

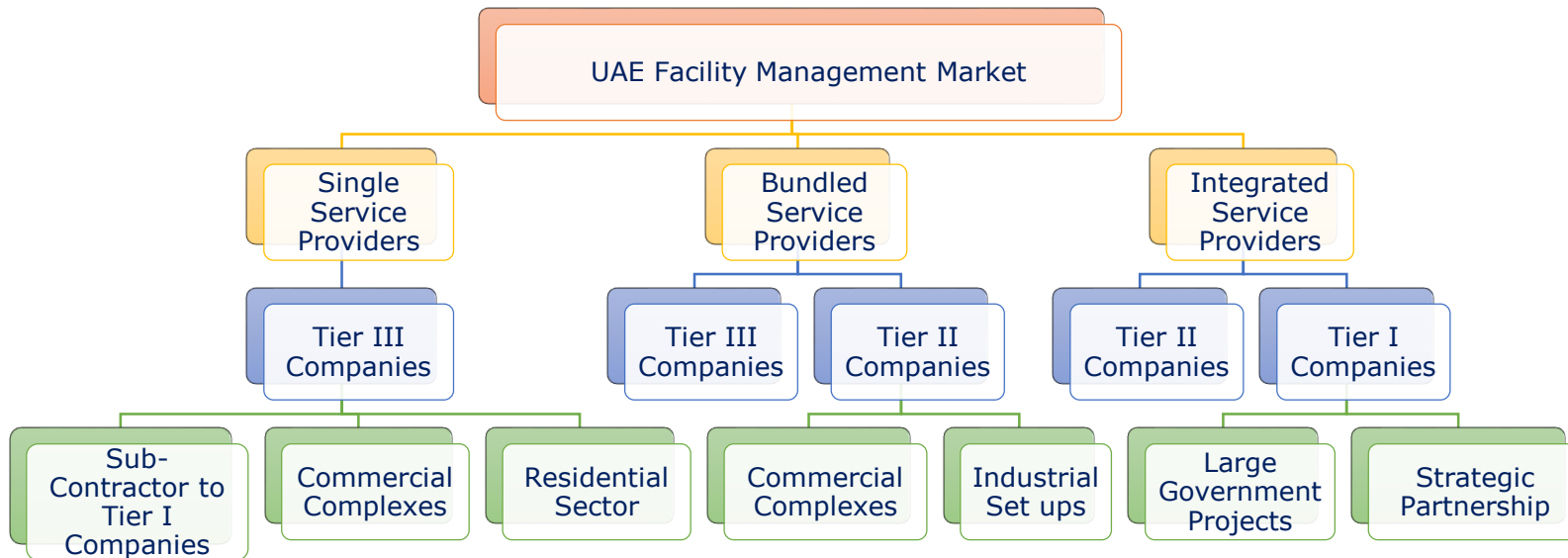
UAE Facility Management Market Analysis, 2011 - 2021



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Figure 1: UAE Facility Management Market Structure



