

Turkey Facility Management Market By Service (Property, Cleaning, Security, Support, Catering & Others), By Type (Hard Services, Soft Services), By Industry (Organized, Unorganized), By End User (Commercial, Residential, Industrial, Public Sector), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Abstracts

Turkey Facility Management Market was valued at USD 12.69 Billion in 2024 and is expected to reach USD 18.33 Billion by 2030 with a CAGR of 6.16% during the forecast period.

The Turkey Facility Management (FM) market is witnessing steady growth, driven by rapid urbanization, government infrastructure initiatives, and an increasing demand for professional services across residential, commercial, industrial, and institutional sectors. The country's economic diversification under Vision 2030 is accelerating investments in real estate, tourism, healthcare, education, and public infrastructure, all of which require robust facility management support. As Turkey continues to develop large-scale projects such as new cities, mixed-use developments, airports, and hospitality hubs, the demand for both hard and soft FM services is expanding. Hard services, including mechanical, electrical, plumbing (MEP), fire safety, and building maintenance systems, form the backbone of the market. Meanwhile, soft services such as cleaning, security, landscaping, and waste management are gaining importance with the rise in hygiene awareness and sustainability practices post-COVID-19.

The FM market in Turkey is shifting from traditional in-house models toward outsourced and integrated service solutions. Clients are increasingly favoring bundled contracts that

offer comprehensive hard and soft service coverage under a single management structure, enabling cost efficiency and streamlined operations. The growing use of technologies like IoT-based building management systems, automation tools, and cloud-based platforms is enhancing operational efficiency and real-time monitoring, helping service providers meet client expectations and regulatory standards. However, the market remains fragmented, with a mix of large international players and smaller local companies competing on pricing and service specialization.

Cost pressure, limited availability of skilled labor, and inflation are some of the ongoing challenges. At the same time, the unorganized sector, offering competitive rates, continues to thrive, especially for small-scale or single-service contracts. Despite these obstacles, opportunities exist in areas such as energy management, sustainability consulting, and FM solutions tailored for smart buildings and green infrastructure. As more organizations seek to reduce operational costs and comply with environmental standards, demand for integrated and digital FM solutions is expected to rise. In the coming years, the Turkey FM market is poised for transformation, moving toward more organized, technology-driven, and client-focused services that align with the Kingdom's long-term development goals and rising service quality expectations.

Key Market Drivers

Infrastructure Expansion & Mega Projects

Turkey has embarked on over 22 strategic infrastructure projects totaling around USD 30 billion, including five artificial islands and major transport upgrades. The USD 1.1 billion Turkey International Airport terminal, opened in January 2021, expanded capacity to 14 million passengers/year and accommodates 4,700 bags per peak hour, along with 7,000 new parking spaces. The 109 km metro rail plan—Phase One already in tender—aims to shuttle 43,000 passengers/hour across over 20 stations, driving long-term FM demand in transit facilities. Road infrastructure also surged, such as the six lane, 5 km Busaiteen–Manama causeway, part of a BD 40.5 million (USD 107 million) highway upgrade launched in 2018, set for completion in 2024. Residential and commercial growth also spiked—40% of housing projects awarded in 2023 are in the Southern region, which also saw 12% industrial investment growth that year. These figures translate into large-scale FM needs across tens of millions of square meters of new construction, ranging from airports, metro stations, public roadways, housing, and industrial zones.

Key Market Challenges

High Cost of Skilled Labor & Nationalization Policies

A major challenge in Turkey's FM market is the increasing cost of labor, particularly skilled technicians. Wage inflation of 20–30% for certified MEP and FM professionals has been reported over recent years. With nationalization initiatives under Turkeyisation, FM companies must increase Turkeyi staff by 5% per year until nationals make up 50% of their workforce in mid-sized and larger enterprises. While beneficial for local employment, this mandates extensive investment in training, certification, and wage restructuring. Firms often provide scholarships, technical apprenticeships, or partner with educational bodies—costing BHD 3,000–5,000 (approx. USD 8,000–13,300) per trainee annually. Recovery periods for this investment average around 18–24 months, squeezing margins in the short term. Moreover, high turnover among expatriates (over 15% annually) adds recruitment and training overhead, increasing operational expenses and reducing consistency of service delivery. Balancing mandated national staffing, rising wages, and staff development costs is a significant challenge for FM providers.

Key Market Trends

Rise of Integrated Facility Management (IFM) Contracts

The Turkey FM industry is shifting from isolated service agreements (like separate contracts for cleaning, maintenance, or security) to Integrated Facility Management (IFM), which combines these into a single, streamlined contract. This change is driven by cost efficiency, centralized accountability, and client preferences for dealing with a single provider.

IFM reduces overall service coordination burdens and enhances service-level consistency. Many corporate and government clients report that bundling services under one provider can reduce operational expenses by up to 20%. In Turkey, IFM contracts are especially popular in the banking, healthcare, education, and infrastructure sectors, where compliance and coordination are critical.

Facilities using IFM models benefit from improved reporting, optimized manpower allocation, and better asset performance over time. These contracts often include a mix of hard (e.g., HVAC, MEP) and soft services (e.g., cleaning, security), plus value-added offerings such as energy audits, inventory tracking, and predictive maintenance scheduling. The increased demand for such comprehensive solutions is pushing

traditional single-service vendors to partner or expand into broader service offerings.

As organizations continue to focus on operational efficiency and accountability, the IFM model is emerging as the preferred contract structure. The flexibility and scalability of IFM will likely continue to attract new sectors, particularly with the rise of real estate clusters and integrated developments.

Key Market Players

Sodexo Turkey

CBRE Turkey

Compass Lojistik A.S.

Jones Lang LaSalle (JLL) Turkey

Cushman & Wakefield Turkey

Johnson Controls International

Atalian Global Services Turkey

?zak Global Holding

R?nesans Facility Management Company

EFS Middle East

Report Scope:

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

Turkey Facility Management Market, By Service:

Property

Cleaning

Security

Support

Catering

Others

Turkey Facility Management Market, By Type:

Hard Services

Soft Services

Turkey Facility Management Market, By Industry:

Organized

Unorganized

Turkey Facility Management Market, By End User:

Commercial

Residential

Industrial

Public Sector

Turkey Facility Management Market, By Region:

Marmara

Aegean

Mediterranean

Central Anatolia

Eastern Anatolia

Southeastern Anatolia

Black Sea

Competitive Landscape

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

Available Customizations:

Turkey Facility Management Market report with the given market data, TechSci 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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