

# **Saudi Arabia Facility Management Market Segmented By Service (Property, Cleaning, Security, Support, Catering & Others), By Type (Hard Services { Mechanical, Electrical and Plumbing, Preventive Maintenance, Structural Maintenance, HVAC and Asset Management, Others} and Soft Services {Cleaning Services, Security Services, Catering Services, Health Safety & Waste Management Services, Others }), By Industry (Organized and Unorganized), By End User (Commercial, Residential, Industrial and Public Sector), By Sectors (Education, Healthcare, Real Estate, Banking, Hospitality, Housing, Others), By Mode (In-House, Outsourced {Single, Bundled, Integrated}) By Region, and By Competition, 2018-2028F**

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## **Abstracts**

Saudi Arabia Facility Management Market has valued at USD 26.28 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 8.05% through 2028. The Saudi Arabia Facility Management Market is experiencing significant growth and transformation, driven by various factors that reflect the evolving needs of organizations and the nation's commitment to modernization. Rapid urbanization and extensive infrastructure development, in line with Saudi Arabia's Vision 2030 plan, have led to an increased demand for facility management services. Facility managers play a

critical role in ensuring the efficient operation and maintenance of buildings and infrastructure, aligning with sustainability goals and enhancing occupant well-being.

The focus on operational efficiency and cost reduction is another driving force, with organizations seeking to optimize their budgets and improve resource utilization. This has spurred the adoption of Integrated Facility Management (IFM) services, allowing clients to consolidate various facility management functions under a single provider and achieve streamlined operations.

Moreover, sustainability and environmental responsibility are prominent drivers, with facility managers implementing green building practices, energy-efficient solutions, and waste reduction programs to align with global environmental goals and reduce operational costs. Technological advancements, particularly in smart building solutions and IoT integration, have revolutionized the industry, enhancing building efficiency, security, and occupant comfort.

The Saudi Arabia Facility Management Market is poised for continued expansion as organizations recognize the strategic value of facility management in achieving their operational and sustainability objectives. Facility management providers are responding to these drivers by offering innovative, technology-driven solutions that cater to the diverse needs of clients in various sectors, from commercial real estate to healthcare and beyond.

## Key Market Drivers

### Rapid Urbanization and Infrastructure Development

One of the primary drivers fueling the growth of the Saudi Arabia Facility Management Market is the country's rapid urbanization and extensive infrastructure development. Saudi Arabia is undergoing a transformative phase with ambitious initiatives such as Vision 2030, which aims to diversify the economy and reduce its dependency on oil. As a result, there is a surge in construction projects, including commercial buildings, residential complexes, hospitals, educational institutions, and industrial facilities.

The increased construction activity has created a substantial demand for facility management services to ensure the effective operation and maintenance of these structures. Facility managers play a vital role in preserving the longevity and functionality of these assets, optimizing energy usage, and providing a safe and comfortable environment for occupants. The growth of smart cities and sustainable

infrastructure further amplifies the need for advanced facility management solutions.

Facility management companies are capitalizing on this driver by expanding their service portfolios, adopting technology-driven solutions, and partnering with construction firms to offer integrated facility management services from the initial design phase through the entire lifecycle of buildings.

### Focus on Operational Efficiency and Cost Reduction

In an era marked by economic uncertainties and fiscal responsibility, organizations across industries in Saudi Arabia are placing a heightened emphasis on operational efficiency and cost reduction. Facility management services are viewed as instrumental in achieving these objectives.

Facility managers are tasked with optimizing the use of resources, reducing energy consumption, and implementing preventive maintenance strategies to minimize equipment downtime and costly repairs. They leverage technology, such as computerized maintenance management systems (CMMS) and predictive analytics, to proactively identify and address maintenance issues.

By outsourcing facility management functions to specialized providers, organizations can tap into the expertise and experience of professionals who are skilled in streamlining operations while adhering to budget constraints. This focus on cost-effective facility management services is driving the market's growth, as businesses recognize the potential for substantial cost savings and operational improvements.

### Increasing Demand for Integrated Facility Management (IFM)

The demand for Integrated Facility Management (IFM) services is on the rise in Saudi Arabia, and this trend serves as a significant driver for the facility management market. IFM is a comprehensive approach that combines multiple facility management services under a single provider, offering clients a one-stop solution for their diverse facility management needs.

