

Healthcare Facilities Management Market Size, Share, Trends and Forecast by Service Type, Business Model, End User, and Region, 2026-2034

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Abstracts

The global healthcare facilities management market size was valued at USD 437.2 Billion in 2025. Looking forward, IMARC Group estimates the market to reach USD 797.5 Billion by 2034, exhibiting a CAGR of 6.91% during 2026-2034. North America currently dominates the market, holding a significant market share of over 34.4% in 2025. The growing use of artificial intelligence (AI) and data analytics to manage various operations in the healthcare sector, the rising demand for advanced healthcare services, and streamlined procurement processes to enhance service quality are some of the factors propelling the market growth.

The healthcare facilities management market is propelled by the growing demand for efficient management of healthcare infrastructure to ensure hygiene, safety, and operational efficiency. Rising healthcare expenditure and increasing numbers of hospitals, clinics, and diagnostic centers contribute significantly to the healthcare facilities management market growth. Strict regulatory standards for infection control and waste management further boost the need for professional facilities management services. Advancements in technology, such as IoT and automation, enhance operational efficiency while outsourcing non-core services like cleaning, maintenance, and waste disposal allows healthcare providers to focus on patient care. Moreover, the growing focus on green building practices and sustainable solutions in healthcare facilities fuels the adoption of advanced management services globally.

The healthcare facilities management market in the United States is influenced by several factors, including the increasing demand for healthcare services because of an aging population and rising chronic diseases. Stringent healthcare regulations require high cleanliness, safety, and maintenance standards, fueling the need for professional

facilities management services. Incorporating advanced technologies like IoT for predictive maintenance and energy-efficient solutions enhances operational efficiency. Additionally, hospitals and healthcare providers are focusing on improving patient experience and outcomes, driving investments in infrastructure and facility upgrades. For instance, in August 2025, a foremost supplier of language solutions for the healthcare sector, AMN Healthcare Language Services (AMN LS) announced the launch of Strategic Partnership Solutions (SPS), its newest product designed to revolutionize language access initiatives in healthcare institutions by offering organizations comprehensive language services and strategic assistance. Through partnerships with healthcare providers, SPS intends to assume operational duty as an internal language service department for health systems and organizations. Outsourcing non-core services like cleaning, security, and waste management allow healthcare providers to focus on primary care, further expanding the market. Growing sustainability efforts in healthcare buildings also support market growth.

Healthcare Facilities Management Market Trends:

Expansion of Healthcare Infrastructure and Growing Outsourcing Trends

The continuous expansion of healthcare infrastructure, including new hospitals, diagnostic centers, rehabilitation facilities, and long-term care institutions, is a major factor driving the market growth. In July 2025, Hetero Group of Companies Chairman, B Partha Saradhi Reddy, invited the Indian Prime Minister, Narendra Modi, to officially open a non-profit hospital established in honor of his deceased daughter, Krishna Sindhuri. As healthcare networks are growing in size and complexity, managing non-clinical operations is becoming more challenging and cost-intensive. This has led to a strong trend of outsourcing facilities management to specialized service providers who offer expertise in maintenance, security, landscaping, waste management, catering, and technical services. Outsourcing helps healthcare providers reduce administrative burden, control operational expenses, and access professional teams capable of handling large-scale facilities. Additionally, as competition in healthcare is intensifying, institutions are aiming to enhance patient experience by ensuring well-maintained, safe, and comfortable environments. The ongoing expansion of infrastructure and preference for cost-effective outsourcing solutions continue to generate consistent demand for comprehensive facilities management services.

Increasing Emphasis on Infection Control and Hygiene Compliance

The growing awareness about infection prevention and control and stringent hygiene

expectations is significantly boosting the need for healthcare facilities management services. As per the IMARC Group, the global infection control market size reached USD 28.1 Billion in 2024. Hospitals and other medical institutions must maintain extremely high standards of cleanliness, sanitation, waste segregation, and sterilization to minimize healthcare-associated infections. Facilities management providers offer systematic cleaning protocols, specialized disinfection services, and regular environmental monitoring to support these requirements. After global health concerns, institutions increasingly prioritize structured hygiene programs and rely on professional management teams to uphold safe environments. This emphasis extends to air quality control, water safety, and the maintenance of high-risk zones like intensive care units (ICUs) and operation theatres. Consistent adherence to hygiene norms not only ensures patient and staff safety but also helps hospitals maintain accreditation.

