

## **Hungary Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 127 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

Hungary Facility Management Market Analysis

Hungary facility management market size in 2026 is estimated at USD 1.87 billion, growing from 2025 value of USD 1.78 billion with 2031 projections showing USD 2.36 billion, growing at 4.78% CAGR over 2026-2031. Hungary's position as a Central European manufacturing and business-services hub, the EUR 300 million EU-funded building-renovation wave and rising ESG compliance obligations underpin this expansion. Strong commercial real-estate occupancy, accelerating industrial automation, and large-scale energy-efficiency upgrades are sustaining steady demand for both hard and soft service streams. Multinational corporations continue to outsource facilities work to experienced partners, while local providers leverage proprietary robotics and IoT platforms to defend margins. Currency volatility and an acute skilled-labour shortage remain the main headwinds for the Hungary facility management market.

Hungary Facility Management Market Trends and Insights

Current Occupancy Rates: Re-energising Commercial Demand

Office occupancy surpassed 80% in Budapest's premium assets in 2024, lifting cleaning, security, and MEP workloads for the Hungary facility management market. Hotels recorded a 17% RevPAR rise in February 2025, with occupancy improving 5.6 points, further widening soft-service revenue pools. Self-storage and flexible workspace sites are also filling quickly, broadening the customer base. Higher footfall translates directly into increased demand for compliance-grade indoor-air-quality checks and

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

waste-handling services. Landlords now view professional FM execution as a tenant-retention lever.

#### Profitability of Major FM Players: Technology as a Margin Lever

CBRE raised facilities-management revenue 16% year-on-year in Q1 2025 through IoT analytics and robotics deployment. Hungary's B+N Referencia Zrt. fields 'ROBIN' autonomous cleaners and UVC devices, lowering labour intensity while boosting service consistency. Predictive-maintenance platforms built on IIoT sensors cut unplanned downtime and unnecessary callouts. In automotive campuses, VIPA-controlled building-automation covers 40% of critical systems, underscoring technology's role in margin defence.

#### Value-Chain Analysis: Margin Pressure Driving Vertical Integration

Hungarian FM firms face tighter margins as customers bundle services and benchmark prices more aggressively. Record domestic M and A activity, with 110 deals in 2024 valued at USD 9 billion, shows operators buying niche providers to gain scale efficiencies. Integration outlays and duplicated overhead temper short-run earnings. Consolidation also magnifies compliance spend when merging ESG and cybersecurity protocols across entities.

Other drivers and restraints analyzed in the detailed report include:

Workforce Indicators - Labor Participation: Automation Addressing Skill Gaps  
Urbanization and Population Growth in Major Metros: Smart City Integration  
Buyer Bargaining Power: Cost Vigilance During Currency Fluctuations

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Hard Services recorded a 6.05% forecast CAGR, outpacing the overall Hungary facility management market. Demand stems from MEP upgrades, HVAC retrofits, and asset-performance analytics linked to the EUR 300 million renovation loan. Fire-safety testing gains urgency under tightened ESG disclosure, while geothermal-heat-pump upkeep creates a niche revenue lane. The Hungary facility management market size for Hard Services is projected to widen as factories embed predictive-maintenance regimes. Soft Services still dominate value, holding 61.30% in 2025. Cleaning, security, and office support flourish on the back of 80% office-occupancy levels and a tourism rebound. Robotics-enabled day-cleaning and computer-vision security patrols help offset labour costs, keeping Soft Services competitive within the Hungary facility management market.

Hungary Facility Management Market Segmented by Service Type (Hard Services, Soft Services), Offering Type (In-House, Outsourced, and More), End-User Industry (Commercial, Hospitality, and More), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

#### List of Companies Covered in this Report:

CBRE Group Apleona GmbH ISS Global Jones Lang LaSalle IP Inc. Group Atalian Sodexo Facilities Management Services (Sodexo Group) Compass Group PLC Vinci Facilities Limited (Vinci SA) Future FM Zrt. Leadeck Kft. B+N Referencia Zrt Graphisoft Park SE WING CPI Hungary Frame Group

#### Additional Benefits:

The market estimate (ME) sheet in Excel format

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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**