Saudi Arabian organizations, especially those with large and complex facilities, are increasingly seeking IFM solutions to streamline their operations, reduce administrative complexities, and improve service quality. IFM providers manage a wide range of services, including maintenance, cleaning, security, landscaping, and energy management, allowing clients to focus on their core business activities.

The integration of various facility management services promotes efficiency, consistency, and cost savings. It also simplifies communication and coordination among different service providers, leading to improved overall facility management.

To meet the growing demand for IFM services, facility management companies are expanding their service portfolios and enhancing their capabilities to offer integrated solutions that cater to the unique needs of clients in various sectors, such as commercial real estate, healthcare, and hospitality.

### Emphasis on Sustainability and Environmental Responsibility

Sustainability and environmental responsibility have become paramount considerations in the Saudi Arabia Facility Management Market. Saudi Arabia is making concerted efforts to reduce its environmental footprint and promote sustainable practices across industries.

Facility managers play a pivotal role in this endeavor by implementing green building practices, energy-efficient solutions, waste reduction programs, and environmentally friendly maintenance strategies. Sustainable facility management practices not only align with global environmental goals but also contribute to significant cost savings by reducing energy consumption and minimizing waste.

The Kingdom's commitment to green building certifications, such as Leadership in Energy and Environmental Design (LEED) and Estidama, has led to a growing focus on sustainability within the construction and facility management sectors. Facility management providers are actively seeking opportunities to obtain green certifications and help clients achieve their sustainability objectives.

This emphasis on sustainability not only drives demand for sustainable facility management services but also incentivizes facility management companies to invest in eco-friendly technologies and practices, further advancing the market.

### Technological Advancements and Smart Building Solutions

The rapid advancement of technology, particularly in the realm of smart building solutions, is a major driver propelling the Saudi Arabia Facility Management Market. Smart building technologies leverage the Internet of Things (IoT), sensors, and automation systems to enhance the operational efficiency and sustainability of

buildings.

Facility management companies are integrating smart building solutions to offer clients state-of-the-art facilities that optimize energy usage, provide real-time data analytics, and enhance occupant comfort and safety. These technologies enable remote monitoring and control of building systems, predictive maintenance, and improved security measures.

The demand for smart buildings is on the rise in Saudi Arabia, driven by the government's initiatives to create smart cities and promote energy efficiency. Facility managers are adopting Building Management Systems (BMS) and Energy Management Systems (EMS) to meet these demands.

Moreover, the COVID-19 pandemic has accelerated the adoption of touchless and remote technologies for building access control, security, and HVAC systems, further driving the integration of technology into facility management operations.

Facility management providers are investing in technology infrastructure, digital platforms, and specialized software to offer advanced facility management services that align with the evolving needs of clients in a technology-driven world. This technological advancement is expected to continue shaping the Saudi Arabia Facility Management Market's growth trajectory.

## Key Market Challenges

### Regulatory Compliance and Localization

One of the primary challenges in the Saudi Arabia Facility Management market is navigating the complex regulatory landscape and localization requirements. Saudi Arabia has a stringent regulatory environment, including labor laws, building codes, and safety standards. Facility management providers must ensure that their operations comply with these regulations to avoid legal complications and penalties.

Moreover, Saudi Arabia has implemented localization policies to increase the employment of Saudi nationals in various industries, including facility management. Companies operating in the facility management sector must meet Saudization quotas, which mandate the employment of a certain percentage of Saudi nationals. Meeting these quotas while maintaining a skilled and efficient workforce can be challenging for facility management firms.

To address this challenge, facility management companies often engage in strategic partnerships and collaborations with local businesses and institutions to meet Saudization requirements and ensure compliance with regulations. They also invest in training and development programs to enhance the skills of Saudi nationals entering the workforce.

### Talent Acquisition and Retention

Talent acquisition and retention pose significant challenges in the Saudi Arabia Facility Management market. The demand for skilled facility management professionals, including engineers, technicians, and skilled laborers, continues to rise with the growth of the real estate and infrastructure sectors. However, attracting and retaining talent in a competitive job market can be difficult.