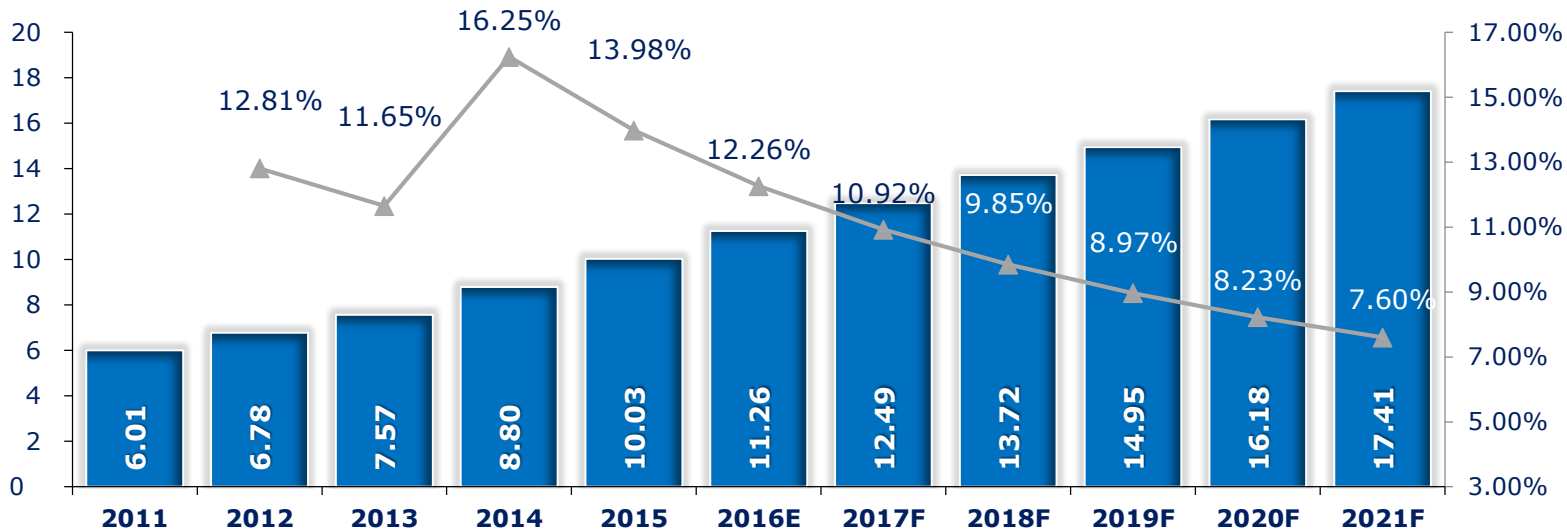
Source: TechSci Research

- ❖ **UAE facility management market can be categorized into three segments - Single Service Providers, Bundled Service Providers and Integrated Service Providers.**
- ❖ **Single service providers – usually Tier III companies, provide individual services such as cleaning, security and maintenance.**
- ❖ **Bundled service providers – include Tier II or Tier III companies, provide two or more facility management services to consumers.**
- ❖ **Integrated service providers – Tier I companies, provide almost all kinds of facility management services to public and private entities.**



UAE Facility Management Market Size, By Value

Figure 2: UAE Facility Management Market Size, By Value, 2011-2021F (USD Billion)



Source: TechSci Research

Table 1: Dubai & Sharjah Cost Index Comparison, 2015

Cost Index	Dubai (USD)	Sharjah (USD)	Difference (%)
Apartment for Rent (3 bedrooms) in City Centre	4,104.82	1,494.84	63.58%
Price per Square Meter to Buy Apartment in City Centre	4,751.53	1,558.57	67.20%
Basic Utilities (Electricity, Heating, Water, Garbage) for 85m2 Apartment	162.15	147.52	9.02%
Meal for 2 People, Mid-range Restaurant, Three-course	41.64	28.32	31.99%

Construction projects worth USD629 billion expected to be completed in UAE by 2021. Upon completion, these projects will pave the way for growth of facility management service in the country.

Source: UAE Ministry of Economy, TechSci Research



List of Facility Management Companies – UAE



Table 2: UAE List of Facility Management Companies, 2017

Company	Location	Company	Location
Etisalat Facility Management LLC	Dubai	Prime Square Technical Services LLC	Dubai
Emrill Services LLC	UAE	Green Initiative Group	Dubai
MAB Facilities Management L.L.C.	Dubai	Maxicare Facility Management Services	UAE
Interserve PLC	Dubai	OCS Group Limited	Abu Dhabi
Reliance FM	Dubai/Abu Dhabi	Serve U LLC	Dubai
Cofely Besix Mannai	Dubai/Abu Dhabi	Advanced Facility Management	Abu Dhabi
Berkeley Services Group	Dubai/Abu Dhabi	Adeeb Group	Abu Dhabi
Idama Facilities Management Solutions	Dubai	Transguard Group	Dubai
Imdaad	Dubai	CLEANING & MAINTENANCE CENTER L.L.C. [CMC]	Dubai
EFS Facilities Services	Dubai	Duserve Facilities Management	UAE
Macro Limited	Dubai	ETA Facility Management	Dubai
United Facilities Management	Dubai	EMCC LLC	4 Emirates
Farnek Services LLC	4 Emirates	Census International	Abu Dhabi
Khidmah LLC.	UAE	Delight Facility Management LLC	Abu Dhabi
Al Shirawi Facilities Management LLC	Dubai	MKO facility Management LLC	Dubai
Qurum business Group (QBG)	Dubai	Inaya Facility Management	Dubai
Chicago Maintenance & Construction Co. (LLC)	Dubai	Al-Futtaim Engineering Company LLC	UAE
Deeyar Facilities Management LLC	UAE	Arabian Integrated FM	Abu Dhabi
Khansaheb Civil Engineering LLC	Dubai		

Source: TechSci Research



List of Facility Management Companies – UAE

Table 2: UAE List of Facility Management Companies, 2017 Contd.

