

## **Saudi Arabia Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Saudi Arabia Facility Management Market size is estimated at USD 31.02 billion in 2025, and is expected to reach USD 55.85 billion by 2030, at a CAGR of 12.48% during the forecast period (2025-2030).

#### Key Highlights

- The International Facility Management Association (IFMA) defines facility management as the integration of a physical workplace with an organization's workforce and operations. This encompasses equipment maintenance, space planning, and portfolio forecasting. Facility management services span leadership and strategy, real estate and property management, project management, quality assurance, human considerations, emergency planning, business continuity, environmental sustainability, and more.
- Saudi Arabia's facility management market is poised for accelerated decarbonization, offering dynamic growth opportunities for industry players. The Kingdom is making significant strides in its clean energy transition, a commitment underscored by the Saudi Green Initiative, which targets net zero emissions by 2060.
- In Saudi Arabia, there's a pronounced shift in facility management services towards eco-friendly and sustainable building practices. This movement is largely driven by government initiatives promoting responsible environmental practices and boosting energy efficiency in building construction and operations.
- Saudi Arabia's facility management market is booming, fueled by a renewed focus on workplace optimization and productivity. This growth aligns with the country's Vision 2030 initiative, which seeks economic diversification and modernization across various sectors. Consequently, there's been a surge in investments in real estate, infrastructure, and corporate environments, driving up the demand for adept facility management services.
- Despite a youthful local population in Saudi Arabia, many aspiring professionals in the facility management industry lack the requisite qualifications and experience. This challenge is magnified by the industry's demand for advanced technical skills.

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Consequently, talent acquisition and retention emerge as significant hurdles in the KSA Facility Management market. As the infrastructure and real estate sectors expand, the need for skilled facility management professionals-ranging from technicians to engineers-grows. Yet, in a competitive job landscape, attracting and retaining this talent proves challenging.

- Post-COVID-19, facility management, and service delivery have undergone transformative shifts. With health and wellness taking center stage in the aftermath of the pandemic, Saudi organizations are turning to professional facilities managers to spearhead these initiatives. This evolution has rendered FM service providers' roles more strategic and long-term, emphasizing hygiene and safety.

- For example, in September 2023, WAYAKIT, a biotech spinout from King Abdullah University of Science and Technology (KAUST), collaborated with Saudi Ground Services (SGS) to roll out sustainable cleaning solutions for the airline sector. This partnership aims to significantly curtail the reliance on hazardous and toxic materials for hygiene maintenance. By aligning with SGS, WAYAKIT reaffirms its commitment to developing eco-friendly products that resonate with the goals of Saudi Vision 2030 and the Saudi Green Initiative.

## Saudi Arabia Facility Management Market Trends

### Manufacturing And Industrial to Witness Major Growth

- Saudi Arabia's manufacturing industry is rapidly expanding, thanks to government anchor projects, favorable low taxes, and regulations that promote automation. As part of its strategy to diversify from an oil-dependent economy, Saudi Arabia is collaborating with Jordan and Egypt to establish a USD 500 billion industrial zone, NEOM, which will be powered by renewable energy. NEOM will emphasize sectors like energy, biotechnology, food, and advanced manufacturing, thereby boosting the demand for facility management services in the nation.

- Numerous projects are now emphasizing advanced control systems and automation in infrastructure. The push towards Industry 4.0 in manufacturing underscores the nation's commitment to adopting cutting-edge technologies, enhancing production quality and output, and further fueling the growth of the facility management market. A case in point: In November 2023, Vedanta Group, via its subsidiary Malco Energy Limited, inaugurated a copper unit in Saudi Arabia, investing SAR 1 million (USD 0.27 million). The new entity, named Vedanta Copper International (VCI) Business Limited, was announced in an exchange filing.

- Saudi Arabia's manufacturing and industrial facility management landscape is marked by resilience, innovation, and adaptability. As the nation forges ahead with its industrial ambitions, the pivotal role of facility management services in ensuring operational efficiency, safety, and sustainability will become increasingly pronounced.