The facility management sector often faces competition from other industries, making it essential for companies to offer competitive compensation packages, career advancement opportunities, and training programs to attract and retain skilled professionals. The need for specialized training and certifications further complicates the talent acquisition process.

Additionally, the turnover rate can be relatively high in this sector due to the demanding nature of facility management work. Companies must implement effective employee engagement strategies, invest in continuous professional development, and create a positive workplace culture to address these challenges.

### Cost Management and Budget Constraints

Cost management is an ongoing challenge for facility management providers in Saudi Arabia. Organizations, especially in the wake of economic uncertainties, are keen on optimizing their budgets and reducing operational costs. Facility management companies are under constant pressure to deliver high-quality services while minimizing expenses.

This challenge is particularly pronounced in sectors like healthcare, where budget constraints can impact the availability of resources for facility management. Providers must find innovative ways to enhance operational efficiency, adopt preventive maintenance strategies to reduce equipment downtime, and implement energy-efficient solutions to lower utility costs.



Moreover, the rising costs of materials, labor, and technology investments can strain facility management budgets. Providers must carefully manage these costs to maintain profitability while meeting client expectations for service quality.

### Technological Integration and Cybersecurity

The integration of advanced technologies into facility management operations presents both opportunities and challenges. Facility management providers in Saudi Arabia are increasingly adopting smart building technologies, IoT devices, and computerized maintenance management systems (CMMS) to enhance efficiency and service quality.

However, the integration of these technologies can be complex, requiring significant investments in infrastructure and training. Ensuring seamless interoperability among different systems is a challenge, and providers must carefully plan and execute technology integration projects to avoid disruptions.

Additionally, the growing reliance on digital systems and data poses cybersecurity risks. Facility management providers must implement robust cybersecurity measures to protect sensitive client and operational data. The threat of cyberattacks and data breaches is a constant concern, and companies must stay vigilant in safeguarding their digital assets.

### Economic Uncertainty and Market Competition

Economic uncertainty and market competition pose significant challenges in the Saudi Arabia Facility Management market. Economic fluctuations and uncertainties, such as fluctuations in oil prices and global economic conditions, can impact investment decisions, leading to fluctuations in demand for facility management services.

Market competition is intense, with numerous local and international facility management providers vying for contracts and clients. This competition puts pressure on pricing and service quality. To differentiate themselves, facility management companies must focus on innovation, customer satisfaction, and the ability to offer integrated and customized solutions.

Navigating economic uncertainties requires strategic planning and diversification of services and client portfolios. Facility management providers must be agile and adaptable to changing market conditions to thrive in a competitive landscape.

## Key Market Trends

### Smart Building Integration for Enhanced Efficiency

One of the notable trends in the Saudi Arabia Facility Management market is the increasing integration of smart building technologies. As Saudi Arabia seeks to modernize its infrastructure and improve energy efficiency, facility managers are turning to smart building solutions that use sensors, IoT devices, and automation systems to optimize operations.

Smart building technology enables real-time monitoring and control of various systems, such as lighting, HVAC (heating, ventilation, and air conditioning), security, and energy management. Facility managers can remotely adjust settings, detect maintenance issues early, and make data-driven decisions to improve building performance and reduce operational costs.

This trend aligns with the Kingdom's Vision 2030 plan, which emphasizes sustainability and the use of technology to enhance infrastructure. As a result, facility management companies in Saudi Arabia are increasingly adopting smart building solutions to meet these goals and provide more efficient services to their clients.

### Sustainability and Green Initiatives

Sustainability and green initiatives have gained significant traction in the Saudi Arabia Facility Management market. The Kingdom is committed to reducing its carbon footprint and promoting sustainable practices across industries. Facility managers are playing a crucial role in achieving these sustainability goals.

One notable aspect of this trend is the growing emphasis on green building certifications, such as LEED (Leadership in Energy and Environmental Design) and Estidama, which focus on environmentally friendly building practices and energy efficiency. Facility managers are expected to implement and maintain sustainable building features, like energy-efficient lighting and HVAC systems, renewable energy sources, and waste management programs.