Company	Location
Emirates International Facility Management LLC (EIFM)	Abu Dhabi
HTS Facility Management LLC	UAE
One Touch Technical Services LLC	Dubai
Abu Hasan Technical Works L.L.C	Dubai
GDG Technical Services LLC.	UAE
Tool Time LLC	UAE
OnTime Facilities Management	Dubai
Zamil Operation & Maintenance	Dubai
BK Gulf LLC	Dubai
Handyman Facilities Management LLC	Dubai
Join Tech Facility Management Services	Abu Dhabi
Megaton Facility Management	Abu Dhabi
Al Arabia Operation & Maintenance LLC	Dubai
IWIN Electrical & Plumbing Works LLC	Dubai

Source: TechSci Research

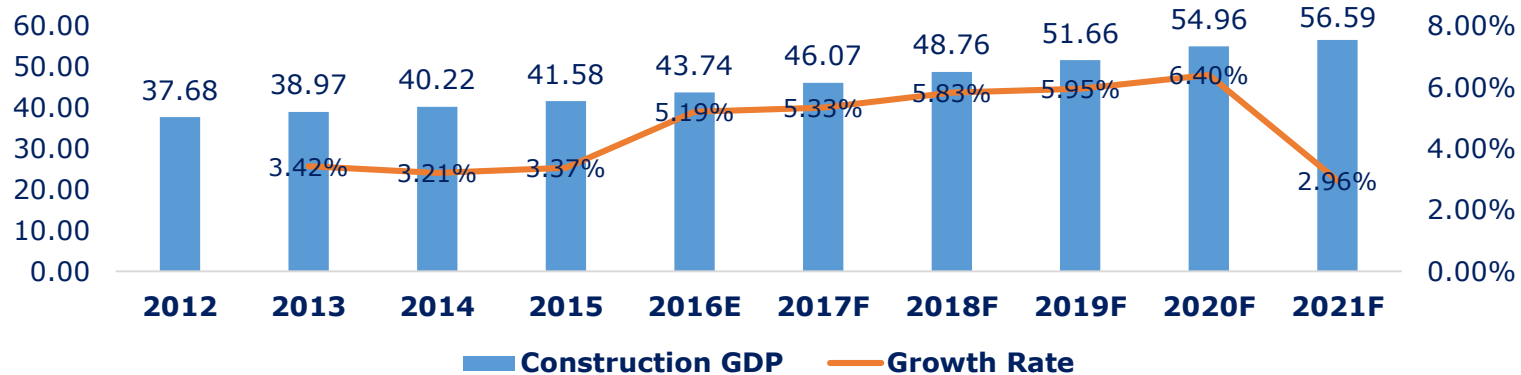
✦ **UAE facility management market expected to consolidate as Tier-I and Tier-II companies expand further through merger and acquisitions. For instance, In 2017, UAE-based facilities management (FM) provider, Imdaad announced investment of USD16 million for the acquisition of small players.**

✦ **Facility management companies would be driven by user's need to avail multiple services, prompting companies to offer integrated and customized facility management solutions.**



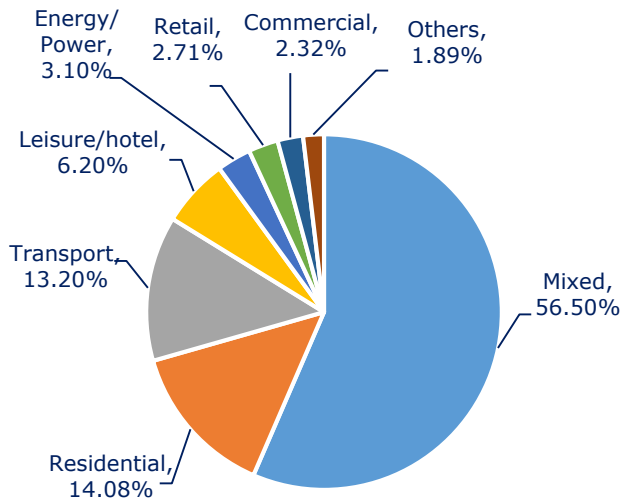
UAE Construction Sector is on a Spending Spree

Figure 3: UAE Construction Sector Spending, 2012-2021F (USD Billion)