Growth of Smart Hospitals and Integration of Digital Technologies

The market is driven by the expansion of smart hospitals and the growing adoption of digital technologies that enhance building operations. In July 2025, Brazil submitted a collaborative proposal to the New Development Bank for the nation's inaugural smart hospital within the Unified Health System. The initiative created a supportive atmosphere for both patients and professionals, with a particular focus on emergency, intensive care, and neurology units. Modern healthcare environments are integrating Internet of Things (IoT)-enabled monitoring systems, smart energy management tools, predictive maintenance sensors, automated security solutions, and digital asset tracking platforms. These technologies enable real-time visibility into equipment performance, energy consumption, space usage patterns, and facility-wide safety. Hospitals implementing digital facility management solutions can reduce operational risk, prevent equipment failures, and ensure efficient resource utilization. The shift towards connected infrastructure helps optimize patient flows, support emergency readiness, and improve overall service responsiveness. As healthcare providers are modernizing their infrastructure, they continue to rely on technology-driven facilities management to support automation, enhance operational intelligence, and maintain seamless functioning in increasingly complex healthcare environments.

Healthcare Facilities Management Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global healthcare facilities management market, along with forecasts at the global, regional, and country levels from 2026-2034. The market has been categorized based on service type, business model, and end user.

Analysis by Service Type:

Property Services

Cleaning Services

Security Services

Catering Services

Support Services

Environmental Management Services

Support services account for the majority of the global healthcare facilities management market share. This segment holds various essential services that are essential for the smooth operation of the healthcare facilities such as administration services, coordinating of the materials, transport of the patients, as well as supervising the workforce. Support services are important because they aid in the improvement of operational efficiency, eliminate administrative burdens on healthcare providers, and improve a patient's quality of care. Because of the increasing complexity and size of healthcare facilities, robust support services are required. In 2023, Oracle upgraded its enterprise resource planning (ERP) and supply chain offerings with healthcare-focused features like financial consolidation, procurement, and supply chain management, designed to reduce expenses, increase efficiency, and assist in implementing new healthcare delivery methods.

Analysis by Business Model:

Outsourced

In-House

Outsourced holds the biggest market share according to the healthcare facilities management industry outlook. This segment includes healthcare establishments that contract or outsource non-essential jobs to third-party service providers such as

cleaning, security, and support service providers. The critical skills, economic necessity, and the possibility to concentrate on main medical services are driving the move toward outsourcing. However, healthcare service providers can rely on the services of professional facility management companies to guarantee the best quality of service, compliance with strict regulations, and integration of new technologies and the latest industry best practices. Healthcare facilities can be more flexible and scalable through outsourcing, without incurring the costs and responsibility of managing large in-house teams to meet changing needs. In a healthcare environment that is gradually complicated and resource-constrained, this business model is especially attractive. As per industry reports, in 2025, government hospitals in Maharashtra signed contracts with private companies to outsource advanced diagnostic and treatment services. This project is intended to enhance healthcare access in distant regions by utilizing the knowledge and resources of the private sector within public hospital facilities.

Analysis by End User:

Hospitals and Clinics

Long-term Healthcare Facilities

Others

Hospitals and clinics leads the market with around 48.0% of the healthcare facilities management market share in 2025. Because of their large infrastructure and continuous patient flow, hospitals and clinics make up a major share of the market. The management services are necessary for these establishments to run smoothly by ensuring cleanliness, as well as safety measures, waste management, and patient assistance services. Because of the need to ensure a secure and welcoming environment for patients and employees in hospitals, and clinics, along with to keep hold of distinguished prescribing conditions and extol operational proficiency, there is some need for solid administration in hospitals and clinics.

Regional Analysis:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

In 2025, North America accounted for the largest market share of over 34.4%. North America leads the market due to its strong healthcare infrastructure and stringent regulatory standards. The healthcare facilities management market demand is greatly influenced by the presence of sophisticated medical facilities, rising investments in healthcare services, and emphasis on maintaining optimal patient care environments. Factors, such as the growing number of healthcare facilities, the requirement of adhering to strict safety and hygiene standards, and the increasing use of advanced technologies, including IoT and AI, for effective building management are strengthening the market growth. Furthermore, there is a higher participation of important industry leaders and a shift towards delegating non-essential services to expert management companies. In 2025, Aramark introduced a new service that links patients in hospitals with distant clinical dietitians through Teladoc Health's telemedicine technology. This successful pilot initiative at the University Medical Center in Texas can overcome obstacles, such as geographic location and technology access, to provide vital medical nutrition therapy.