Moreover, waste reduction and recycling programs are becoming standard practices in facility management. Companies are also exploring water conservation measures, especially relevant in the arid Saudi Arabian climate.



## Outsourcing Facility Management Services

A notable trend in the Saudi Arabia Facility Management market is the increasing adoption of outsourcing facility management services by organizations across various sectors. Outsourcing allows companies to focus on their core business activities while leveraging the expertise and resources of specialized facility management providers.

This trend is particularly prominent among commercial real estate owners, healthcare institutions, and large enterprises. By outsourcing facility management, these organizations can benefit from cost savings, operational efficiency, access to advanced technologies, and compliance with regulations.

Outsourcing also enables businesses to access a broader range of facility management services, including integrated facilities management (IFM), which encompasses multiple services like maintenance, cleaning, security, and energy management under one provider. This approach streamlines operations, reduces administrative burdens, and enhances service quality.

## Emphasis on Health and Safety

The COVID-19 pandemic has significantly influenced the Saudi Arabia Facility Management market by placing a renewed emphasis on health and safety measures. Facility managers are implementing stringent hygiene and sanitization protocols to ensure the safety of building occupants and visitors.

These measures include regular disinfection of high-touch surfaces, the installation of touchless technologies such as automatic doors and hand sanitizers, and the implementation of social distancing guidelines within facilities. Additionally, facility managers are investing in advanced air quality monitoring and filtration systems to improve indoor air quality.

Remote monitoring and control systems have also gained importance in maintaining health and safety standards, allowing facility managers to track occupancy levels and compliance with safety protocols in real time.

## Technology Adoption for Workforce Management

The adoption of technology for workforce management is another significant trend in the

Saudi Arabia Facility Management market. Facility management companies are investing in digital tools and platforms to enhance workforce productivity, monitor performance, and improve service delivery.

Mobile apps and software solutions enable facility managers to efficiently assign tasks, track employee activities, and manage work orders. These digital tools provide real-time insights into workforce operations, helping organizations optimize staffing levels and respond quickly to maintenance requests or emergencies.

Furthermore, the use of computerized maintenance management systems (CMMS) and IoT devices allows facility managers to predict equipment failures, schedule preventive maintenance, and reduce downtime. These technologies not only enhance the overall efficiency of facility management but also contribute to cost savings and improved service quality.

## Segmental Insights

### Service Insights

The property service segment accounted for the largest share of 32.87% in the Saudi Arabia facility management market in 2022. This segment is expected to maintain its market dominance over the next five years. Moreover, this is due to increasing awareness of firms about corporate real-estate management.

Saudi Arabia has experienced a significant real estate boom in recent years, driven by extensive urbanization, infrastructure development, and government-led initiatives such as Vision 2030. The construction of new commercial and residential properties has created a robust demand for facility management services, particularly in property services.

The Kingdom boasts a diverse real estate portfolio that includes commercial office spaces, residential communities, shopping malls, hotels, and industrial facilities. Each of these property types requires specialized facility management services to cater to their unique needs, making property services a versatile and dominant segment.

Organizations in Saudi Arabia are increasingly recognizing the value of outsourcing facility management functions. Outsourcing allows them to focus on their core business activities while entrusting property service providers with the responsibility of managing their real estate assets efficiently and professionally.

The property service segment often extends its offerings to include integrated facility management (IFM), a comprehensive approach that combines multiple facility management services under one provider. IFM providers manage various functions, including maintenance, cleaning, security, landscaping, and energy management, offering clients a holistic solution for their diverse facility management needs.

## End User Insights

The commercial segment in Saudi Arabia facility management market stood at USD7.07 billion, with a market share of 39.82% in 2022 and the market is projected to reach USD17.56 billion in the next five years, exhibiting a CAGR of 8.77%, in value terms, during 2023E-2028F, on account of large-scale development of commercial real estate projects.

Saudi Arabia has been actively diversifying its economy away from oil dependency, with a strong focus on the commercial sector. As part of its Vision 2030 plan, the Kingdom has been encouraging investments in commercial infrastructure, including office buildings, retail spaces, and business parks. This economic diversification has resulted in a robust demand for facility management services within the commercial sector.