Source: UAE Ministry of Economy, TechSci Research

Figure 4: Dubai Construction Projects in Execution & Planning Stage, By Type of Project, 2016



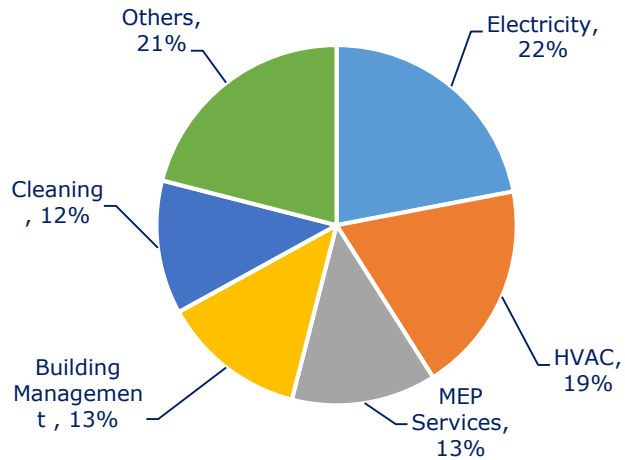
Source: UAE Ministry of Economy, TechSci Research

- ❖ **Dubai Expo 2020 to act as major driver in growth of construction projects in Dubai region.**
- ❖ **Around USD9.40 billion to be spent for development of multiple expo complexes in the region.**
- ❖ **Abu Dhabi Urban Planning Council plans to construct low-cost housing facility in the region would also boost the construction of residential projects in the region.**



Drivers for Facility Management

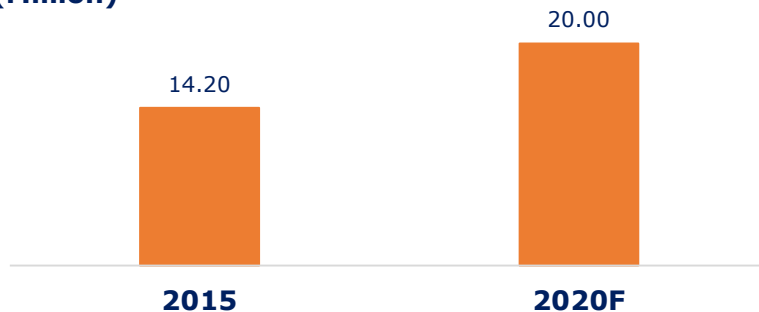
Figure 5: UAE Distribution of Grade A Offices' Operation Cost Per Annum, 2016



Source: TechSci Research

Ongoing efforts by UAE to diversify its economy, from conventional crude-oil export to service-sector driven economy would aid in construction of commercial centres and other mixed-use projects which will boost demand for facility management services.

Figure 6: Number of Tourists in Dubai, 2015 & 2020F (Million)



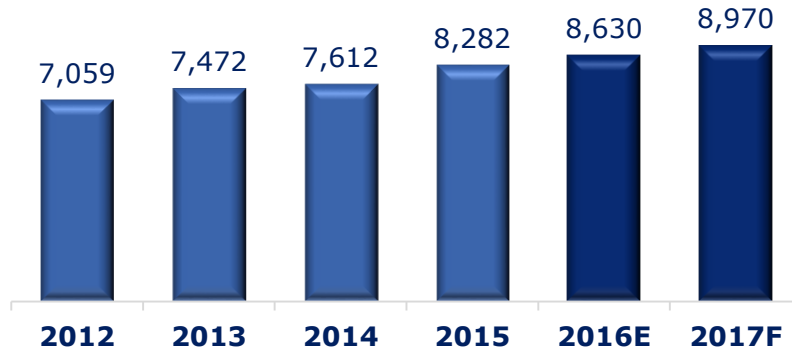
Source: TechSci Research

Combined valuation from tourism and aviation activities in Dubai set to reach USD53.10 billion by 2020. This would encourage need for facility management services in upcoming tourism and leisure projects in the region.