### **3 EXECUTIVE SUMMARY**

### **4 MARKET LANDSCAPE**

#### **4.1 Market Overview**

##### **4.1.1 Current Occupancy Rates**

##### **4.1.2 Profitability Rates of Major FM Players**

##### **4.1.3 Workforce Indicators - Labor Participation**

##### **4.1.4 Facility Management Market Share (%), by Service Type**

##### **4.1.5 Facility Management Market Share (%), by Hard Services**

##### **4.1.6 Facility Management Market Share (%), by Soft Services**

##### **4.1.7 Urbanization and Population Growth in Major Metros**

##### **4.1.8 Sector Investment Priorities in Hungary's Infrastructure Pipeline**

##### **4.1.9 Regulatory Drivers Specific to Labour and Safety Standards**

#### **4.2 Market Drivers**

##### **4.2.1 Current Occupancy Rates: Re-energising Commercial Demand**

##### **4.2.2 Profitability of Major FM Players: Technology as a Margin Lever**

##### **4.2.3 Workforce Indicators - Labor Participation: Automation Addressing Skill Gaps**

##### **4.2.4 Urbanization and Population Growth in Major Metros: Smart City Integration**

##### **4.2.5 EU-Funded Building Renovation Wave: Technical FM Upsurge**

##### **4.2.6 Corporate ESG Reporting Mandates: Demand for Green FM KPI Services**

#### **4.3 Market Restraints**

##### **4.3.1 Value Chain Analysis: Margin Pressure Driving Vertical Integration**

##### **4.3.2 Buyer Bargaining Power: Cost Vigilance During Currency Fluctuations**

##### **4.3.3 Skilled Labour Shortage: Escalating Wage Costs**

##### **4.3.4 Volatile Utility Prices: Risk to Bundled Energy-Management Contracts**

#### **4.4 Value Chain Analysis**

#### **4.5 PESTEL Analysis**

#### **4.6 Regulatory and Legislative Framework for Market Entrants**

#### **4.7 Impact of Macroeconomic Indicators on FM Demand**

#### **4.8 Porter's Five Forces Analysis**

##### **4.8.1 Bargaining Power of Suppliers**

##### **4.8.2 Bargaining Power of Buyers**

##### **4.8.3 Threat of New Entrants**

##### **4.8.4 Threat of Substitute Services**

##### **4.8.5 Intensity of Competitive Rivalry**

#### **4.9 Investment and Funding Analysis**

### **5 MARKET SIZE AND GROWTH FORECASTS (VALUE)**

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.1 By Service Type
  - 5.1.1 Hard Services
    - 5.1.1.1 Asset Management
    - 5.1.1.2 MEP and HVAC Services
    - 5.1.1.3 Fire Systems and Safety
    - 5.1.1.4 Other Hard FM Services
  - 5.1.2 Soft Services
    - 5.1.2.1 Office Support and Security
    - 5.1.2.2 Cleaning Services
    - 5.1.2.3 Catering Services
    - 5.1.2.4 Other Soft FM Services
- 5.2 By Offering Type
  - 5.2.1 In-house
  - 5.2.2 Outsourced
  - 5.2.3 Single FM
  - 5.2.4 Bundled FM
  - 5.2.5 Integrated FM
- 5.3 By End-user Industry
  - 5.3.1 Commercial (IT and Telecom, Retail and Warehouses, etc.)
  - 5.3.2 Hospitality (Hotels, Eateries, Large-scale Restaurants)
  - 5.3.3 Institutional and Public Infrastructure (Govt, Education, Transportation)
  - 5.3.4 Healthcare (Public and Private Facilities)
  - 5.3.5 Industrial and Process (Manufacturing, Energy, Mining)
  - 5.3.6 Other End-user Industries (Multi-housing, Entertainment, Sports and Leisure)

## 6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves and Partnerships
- 6.3 Market Share Analysis
- 6.4 Company Profiles\* (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
  - 6.4.1 CBRE Group
  - 6.4.2 Apleona GmbH
  - 6.4.3 ISS Global
  - 6.4.4 Jones Lang LaSalle IP Inc. Group
  - 6.4.5 Atalian
  - 6.4.6 Sodexo Facilities Management Services (Sodexo Group)
  - 6.4.7 Compass Group PLC
  - 6.4.8 Vinci Facilities Limited (Vinci SA)
  - 6.4.9 Future FM Zrt.
  - 6.4.10 Leadec Kft.
  - 6.4.11 B+N Referencia Zrt
  - 6.4.12 Graphisoft Park SE
  - 6.4.13 WING
  - 6.4.14 CPI Hungary
  - 6.4.15 Frame Group

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## 7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

### 7.1 White-space and Unmet-Need Assessment

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Hungary Facility Management - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 127 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-20"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)