

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

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Report description:

The South Africa Facility Management Market size is estimated at USD 11.11 billion in 2025, and is expected to reach USD 13.93 billion by 2030, at a CAGR of 4.62% during the forecast period (2025-2030).

Facilities management helps ensure the functionality, comfort, safety, and efficiency of buildings, grounds, infrastructure, and real estate. The facility management market in South Africa has been experiencing steady growth due to increasing infrastructure development and the need for efficient building management. Technological advancements, sustainability initiatives, and outsourcing trends also contribute to its expansion.

Key Highlights

- In addition, South Africa's population growth, economic dynamism, and rapid urbanization are also expected to generate business opportunities, provided that investments are made to enhance infrastructure and regional connectivity, in line with the Africa Union's Agenda 2063. Further, according to UN DESA, the urbanization rate in Africa was recorded at nearly 44.9% in 2023. Urbanization on the continent has increased steadily over the past two decades, with 35% of the population living in urban areas. This share is expected to increase further by 45.9% in 2025.
- The rising commercial real estate sector in South Africa is anticipated to create a significant demand for professional facility management services. As businesses expand, relocate, or upgrade their facilities, they may seek comprehensive facility management solutions to ensure their properties' efficient operation and maintenance.
- For instance, in November 2023, WeWork South Africa accelerated its expansion plans as the rise in popularity of hybrid work saw a boost in demand for flexible office spaces. In September 2023, Instant Group, a flexible workspace marketplace, acquired property advisor PSA to broaden its reach and grow its business across Africa. Such initiatives in enhancing the commercial sector may create demand for facility management solutions in the country.

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- Furthermore, increasing demand for outsourced facility management, infrastructural developments, and investments in the private sector are some of the key drivers responsible for market growth. Services in the FM industry have been commoditized to a great extent. End users are very price-sensitive, and contracts are, thus, aimed at shorter terms. A real estate over-supply has been creating pressure on rent yields, leading customers to cut costs on FM services.
- Moreover, the South African facility management industry operates with integrated contracts provided by significant global vendors and small local players, focusing on single contracts and single-service solutions. Such diverse capability of meeting various clientele requirements could further drive market growth. The need for more skilled personnel in specific areas of facility management in the country, such as specialized maintenance or sustainability services, could be a potential barrier to market growth.
- The Russia-Ukraine War led to global economic uncertainty, affecting investor confidence and potentially slowing economic growth. This could result in reduced investment in infrastructure projects in South Africa, impacting the demand for facility management services. Geopolitical tensions can lead to fluctuations in currency exchange rates. Depreciation of the South African Rand against significant currencies could increase the cost of imported goods and services, impacting the overall operating expenses of facility management companies.
- In addition, a significant trend in adopting specialized area-based services was recorded instead of the unprecedented demand for computing capacity following a sudden and significant shift to online work due to the COVID-19 pandemic. Domestic vendors observed a rise in specialized cleaning for the booming data center business.

South Africa Facility Management Market Trends

Outsourced FM is Expected to Hold a Significant Market Share

- The outsourced facility management sector in South Africa is supported by integrated contracts from prominent international suppliers and small local businesses that concentrate on single contracts and single-service solutions. The main factors influencing the overall market growth include rising demand for outsourced facility management, infrastructure improvements, and private sector investments.
- The demand for contracts, single, bundled, and integrated FM services is growing in South Africa. The South African government is developing new construction plans to increase demand for outsourced facility management services. According to Statistics South Africa, in 2023, the South African construction sector contributed an added value of approximately ZAR 109.5 billion (roughly USD 5.79 billion) to the nation's gross domestic product (GDP). This represents an increase compared to the previous year when the sector's added value to the country's GDP increased to approximately ZAR 108.9 billion.
- The growing application of facility management in commercial buildings, infrastructure, and industrial projects drives the market's growth. One of the significant factors driving the facility management market is growing construction activity. For instance, South Africa invested heavily in constructing ports, roads, railways, and airports. For large-scale projects, outsourced facility management services are expected to bring new opportunities to the market studied.
- In addition, in May 2024, Dube TradePort Corporation (DTPC) launched the second phase of its industrial precinct and special economic zone (SEZ) adjacent to South Africa's King Shaka International Airport. The ceremony marked the inauguration of Dube TradeZone 2, showcasing two factories currently under construction and worth over ZAR 180 million. As an official release states, Dube TradeZone 2 is anticipated to create around 600 jobs within the next five years, which is expected to fuel market growth.
- Moreover, the recent launch of FM Solutions Technical, a unique, specialized division dedicated to providing technical maintenance services that cater to their client's needs, authorized FM Solutions to increase its range of services. The fundamental strategy is ensuring the service offering is more value-based and aligned to operational efficiency. This strategy is mainly applied in client environments and the company's business for both sides' betterment of the services.
- Organizations today need an efficient, compliant, and cost-effective way to keep their lights on, physical plant humming, and other crucial services being appropriately delivered. These services could also be supported and produced in-house; however,

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many organizations have recognized the benefits of working with an integrated FM service provider that can offer multiple services under a single contract.