Healthcare Facilities Management Market Regional Takeaways:

United States Healthcare Facilities Management Market Analysis

The United States holds 86.40% of the market share in North America. The market is driven by the growing need for efficient, technology-enabled operations across hospitals, clinics, and long-term care centers, largely due to surging patient volumes, aging population, and increasing chronic disease cases that demand sophisticated facility upkeep. As per the US Census Bureau, the number of Americans aged 65 and older is set to rise to 82 Million by 2050, reflecting a 42% growth. Stringent regulatory requirements from federal and state agencies are encouraging healthcare providers to invest heavily in compliance-focused services, covering sanitation, waste handling, air quality control, life-safety systems, and infection-prevention protocols. The shift towards integrated delivery networks and the expansion of outpatient and ambulatory care settings are further creating the demand for scalable, outsourced facilities management solutions that can support dispersed infrastructures. Additionally, the rapid adoption of digital tools, such as IoT sensors for heating, ventilation, and air conditioning (HVAC)

optimization, AI-enabled predictive maintenance, automated energy monitoring, and smart building workflows, enhances the focus on cost efficiency and preventive asset management. Labor shortages among in-house maintenance and housekeeping teams also encourage hospitals to rely more on third-party expertise to maintain operational continuity.

Europe Healthcare Facilities Management Market Analysis

The Europe healthcare facilities management market is driven by stringent regulatory frameworks, strong emphasis on hygiene standards, and the region's shift towards cost-efficient healthcare operations amid rising public healthcare expenditure. Many European countries are modernizing hospital infrastructures, upgrading aging buildings, and integrating energy-efficient solutions, which is increasing the need for specialized facilities management services. The prominence of public-private partnerships (PPPs) also expands outsourcing opportunities across maintenance, cleaning, sterilization, catering, and energy optimization. The growing digitalization, such as smart building technologies, automated monitoring systems, and predictive maintenance tools, supports efficiency and compliance across a diverse healthcare landscape. Additionally, Europe's strong sustainability agenda, including carbon-neutral commitments and circular waste strategies, is driving healthcare providers to adopt environmentally responsible facility operations. Rising elderly population and the expansion of long-term and rehabilitation centers are further elevating the demand for high-quality facilities management to ensure safety, accessibility, and infection-controlled environments across the region. In November 2025, the UK's inaugural NHS National Rehabilitation Centre (NRC) in Nottinghamshire was set to welcome patients, marking the start of a new chapter in rehabilitation. The NRC is a 70-bed, advanced specialist rehabilitation facility for NHS patients who have undergone a life-altering illness or injury and is operated and staffed by Nottingham University Hospitals NHS Trust (NUH).

Asia-Pacific Healthcare Facilities Management Market Analysis

The Asia-Pacific healthcare facilities management market is driven by rapid hospital expansion, increasing healthcare investments, and the growing urban population that requires larger and more efficient medical infrastructures. Many countries in the region are upgrading public and private hospitals with modern equipment and digital building systems, increasing the need for outsourced facilities management. Rising awareness about hygiene, infection control, and patient safety is fueling the demand for professional cleaning, maintenance, and waste management services. Additionally, government agencies promoting healthcare modernization and smart facility initiatives

are encouraging the adoption of IoT-based monitoring, energy management tools, and predictive maintenance. As per the IMACR Group, the India IoT market size was valued at USD 1.4 Billion in 2024. The growing presence of international hospital chains further boosts demand for standardized, high-quality facility operations across diverse countries.

Latin America Healthcare Facilities Management Market Analysis

The Latin America healthcare facilities management market is driven by expanding hospital capacity, increasing investments in private healthcare, and the modernization of aging medical infrastructures. Rising awareness about infection control and patient safety, especially in urban hospitals, is fueling the demand for outsourced cleaning, maintenance, and waste services. Cost pressure on healthcare providers encourages partnerships with third-party facility experts to improve efficiency. Additionally, gradual adoption of digital systems, energy-efficient upgrades, and government support for improving public healthcare facilities are propelling the market growth.