The Saudi commercial sector has witnessed significant growth, with the establishment of new businesses, both domestic and international. This growth has led to an increased need for professional facility management services to ensure the efficient operation and maintenance of commercial spaces.

The growth of the commercial sector has led to an increased demand for office spaces, particularly in cities like Riyadh, Jeddah, and Dammam. Office buildings require comprehensive facility management services to maintain a conducive work environment, including HVAC maintenance, security, and cleaning services.

Saudi Arabia has experienced a boom in the retail sector, with the construction of shopping malls, supermarkets, and retail outlets. Retail spaces demand specialized facility management services to ensure a safe and pleasant shopping experience for customers, including maintenance of lighting, escalators, and security systems.

## Regional Insights

Riyadh region accounted for the largest share of 33.98% in Saudi Arabia facility

management market in 2022. This region is expected to maintain its market dominance during the forecast period, owing to the presence of developed buildings and metro cities in the region.

Riyadh is not only the capital of Saudi Arabia but also its economic and administrative hub. It hosts the headquarters of numerous government ministries, financial institutions, and major corporations. This concentration of economic activity naturally generates a high demand for facility management services to maintain and operate the city's extensive commercial and administrative infrastructure.

Riyadh has experienced rapid urbanization and infrastructure development in line with Saudi Arabia's Vision 2030 plan. This has resulted in the construction of numerous commercial and residential projects, office complexes, shopping malls, and residential communities. The city's vast real estate portfolio requires comprehensive facility management to ensure efficient operation, maintenance, and sustainability.

Riyadh is home to a thriving business ecosystem with a diverse range of industries, including finance, healthcare, education, and technology. The concentration of businesses and corporate offices has led to a significant demand for facility management services. Office buildings, in particular, require facility management support for a wide range of functions, including HVAC, security, and maintenance.

The Saudi government has made substantial investments in Riyadh to develop the city's infrastructure, transportation, and public facilities. This has led to the construction of government buildings, public parks, and cultural institutions, all of which require professional facility management to ensure their optimal functioning.

### Key Market Players

Saudi EMCOR Company Ltd (EFS Facility Management)

Muheel Services for Maintenance & Operations LLC

Khidmah LLC

Enova Facilities Management Services LLC

Saudi Binladin Group Operation & Maintenance

Musanadah Facilities Management Co. LTD

Al Mahmal Facilities Services

Al Khozama Facility Management Services

Five Moons Company Ltd

Takamul AlOula Facility Management

Al Borj Facility Management

Sodexo Saudi Arabia LLC

Jones Lang LaSalle Saudi Arabia Limited

Algozaibi Services Company Limited

Tamimi Global Co. Ltd.

Saudi Catering and Contracting Company

AL Yusr Industrial Contracting Co

Al Suwaidi Holding Co

Zamil Operations and Maintenance Company Limited

Newrest (Saudi Airline Catering Company)

Report Scope:

In this report, the Saudi Arabia Facility Management Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Facility Management Market, By Service:

Property

Cleaning

Security

Support

Catering

Others

### Saudi Arabia Facility Management Market, By Type:

#### Hard Services

Mechanical

Electrical and Plumbing

Preventive Maintenance

Structural Maintenance

HVAC and Asset Management

Others

#### Soft Services

Cleaning Services

Security Services

Catering Services

Health Safety & Waste Management Services

Others



### Saudi Arabia Facility Management Market, By Industry:

Organized

Unorganized

### Saudi Arabia Facility Management Market, By End User:

Commercial

Residential

Industrial

Public Sector

### Saudi Arabia Facility Management Market, By Sectors:

Education

Healthcare

Real Estate

Banking

Hospitality

Housing

Others

### Saudi Arabia Facility Management Market, By Mode:

In-House

Outsourced

Single

Bundled

Integrated

Saudi Arabia Facility Management Market, By Region:

Makkah

Riyadh

Eastern Province

Rest of Saudi Arabia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Facility Management Market.

Available Customizations:

Saudi Arabia Facility Management Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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## **36. ENHANCED LIST OF COMPANIES OPERATING IN FACILITY MANAGEMENT MARKET**

## **37. STRATEGIC RECOMMENDATIONS**

## **38. ABOUT US & DISCLAIMER**

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