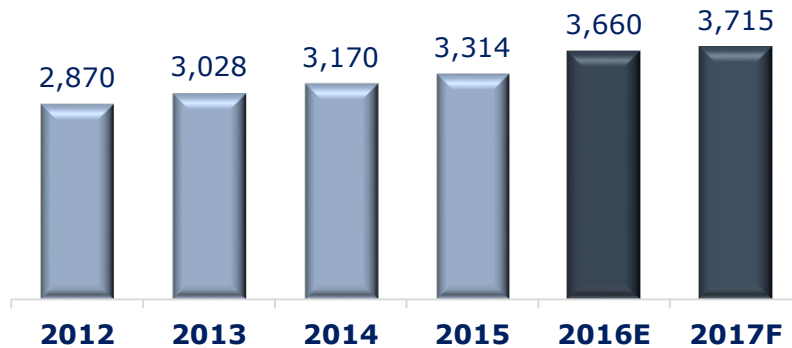
UAE Office Space Supply Outlook

Figure 7: Dubai Gross Leasable Office Area Estimates, 2012-2017F (Thousand Square Meter)



Source: Ministry of Infrastructure Development

Figure 8: Abu Dhabi Gross Leasable Office Area Estimates, 2012-2017F (Thousand Square Meter)



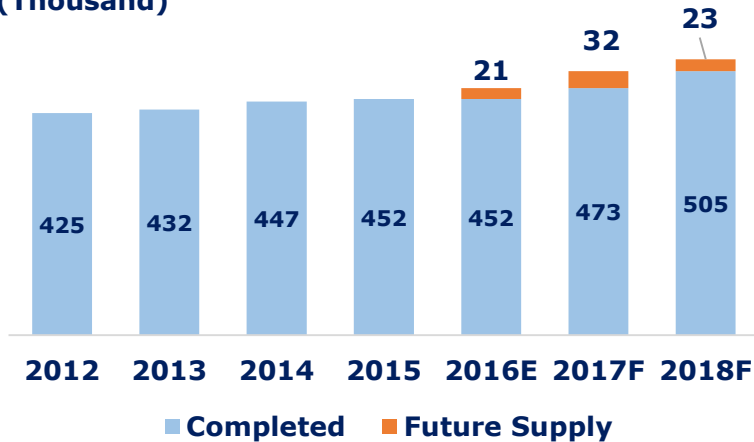
Source: Ministry of Infrastructure Development

Rising Delivery of Office Spaces in Dubai & Abu Dhabi is projected to surge demand for facility management services.



UAE Residential Supply Outlook

Figure 9: Dubai Residential House Supply, 2012-2018F
(Thousand)



Source: Ministry of Infrastructure Development

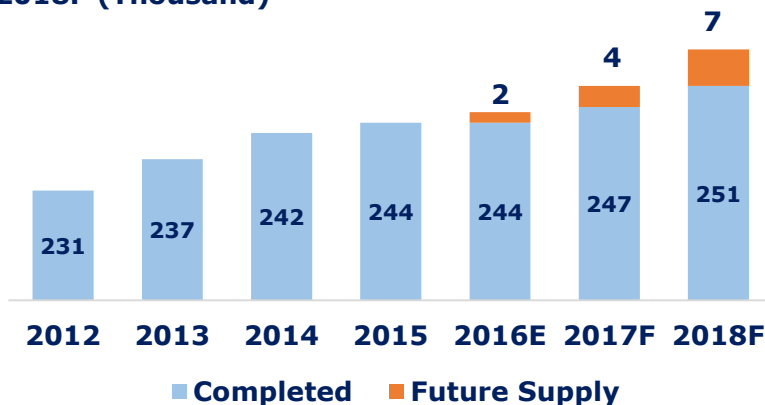
Development plans linked with Dubai Expo 2020 would result in influx of tourist and worker population in Dubai, prompting need for housing projects.

In 2015, Abu Dhabi Urban Planning Council (UPC) approved 26 property projects covering gross floor area of 2.3 million square meters.

Abu Dhabi General Services Company (Musnada) would invest USD643 million in development of residential plots, mosques and schools in the region.

Upcoming property projects are expected to surge the demand for facility management services in Dubai and Abu Dhabi's residential sector.

Figure 10: Abu Dhabi Residential House Supply, 2012-2018F
(Thousand)

