

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

Market Report | 2026-02-09 | 100 pages | Mordor Intelligence

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### **Report description:**

Saudi Arabia Facility Management Market Analysis

The Saudi Arabia facility management market was valued at USD 30.58 billion in 2025 and estimated to grow from USD 34.59 billion in 2026 to reach USD 64.06 billion by 2031, at a CAGR of 13.12% during the forecast period (2026-2031). Surging capital expenditure on giga-projects, the rollout of Special Economic Zones with 5% corporate tax for two decades, and an increasingly liberalized services sector are together propelling the Saudi Arabia facility management market toward double-digit growth. Large mixed-use developments such as NEOM, Red Sea Global and Qiddiya now insist on integrated contracts that cover hard, soft and sustainability services under single governance structures, a demand pattern that favors providers with scale, digital platforms and ESG credentials. Government privatization of 38 agencies has simultaneously opened core municipal and utility assets to private operators, boosting the pipeline of long-term outsourcing tenders and fueling the Saudi Arabia facility management market's transition from in-house models to specialist providers. At the same time, rising IoT adoption is embedding predictive maintenance and energy analytics into everyday operations, cutting unplanned downtime by up to 70% and lowering lifecycle costs, which in turn strengthens the business case for outsourced, data-driven service agreements. Finally, mandated compliance with the Mostadam rating system and the Green Building Code is pushing ESG from voluntary practice to contractual obligation, anchoring sustainability as a core revenue stream for facility managers.

Saudi Arabia Facility Management Market Trends and Insights

Vision 2030 Infrastructure Expansion

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Mega-projects valued at more than USD 1.1 trillion have re-defined the Saudi Arabia facility management market by replacing ad-hoc maintenance with lifecycle-oriented contracts that blend asset uptime, energy optimization and sustainability reporting. NEOM alone spans 26,500 km<sup>2</sup> and demands single-provider solutions across linear cities, floating industries and luxury resorts. Dussmann Group's joint venture with Ajlan & Bros created more than 4,000 jobs to service these assets and plans to double its workforce, signaling the volume of integrated work coming to market. Outcome-based contracting is becoming common, transferring performance risk to suppliers yet raising revenue visibility. With the Kingdom committed to net-zero emissions by 2060, carbon-reduction metrics are embedded in all new project tender documents, cementing long-term demand for ESG-aligned services.

### Technology Adoption in Building Management

IoT sensors, AI analytics and digital twins are pushing the Saudi Arabia facility management market toward data-centric operations. Field tests show maintenance costs falling 25-30% and breakdowns declining up to 75% after predictive programs are deployed. Saudi Aramco's facilities saved 40% in energy costs once predictive maintenance and automated controls went live, establishing an industrial benchmark. The King Abdullah Financial District runs 100,000 assets through an IBM Maximo platform and achieves 95% occupant satisfaction, proving that enterprise asset management can scale in extreme climates. Smaller domestic providers struggle to reach similar digital maturity, giving international firms a competitive edge. Government initiatives such as the Future Factories Program, which targets 4,000 automated plants by 2027, will widen the customer base for tech-enabled providers and drive further consolidation..

### Skilled-labor Shortages Linked to Saudization

Expanded Saudization targets cover 269 professions, inflating payroll costs and shrinking the technical talent pool that keeps complex MEP systems operational. Healthcare facilities illustrate the pressure: the sector will need 100,000 additional positions by 2030 while maintaining rigorous compliance regimes. Many contractors face salary delays under the financial strain, a factor that tightens working capital and raises execution risk. Larger providers are offsetting the gap by investing in in-house academies; Solutions by stc already reports a 65.5% Saudi workforce after three years of structured upskilling.

Other drivers and restraints analyzed in the detailed report include:

Outsourcing and Service Integration Sustainability and ESG Compliance Contract Stability and Working-Capital Pressure

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

### Segment Analysis

Hard Services controlled 60.68% of the Saudi Arabia facility management market in 2025 as mega-airports, high-speed rail links and new city blocks required constant upkeep of HVAC, power distribution and fire systems. The King Salman International Airport alone commands a USD 7.2 billion package for six runways and anticipates 120 million passengers a year, ensuring long-run demand for MEP monitoring and asset-management platforms. Within this category, Asset Management contracts now integrate predictive analytics to meet uptime targets, mimicking the 100,000-asset IBM Maximo installation at the King Abdullah Financial District. On the flip side, Soft Services are accelerating at a 13.55% CAGR through 2031, mirroring the shift toward hospitality, retail and corporate offices inside Special Economic Zones. Cleaning and security have evolved into regulated disciplines, particularly in healthcare, where Musanadah's ISSA accreditation attests to enhanced infection-control standards.

The Saudi Arabia facility management market size tied to Soft Services is set to expand quickly as SEZ-based multinationals insist

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on global-grade concierge, help-desk and workplace-strategy offerings. Security and lobby services are also scaling because giga-projects attract international events and VIP clientele. Red Sea Global's hospitality program alone will require support for 50 resorts and 8,000 rooms, showcasing the scale of non-technical services coming downstream.

The Saudi Arabia Facility Management Market Report is Segmented by Service Type (Hard Services, and Soft Services), Offering Type (In-House, and Outsourced), End-User Industry (Commercial, Hospitality, Institutional and Public Infrastructure, Healthcare, Industrial and Process, and Other End-User Industries), and Geography. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

SETE Energy Saudia for Industrial Projects Ltd (SETE Saudia) ZOMCO (Zamil Operations and Maintenance) (Zamil Group) Almajal G4S (Allied Universal) Initial Saudi Group (Alesayi Holding) Emcor Saudi Company Limited SAMAMA Holding Group Olive Arabia Co. Ltd AL-YAMAMA Group Khidmah Sole Proprietorship LLC (Aldar Properties PJSC) ENGIE Solutions (Engie Group) Tamimi Group Facilities Management Company (FMCO) Al Suwaidi Holding Company KSA Enova Facilities Management Services LLC Jash Holding LLC

Additional Benefits:

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

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