turn, increased the need for better facility management.
- The country is witnessing increasing construction in the residential sector, which will further boost the demand for in-house facility management services. Before the pandemic, building investments were continuously increasing.
- In Italy, logistics sectors are expanding. They are outsourcing and restructuring supply chains, including strategies that benefit third-party logistics players and boost their space requirements. Increased real estate expansion plans will increase the construction of new facilities for the logistics sector, thereby increasing the demand for facility management.

The Commercial and Retail Segment is Expected to Hold a Significant Market Share

- The commercial and retail segment includes office buildings used by suppliers of business services, such as manufacturers' corporate offices, IT and communication businesses, and other service providers. Retail facilities management refers to making a company's location hygienic, secure, and welcoming while boosting the brand and simplifying things for the clients. Cleaning floors, restrooms, and window displays, assembling eye-catching retail displays, and occasionally completely renovating the

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facility or shop floor constitute the retail facilities management process. These tasks vary based on the client's requirements.

- The country's commercial building industry has seen significant investments, propelling the facility management business.

Various investment firms have hired real estate management businesses to handle their real estate investments.

- According to JLL, office leasing increased in both Rome and Milan. Corporate tenants continue to seek flexibility with novel leases, while workers want freedom in their working lives. In Rome, take-up climbed to around 150,000 sq. m (+5% Y-o-Y). In 2023, the market-wide trend in company consolidations, space reduction, and prime space relocating and an increased focus on 2030 sustainability targets were anticipated.

- The re-opening of physical retail and e-commerce penetration moderated in Europe after the pandemic. For vital European markets such as Italy, e-commerce penetration broadly returned to its pre-pandemic growth trend and is continuing to grow. Occupiers will likely focus on creating a solid omnichannel experience, seamlessly combining the online and brick-and-mortar experience and increasing customer engagement. Thus, retailers are expected to continue investing in physical stores, focusing more on prime locations.

- The growing retail and construction industry, increasing investment in the commercial sector, and increasing smart buildings in the country are expected to drive the demand for facility management during the forecast period. The gradual growth in the commercial and real estate sectors are expected to drive market growth.

Italy Facility Management Industry Overview

The Italian facility management market is fragmented. FM vendors are incorporating a powerful competitive strategy by leveraging their expertise. In addition, they spend a large chunk of their money on advertising. Major vendors in the market, like CBRE Group Inc., ATLAS IFM SRL, Sodexo Facilities Management Services (SODEXO GROUP), Compass Group PLC, Euro & Promos Facility Management, and SPA (EURO & PROMOS), are focusing on offering integrated solutions to attract consumers. Smaller and new vendors in the market are expected to focus on maintaining cost-benefit over major vendors, further intensifying the competition in the country. The focus will also be directed toward the private sector, owing to the public sector reaching a mature stage in the country.

- July 2023: Mitie Defence Limited was awarded a USD 190.57 million contract by the Defence Infrastructure Organisation (DIO) to provide key services for the UK Armed Forces serving in Italy. The contract primarily involves hard facilities management, such as maintenance, repairs, and servicing and soft facilities management, including waste disposal and laundry services, for school and office buildings in Italy.

- March 2023: CBRE announced the launch of a new global service line that advises clients on establishing their electric vehicle charging infrastructure, including EV-charging strategy, identifying charging site locations, planning and installing EV-charging infrastructure, and providing overall program management and ongoing maintenance.

Additional Benefits:

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

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