Middle East and Africa Healthcare Facilities Management Market Analysis

The Middle East and Africa healthcare facilities management market is driven by large-scale hospital construction, government initiatives to upgrade healthcare infrastructure, and increasing demand for international-standard facility operations. Rising focus on hygiene, infection prevention, and accreditation compliance is encouraging hospitals to rely on specialized service providers. The growing private healthcare investment, especially in Gulf countries, is accelerating the adoption of modern maintenance, waste management, and energy-optimized systems. Additionally, digitization efforts and smart hospital projects support greater use of automated monitoring and preventive maintenance solutions across the region.

Leading Healthcare Facilities Management Companies:

The healthcare facilities management market is highly competitive, with key players offering a wide range of services, including cleaning, maintenance, security, waste management, and energy efficiency solutions. The leading market players leverage advanced technologies such as IoT and automation for predictive maintenance and operational efficiency. Increasing outsourcing of non-core services by healthcare providers intensifies competition. Players focus on sustainable practices and customized solutions to meet stringent regulatory standards and enhance patient satisfaction. Regional and niche providers compete by offering cost-effective,

specialized services. The market is driven by innovation, regulatory compliance, and rising healthcare infrastructure investments.

The report provides a comprehensive analysis of the leading companies in the leading healthcare facilities management market with detailed profiles of all major companies, including:

ABM Industries Incorporated

Aramark

Compass Group India

Ecolab Inc.

International Business Machines Corporation

ISS A/S

Jones Lang LaSalle IP, Inc.

Medxcel

Mitie Group plc

OCS Group Holdings Ltd.

Serco

Sodexo

Key Questions Answered in This Report

- 1.How big is the healthcare facilities management market?
- 2.What is the future outlook of the healthcare facilities management market?
- 3.What are the key factors driving the healthcare facilities management market?
- 4.Which region accounts for the largest healthcare facilities management market share?
- 5.Which are the leading companies in the global healthcare facilities management market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL HEALTHCARE FACILITIES MANAGEMENT MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY SERVICE TYPE

- 6.1 Property Services
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Cleaning Services
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Security Services

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Catering Services
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Support Services
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast
- 6.6 Environmental Management Services
 - 6.6.1 Market Trends
 - 6.6.2 Market Forecast

7 MARKET BREAKUP BY BUSINESS MODEL

- 7.1 Outsourced
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 In-House
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast

8 MARKET BREAKUP BY END USER

- 8.1 Hospitals and Clinics
 - 8.1.1 Market Trends
 - 8.1.2 Market Forecast
- 8.2 Long-term Healthcare Facilities
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Others
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast

9 MARKET BREAKUP BY REGION

- 9.1 North America
 - 9.1.1 United States
 - 9.1.1.1 Market Trends
 - 9.1.1.2 Market Forecast

- 9.1.2 Canada
 - 9.1.2.1 Market Trends
 - 9.1.2.2 Market Forecast
- 9.2 Asia-Pacific
 - 9.2.1 China
 - 9.2.1.1 Market Trends
 - 9.2.1.2 Market Forecast
 - 9.2.2 Japan
 - 9.2.2.1 Market Trends
 - 9.2.2.2 Market Forecast
 - 9.2.3 India
 - 9.2.3.1 Market Trends
 - 9.2.3.2 Market Forecast
 - 9.2.4 South Korea
 - 9.2.4.1 Market Trends
 - 9.2.4.2 Market Forecast
 - 9.2.5 Australia
 - 9.2.5.1 Market Trends
 - 9.2.5.2 Market Forecast
 - 9.2.6 Indonesia
 - 9.2.6.1 Market Trends
 - 9.2.6.2 Market Forecast
 - 9.2.7 Others
 - 9.2.7.1 Market Trends
 - 9.2.7.2 Market Forecast
- 9.3 Europe
 - 9.3.1 Germany
 - 9.3.1.1 Market Trends
 - 9.3.1.2 Market Forecast
 - 9.3.2 France
 - 9.3.2.1 Market Trends
 - 9.3.2.2 Market Forecast
 - 9.3.3 United Kingdom
 - 9.3.3.1 Market Trends
 - 9.3.3.2 Market Forecast
 - 9.3.4 Italy
 - 9.3.4.1 Market Trends
 - 9.3.4.2 Market Forecast
 - 9.3.5 Spain