- With the surge in construction activities by oil and gas firms, facility management players see a golden opportunity to expand their services and capture a larger market share. For example, in May 2024, AlSuwaiket Oil & Gas Services Company, a subsidiary of Mubarak A. AlSuwaiket and Sons, is unveiling a state-of-the-art industrial facility at King Salman Energy Park (Spark). Spanning 41,081 square meters, the facility is set to begin operations in Q2 2025, offering services from advanced drilling techniques and eco-friendly waste management to anti-corrosion material production. The facility will also emphasize onshore and offshore pipeline maintenance, incorporate AI solutions, and utilize cutting-edge security technologies.

### Makkah to Witness Major Growth

- The Makkah Region stands as the kingdom's primary global gateway. Home to Islam's holiest city, Makkah boasts a robust infrastructure and connectivity, allowing it to host millions of pilgrims each year. With substantial backing from key initiatives, Makkah's pivotal sectors are witnessing notable growth. The region's transport and logistics, tourism, mining, manufacturing, and automotive sectors not only attract global attention but also exhibit immense potential.

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- Data from the Ministry of Tourism (MoT) in Saudi Arabia reveals that Makkah welcomed 15.4 million international visitors, cementing its status as the premier destination for tourists in Saudi Arabia.
- Moreover, the ongoing infrastructure projects in Makkah underscore the government's commitment to enhancing transportation networks, especially for pilgrims heading to the sacred cities of Makkah and Madinah. With these infrastructure projects gaining traction, there's an escalating demand for management and maintenance services, including cleaning, fire safety systems, and security.
- As the region's tourism thrives, there's a surge in the construction of commercial and hospitality sectors, amplifying the need for facility management services. For example, in July 2024, Alandalus Property Co. unveiled plans for a Makkah project valued at SAR 831 million (USD 222 million) aimed at bolstering the city's commercial infrastructure. Spanning over 50,650 sq. m. in the Makkah Al-Mukarramah region, the new commercial center will boast 350 rental units, including showrooms, retail spaces, hypermarkets, entertainment zones, and dining establishments.
- Additionally, in January 2024, Saudi Arabia's hospitality sector is on the brink of a significant overhaul. Local developers, through a pact between Umm Al-Qura for Development and Construction Co. (the Masar destination owner) and the Kingdom's General Authority of Awqaf, committed SAR 2.5 billion (USD 666.6 million) to Makkah. This collaboration aims to launch a distinctive hospitality project, anticipated to add over 1,000 hotel rooms and suites to the province's accommodation offerings. Such undertakings are projected to spur a substantial demand for facility management services in the foreseeable future.

### Saudi Arabia Facility Management Industry Overview

The Saudi FM market comprises local and international players like the Initial Saudi Group (Alesayi Holding), Almajal G4S (Atlas Ontario LP), Emcor Saudi Company Limited, SETE Energy Saudia for Industrial Projects Ltd (SETE Saudia), ZOMCO (Zamil Operations & Maintenance) (Zamil Group), with significant years of industry experience. FM companies are increasingly integrating technologies into their offerings, thereby enhancing their service portfolios. For example, Enova Facilities Management LLC recently rolled out digital tools for its 'Kinan' project, underscoring its pivotal role in the tech arena.

Additionally, a surge in joint ventures and acquisitions has been observed, driven by the emergence of large-scale projects. This trend underscores the heightened competitive rivalry in the market.

Key factors such as quality certification, diverse service offerings, competitive pricing, and advanced technical capabilities are pivotal in securing new contracts.

Furthermore, the demands of Vision 2030 have spurred intensified competition among FM providers, prompting a shift towards greener solutions and expanded retrofit support services. Given these dynamics, the high intensity of competitive rivalry is anticipated to persist throughout the forecast period.