- Construction projects in multiple sectors are expected to develop rapidly, which is anticipated to create a considerable influx of investments toward infrastructure and building structures, thereby driving the market's growth. According to the same source, in the third quarter of 2023, approximately 347,000 South Africans in the Gauteng province were working in the construction industry, marking a Y-o-Y change of 14,000 people employed. Furthermore, as more businesses adopt digital technologies into new workplace cultures, there is an increase in the demand for technology-enabled FM solutions, particularly from the banking, financial services, insurance, and healthcare sectors.

Public/Infrastructure Segment is Expected to Hold Significant Market Share

- The public/infrastructure end-user scope covers the FM applications in office buildings at federal, state, and local levels, as well as justice departments, office buildings for administrative work, and other such projects. The infrastructure comprises facilities covering water and land transportation. Various buildings use services such as fire alarms and safety, energy management solutions, CCTV monitoring services, and other integrated facility management services. Local providers, like Johnson Controls, look to clientele across organizations aggressively and subsequent long-term project partnerships.

- Additionally, the country's transport infrastructure is upheld, and it has great connectivity through rail, road, and sea, significantly contributing to the country's sustainable growth. The government invests heavily in exploring areas for enhanced connectivity and upgrading the existing infrastructure. According to the IMF forecast, the country's GDP is expected to surpass USD 468.56 billion by 2028. It indicates a positive economic outlook that can drive further investments in infrastructure, leading to an increased demand for facility management services.

- Furthermore, the government's initiatives to build integrated transportation networks and significant infrastructure projects are anticipated to not only boost the nation's economy in the near term but also open up chances in the FM industry in the medium to long term. As more businesses adopt digital technologies into their new workplace cultures, there is an increase in the need for technology-enabled FM solutions, particularly in the banking, financial services, insurance, and healthcare sectors. Independent organizations like the South African Facilities Management Association (SAFMA) aggressively encourage awareness and extension of the industry to promote future domestic FM development. SANS 1752: Strategic Facilities Management System, which was just released, highlights South Africa as one of the first emerging nations to offer local FM standards to assist enterprises in enhancing FM efficacy.

- Furthermore, the public/infrastructure segment significantly contributes to the market's growth, mainly due to the increasing government's emphasis on infrastructure projects, which exemplifies the expedited approval of 51 key initiatives. These projects, spanning waste and sanitation, energy, and transport, significantly drive the demand for facility management services. The government's comprehensive portfolio of over 93,000 buildings and its strategic shift toward asset preservation rather than costly upgrades further solidify the dominance of the public/infrastructure segment in the South African facility management sector. This underscores the critical role of efficient management in public structures, reinforcing the segment's prominence.

- Addressing the 2024 Sustainable Infrastructure Development Symposium of South Africa (SIDSSA) currently underway at the Century City Conference Centre in Cape Town, according to President Ramaphosa, the symposium is an integral part of the government's effort to close the infrastructure spending gap in the country. Further, it is evaluated that the government needs an additional ZAR 1.6 trillion in public sector infrastructure investment to achieve infrastructure goals and a further ZAR 3.2 trillion from the private sector by 2030.

- The infrastructure segment is one of the prominent segments of the South African facility management market. This is due to the rapid infrastructure development and rising demand from hotels, retail outlets, malls, and office buildings in the country. Moreover, in March 2023, the world's tallest skyscraper built of industrial hemp announced plans to open in South Africa, with 12 stories, a stunning view of the towering Table Mountain in Cape Town, and a small ecological imprint.

- Further, the Boardwalk Mall is a new shopping center within the Boardwalk precinct in Port Elizabeth, South Africa. The new

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shopping mall was developed in two phases with an investment of USD 36.2 million. The mall officially opened in the previous year, marking the completion of the second phase. Such developments boost the country's economy and provide new opportunities for domestic facility management companies.

South Africa Facility Management Industry Overview

The facility management market in South Africa is relatively fragmented due to the presence of local players and small to medium-sized firms. These players are focusing on adopting various growth strategies, such as new product launches, expansions, joint ventures, and partnerships, to strengthen their position in this market. A few prominent players in the market include Matrix Consulting Services, SGS SA, Facilities Management Solutions (Pty) Ltd, Chiefton Facilities Management (Pty) Ltd, and Tsebo Facilities Solutions.

- March 2023: Red Rocket, a South African independent power producer, placed a 373 MW wind turbine contract with the Danish wind turbine manufacturer Vestas. The business will produce 64 of its V150-4.5 MW wind turbines, 12 of its V163-4.5 MW turbines, and five of its V162-6.2 MW Enventus turbines. The Brandvalley, Rietkloof, and Wolf wind parks, located in South Africa's Western and Eastern Capes, hosted the installation of the turbines.
- February 2023: Planon Corporation and Gilbane Building Company announced that they had formed a strategic alliance to help the real estate and facility management market with solutions that leverage Gilbane's multiple years of knowledge in integrated construction and facility management services with Planon's international market-leading technology for smart building and workplace management solutions.

Additional Benefits:

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

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