- 9.3.5.1 Market Trends
- 9.3.5.2 Market Forecast
- 9.3.6 Russia
 - 9.3.6.1 Market Trends
 - 9.3.6.2 Market Forecast
- 9.3.7 Others
 - 9.3.7.1 Market Trends
 - 9.3.7.2 Market Forecast
- 9.4 Latin America
 - 9.4.1 Brazil
 - 9.4.1.1 Market Trends
 - 9.4.1.2 Market Forecast
 - 9.4.2 Mexico
 - 9.4.2.1 Market Trends
 - 9.4.2.2 Market Forecast
 - 9.4.3 Others
 - 9.4.3.1 Market Trends
 - 9.4.3.2 Market Forecast
- 9.5 Middle East and Africa
 - 9.5.1 Market Trends
 - 9.5.2 Market Breakup by Country
 - 9.5.3 Market Forecast

10 SWOT ANALYSIS

- 10.1 Overview
- 10.2 Strengths
- 10.3 Weaknesses
- 10.4 Opportunities
- 10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTERS FIVE FORCES ANALYSIS

- 12.1 Overview
- 12.2 Bargaining Power of Buyers
- 12.3 Bargaining Power of Suppliers
- 12.4 Degree of Competition

12.5 Threat of New Entrants

12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

14.1 Market Structure

14.2 Key Players

14.3 Profiles of Key Players

14.3.1 ABM Industries Incorporated

14.3.1.1 Company Overview

14.3.1.2 Product Portfolio

14.3.1.3 Financials

14.3.1.4 SWOT Analysis

14.3.2 Aramark

14.3.2.1 Company Overview

14.3.2.2 Product Portfolio

14.3.2.3 Financials

14.3.2.4 SWOT Analysis

14.3.3 Compass Group India

14.3.3.1 Company Overview

14.3.3.2 Product Portfolio

14.3.3.3 Financials

14.3.3.4 SWOT Analysis

14.3.4 Ecolab Inc.

14.3.4.1 Company Overview

14.3.4.2 Product Portfolio

14.3.4.3 Financials

14.3.4.4 SWOT Analysis

14.3.5 International Business Machines Corporation

14.3.5.1 Company Overview

14.3.5.2 Product Portfolio

14.3.5.3 Financials

14.3.5.4 SWOT Analysis

14.3.6 ISS A/S

14.3.6.1 Company Overview

14.3.6.2 Product Portfolio

14.3.6.3 Financials

- 14.3.6.4 SWOT Analysis
- 14.3.7 Jones Lang LaSalle IP, Inc.
 - 14.3.7.1 Company Overview
 - 14.3.7.2 Product Portfolio
 - 14.3.7.3 Financials
 - 14.3.7.4 SWOT Analysis
- 14.3.8 Medxcel
 - 14.3.8.1 Company Overview
 - 14.3.8.2 Product Portfolio
 - 14.3.8.3 Financials
 - 14.3.8.4 SWOT Analysis
- 14.3.9 Mitie Group plc
 - 14.3.9.1 Company Overview
 - 14.3.9.2 Product Portfolio
 - 14.3.9.3 Financials
 - 14.3.9.4 SWOT Analysis
- 14.3.10 OCS Group Holdings Ltd.
 - 14.3.10.1 Company Overview
 - 14.3.10.2 Product Portfolio
- 14.3.11 Serco
 - 14.3.11.1 Company Overview
 - 14.3.11.2 Product Portfolio
 - 14.3.11.3 Financials
 - 14.3.11.4 SWOT Analysis
- 14.3.12 Sodexo
 - 14.3.12.1 Company Overview
 - 14.3.12.2 Product Portfolio
 - 14.3.12.3 Financials
 - 14.3.12.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Healthcare Facilities Management Market: Key Industry Highlights, 2025 and 2034

Table 2: Global: Healthcare Facilities Management Market Forecast: Breakup by Service Type (in Million USD), 2026-2034

Table 3: Global: Healthcare Facilities Management Market Forecast: Breakup by Business Model (in Million USD), 2026-2034

Table 4: Global: Healthcare Facilities Management Market Forecast: Breakup by End User (in Million USD), 2026-2034

Table 5: Global: Healthcare Facilities Management Market Forecast: Breakup by Region (in Million USD), 2026-2034

Table 6: Global: Healthcare Facilities Management Market: Competitive Structure

Table 7: Global: Healthcare Facilities Management Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Healthcare Facilities Management Market: Major Drivers and Challenges