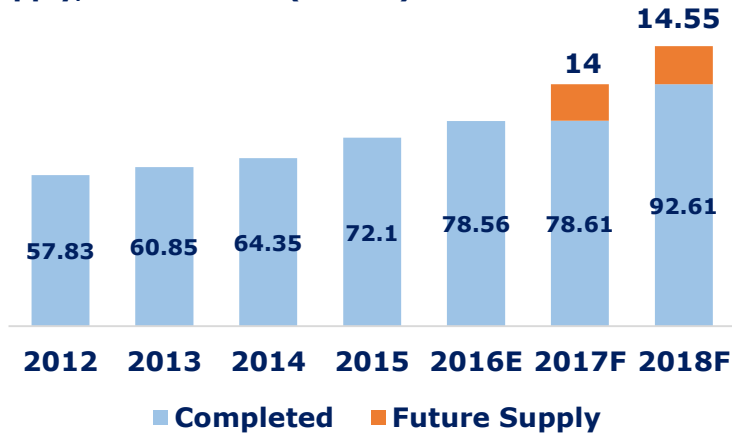


Source: Ministry of Infrastructure Development



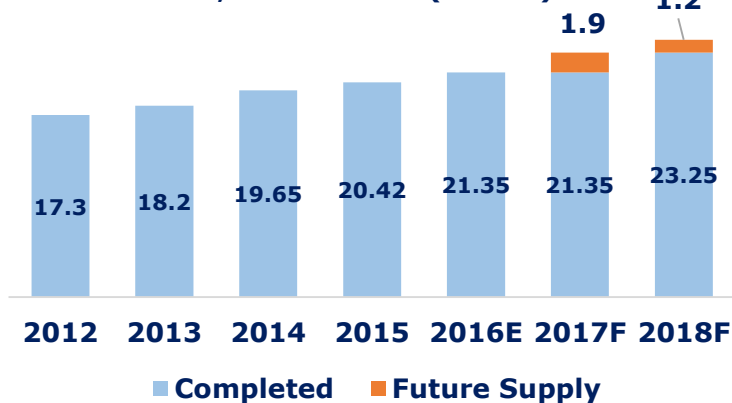
UAE Hotel Supply Outlook

Figure 11: Dubai Total Number of Hotel Room Supply, 2012-2018F (Million)



Source: Ministry of Infrastructure Development

Figure 12: Abu Dhabi Total Number of Hotel Room Estimates, 2012-2018F (Million)



Source: Ministry of Infrastructure Development

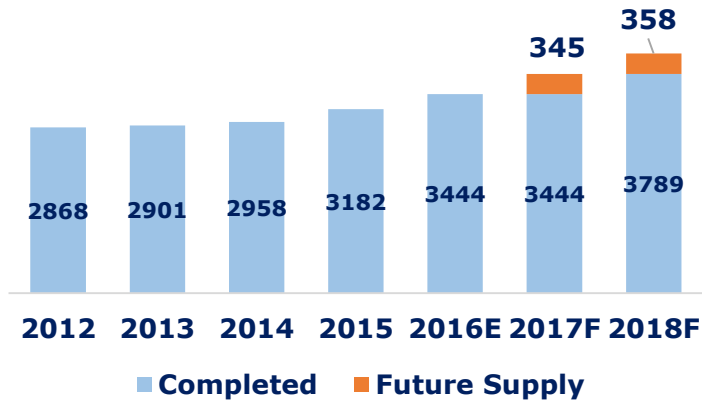
According to World Travel & Tourism Council (WTTC), contribution of tourism sector in UAE's GDP is set to reach USD64.47 billion by 2026, up from USD36.43 billion in 2015. This would offer huge opportunity for tourism related development projects across the country.

Dubai Tourism Vision 2020 and Abu Dhabi Vision 2030 aim to promote tourism sector by encouraging investment in development of hotels, resorts, tourist centres etc., thereby fuelling the need for facility management services in UAE.



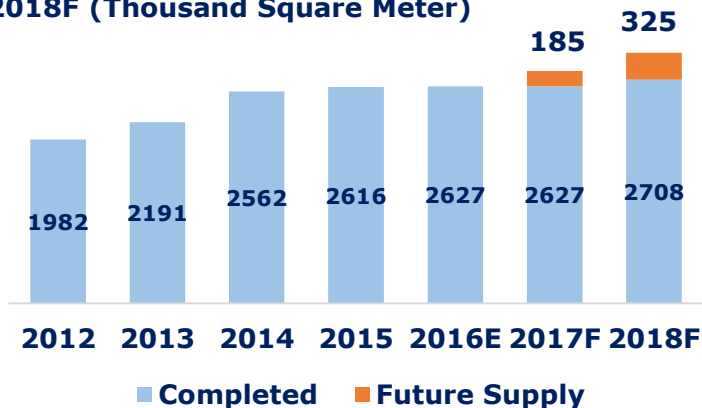
UAE Retail Space Outlook

Figure 13: Dubai Total Retail Space, 2012-2018F (Thousand Square Meter)