Additional Benefits:

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

### Table of Contents:

#### 1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

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### 3 EXECUTIVE SUMMARY

#### 4 MARKET INSIGHTS

##### 4.1 Market Overview

##### 4.2 Industry Attractiveness - Porter's Five Forces Analysis

###### 4.2.1 Bargaining Power of Suppliers

###### 4.2.2 Bargaining Power of Consumers

###### 4.2.3 Threat of New Entrants

###### 4.2.4 Threat of Substitutes

###### 4.2.5 Intensity of Competitive Rivalry

##### 4.3 Industry Ecosystem Analysis

##### 4.4 Base Indicator Analysis

###### 4.4.1 Construction Activities in Saudi Arabia

###### 4.4.2 Expansion of Key International FM Services

###### 4.4.3 Commercial Real Estate Sector in the Region

###### 4.4.4 Office Supply Uptake and Occupancy Rates

#### 5 MARKET DYNAMICS

##### 5.1 Market Drivers

###### 5.1.1 Growing Demand For IFM and Outsourcing of Non-core Operations From Emerging Verticals

###### 5.1.2 Emphasis on Green and Sustainable Building Practices

###### 5.1.3 Renewed Emphasis on Workplace Optimization and Productivity

###### 5.1.4 Giga and Megaprojects in KSA Driving the Demand For Fm Services

##### 5.2 Market Challenges

###### 5.2.1 Cost Optimization Problems

###### 5.2.2 Lack of Specialized Talents

###### 5.2.3 Growing Competition Expected to Impact Profit Margins of Existing Vendors

#### 6 MARKET SEGMENTATION

##### 6.1 Service Type

###### 6.1.1 Hard Service

###### 6.1.1.1 Asset Management

###### 6.1.1.2 MEP and HVAC Services

###### 6.1.1.3 Fire Systems and Safety

###### 6.1.1.4 Other Hard FM Services

###### 6.1.2 Soft Service

###### 6.1.2.1 Office Support and Security

###### 6.1.2.2 Cleaning Services

###### 6.1.2.3 Catering Services

###### 6.1.2.4 Other Soft FM Services

##### 6.2 Offering Type

###### 6.2.1 In-House

###### 6.2.2 Outsourced

###### 6.2.2.1 Single FM

###### 6.2.2.2 Bundled FM

###### 6.2.2.3 Integrated FM

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- 6.3 End-user Industry
  - 6.3.1 Commercial, Retail, and Restaurants
  - 6.3.2 Manufacturing And Industrial
  - 6.3.3 Government, Infrastructure, And Public Entities
  - 6.3.4 Institutional
  - 6.3.5 Other End-user Industries
- 6.4 Region
  - 6.4.1 Riyadh
  - 6.4.2 Makkah
  - 6.4.3 Eastern Province

## 7 COMPETITIVE LANDSCAPE

- 7.1 Company Profiles
  - 7.1.1 Initial Saudi Group (Alesayi Holding)
  - 7.1.2 Emcor Saudi Company Limited
  - 7.1.3 Almajal G4S (Allied Universal)
  - 7.1.4 SETE Energy Saudia for Industrial Projects Ltd (SETE Saudia)
  - 7.1.5 ZOMCO (Zamil Operations & Maintenance) (Zamil Group)
  - 7.1.6 SAMAMA Holding Group
  - 7.1.7 Khidmah Sole Proprietorship LLC (Aldar Properties PJSC)
  - 7.1.8 ENGIE Solutions (Engie Group)
  - 7.1.9 Nesma United Industries Co. Ltd
  - 7.1.10 AL-YAMAMA Group
  - 7.1.11 Olive Arabia Co. Ltd
  - 7.1.12 Tamimi Group
  - 7.1.13 Facilities Management Company (FMCO)
  - 7.1.14 Al Suwaidi Holding Company KSA
  - 7.1.15 Enova Facilities Management Services LLC
  - 7.1.16 Saudi Binladin Group - Operation and Maintenance
  - 7.1.17 Musanadah Facilities Management Company (Alturki Holding)
  - 7.1.18 Seder Group
  - 7.1.19 Jash Holding LLC
  - 7.1.20 El Seif Operation and Maintenance (ESOM)

## 8 VENDOR POSITIONING ANALYSIS

## 9 FUTURE OUTLOOK OF THE MARKET

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