Figure 2: Global: Healthcare Facilities Management Market: Sales Value (in Billion USD), 2020-2025

Figure 3: Global: Healthcare Facilities Management Market Forecast: Sales Value (in Billion USD), 2026-2034

Figure 4: Global: Healthcare Facilities Management Market: Breakup by Service Type (in %), 2025

Figure 5: Global: Healthcare Facilities Management Market: Breakup by Business Model (in %), 2025

Figure 6: Global: Healthcare Facilities Management Market: Breakup by End User (in %), 2025

Figure 7: Global: Healthcare Facilities Management Market: Breakup by Region (in %), 2025

Figure 8: Global: Healthcare Facilities Management (Property Services) Market: Sales Value (in Million USD), 2020 & 2025

Figure 9: Global: Healthcare Facilities Management (Property Services) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 10: Global: Healthcare Facilities Management (Cleaning Services) Market: Sales Value (in Million USD), 2020 & 2025

Figure 11: Global: Healthcare Facilities Management (Cleaning Services) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 12: Global: Healthcare Facilities Management (Security Services) Market: Sales Value (in Million USD), 2020 & 2025

Figure 13: Global: Healthcare Facilities Management (Security Services) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 14: Global: Healthcare Facilities Management (Catering Services) Market: Sales Value (in Million USD), 2020 & 2025

Figure 15: Global: Healthcare Facilities Management (Catering Services) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 16: Global: Healthcare Facilities Management (Support Services) Market: Sales Value (in Million USD), 2020 & 2025

Figure 17: Global: Healthcare Facilities Management (Support Services) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 18: Global: Healthcare Facilities Management (Environmental Management Services) Market: Sales Value (in Million USD), 2020 & 2025

Figure 19: Global: Healthcare Facilities Management (Environmental Management Services) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 20: Global: Healthcare Facilities Management (Outsourced) Market: Sales Value (in Million USD), 2020 & 2025

Figure 21: Global: Healthcare Facilities Management (Outsourced) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 22: Global: Healthcare Facilities Management (In-House) Market: Sales Value (in Million USD), 2020 & 2025

Figure 23: Global: Healthcare Facilities Management (In-House) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 24: Global: Healthcare Facilities Management (Hospitals and Clinics) Market: Sales Value (in Million USD), 2020 & 2025

Figure 25: Global: Healthcare Facilities Management (Hospitals and Clinics) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 26: Global: Healthcare Facilities Management (Long-term Healthcare Facilities) Market: Sales Value (in Million USD), 2020 & 2025

Figure 27: Global: Healthcare Facilities Management (Long-term Healthcare Facilities) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 28: Global: Healthcare Facilities Management (Other End Users) Market: Sales Value (in Million USD), 2020 & 2025

Figure 29: Global: Healthcare Facilities Management (Other End Users) Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 30: North America: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 31: North America: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 32: United States: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 33: United States: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 34: Canada: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 35: Canada: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 36: Asia-Pacific: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 37: Asia-Pacific: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 38: China: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

USD), 2020 & 2025

Figure 39: China: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 40: Japan: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 41: Japan: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 42: India: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 43: India: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 44: South Korea: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 45: South Korea: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 46: Australia: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 47: Australia: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 48: Indonesia: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 49: Indonesia: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 50: Others: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 51: Others: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 52: Europe: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 53: Europe: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 54: Germany: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 55: Germany: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 56: France: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 57: France: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 58: United Kingdom: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 59: United Kingdom: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 60: Italy: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 61: Italy: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 62: Spain: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 63: Spain: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 64: Russia: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 65: Russia: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 66: Others: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 67: Others: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 68: Latin America: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 69: Latin America: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 70: Brazil: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 71: Brazil: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 72: Mexico: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 73: Mexico: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 74: Others: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 75: Others: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 76: Middle East and Africa: Healthcare Facilities Management Market: Sales Value (in Million USD), 2020 & 2025

Figure 77: Middle East and Africa: Healthcare Facilities Management Market: Breakup

by Country (in %), 2025

Figure 78: Middle East and Africa: Healthcare Facilities Management Market Forecast: Sales Value (in Million USD), 2026-2034

Figure 79: Global: Healthcare Facilities Management Industry: SWOT Analysis

Figure 80: Global: Healthcare Facilities Management Industry: Value Chain Analysis

Figure 81: Global: Healthcare Facilities Management Industry: Porter's Five Forces Analysis?

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