Source: Ministry of Infrastructure Development

Figure 14: Abu Dhabi Total Retail Space, 2012-2018F (Thousand Square Meter)



Source: Ministry of Infrastructure Development

- UAE's retail sector will expand from USD56.6 billion in 2016 to USD71 billion by 2021, thereby fuelling development of malls, retail shops etc.
- Dubai set to emerge as a prime location for shopping globally and aims to attract investment worth USD4 billion by 2017 for development of retail centres.
- Abu Dhabi's retail sector is expected to grow at a rapid pace owing to strong domestic demand for luxury goods and constant inflow of tourists, which would result in addition of retail space, thereby offering business opportunities for facility management service providers in the region.



UAE Upcoming Hotel Projects

Table 3: UAE Upcoming Hotel Projects, By Project Type & City, As of September 2016

Project Name	Project Type	City	Completion Date
Tin Hotel	Hotel	Dubai	1-Dec-19
Chototel Hotel	Hotel	Dubai	1-Nov-18
Forever Rose Hotel	Hotel Apartments	Dubai	1-Dec-20
Blue Diamond	Hotel	Fujairah	1-Nov-18
Vida Town Square	Hotel	Dubai	1-Feb-18
Firdous Sobha	Resort	Umm Al Quwain	1-Dec-19
Novotel Hotel	Hotel	Dubai	1-Dec-18
Hotel Apartments Building at Plot No. 196 - Al Mujarrah	Hotel Apartments	Sharjah	1-Jun-19
Premier Inn	Hotel	Dubai	1-Dec-17
Lemon Tree Hotel	Hotel	Abu Dhabi	1-May-19
Hotel Apartments - Jumeirah Village Circle (JVC)	Hotel Apartments	Dubai	1-Sep-18
Hotel Building - Mall of the Emirates	Hotel	Dubai	1-Nov-18
Hotel Building - Dubai Media City	Hotel	Dubai	1-Nov-18

Source: Ministry Of Infrastructure Development



UAE Upcoming Hotel Projects

Table 3: UAE Upcoming Hotel Projects, By Project Type & City, As of September 2016 Contd.

Project Name	Project Type	City	Completion Date
Manazel New Development	Hotel	Abu Dhabi	1-Jul-19
Business Hotel - Business Park - Khalifa Industrial Zone Abu Dhabi (KIZAD)	Hotel Apartments	Abu Dhabi	17-Jul-18
The Link - Dubai Motor City	Hotel	Dubai	31-May-19
Hotel Building - Al Maryah Island	Hotel	Abu Dhabi	1-Apr-19
Marina Rise Tower - C2 - Reem Island	Hotel	Abu Dhabi	1-Dec-18
4 Star Hotel - Rashid Hospital Expansion	Hotel	Dubai	1-Dec-17
5 Star Hotel - Rashid Hospital Expansion	Hotel	Dubai	1-Dec-18
Ras Al Khaimah Marriott Resort	Resort	Ras Al Khaimah	12-Jun-19
Eagle Hills Towers - Jumeirah Beach Residence	Hotel Apartments	Dubai	1-Feb-18
Dusit Hotel - Sharjah Waterfront City	Hotel	Sharjah	1-Feb-19
Shaza Hotel - Sharjah Waterfront City	Hotel	Sharjah	1-Feb-19



UAE Upcoming Commercial Projects



Table 4: UAE Ongoing/Upcoming Commercial Projects, As of October 2016

List of Ongoing/Upcoming Commercial Projects			
Project Name	Region	Cost of Project (USD Million)	Estimated Completion Date
Al Maryah Mall	Abu Dhabi	1,000	2018
Dubai Parks and Resorts	Dubai	2,800	2020
Blue Water Islands	Dubai	1,600	2018
Sharjah retail complex	Sharjah	56.70	2021
Museum of the Future	Dubai	200	2017
Mall of the World	Dubai	6,750	2020
Sharjah Waterfront City	Sharjah	5,450	2018
Sir Bu Nair Island project	Sharjah	135	2017
Mohammed Bin Rashid Al Maktoum (MBR) City – District One	Dubai	10,000	2017
Jumeirah Central project	Dubai	19,818	2021

Source: MEED Projects, TechSci Research





Drivers and Challenges

Drivers

Growing Focus Towards Green Buildings

Increasing Number of
Construction Projects

Booming Population

Upcoming Mega-Events Such as Dubai
Expo 2020

Challenges

Lack of Awareness

Lack of Skilled Workforce

Low Margins



Growing Focus on Sustainability

Technology Integration

Integration of Facility Management in Building Designs

Booming Internet of Things (IoT) Market

Increasing Focus on Outsourcing

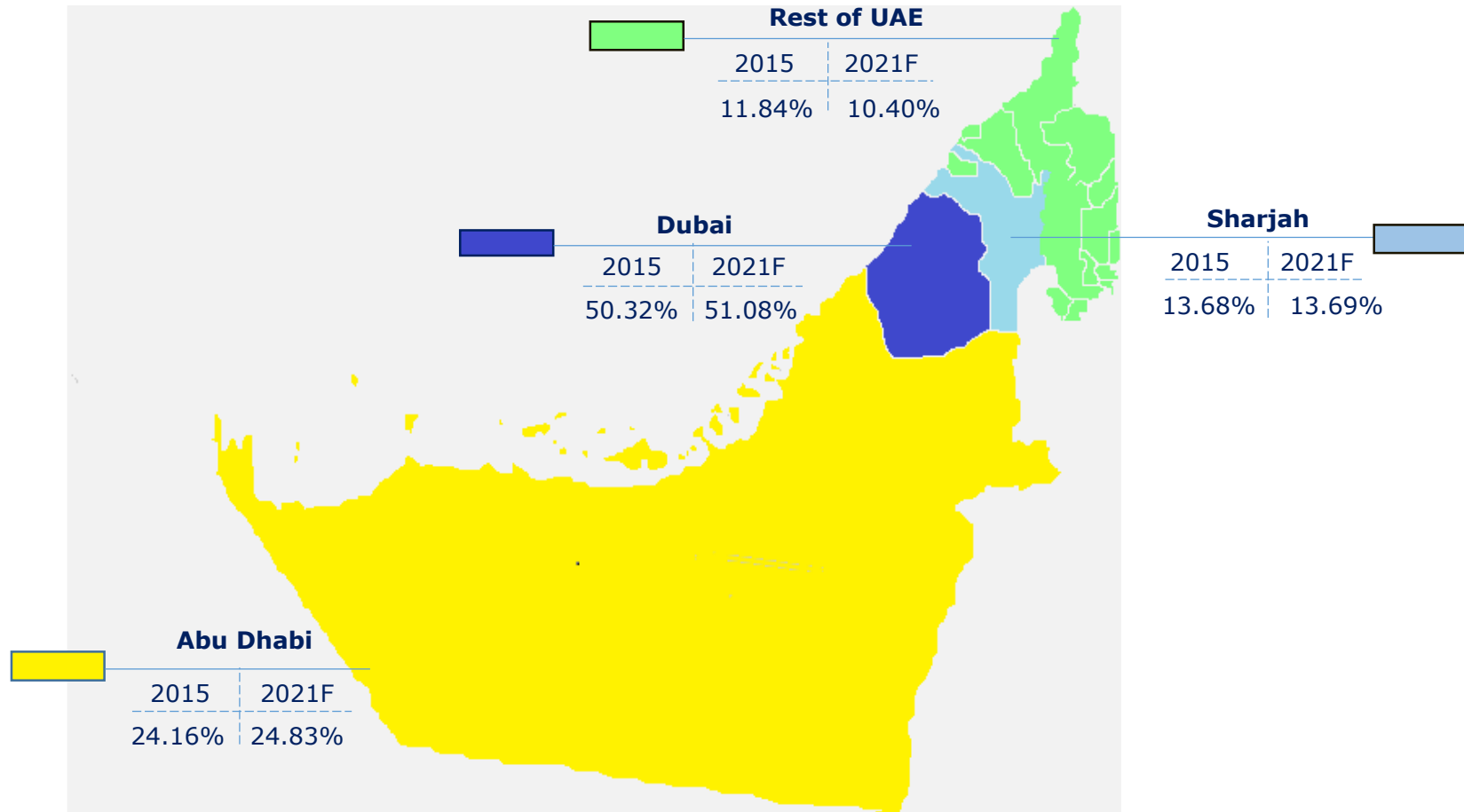




UAE Facility Management Market Share, By Region

Figure 15: UAE Facility Management Market Share, By Region, By Value, 2015 & 2021F

Developments pertaining to Dubai Expo 2020 is expected to generate ample opportunities for facility management services in Dubai through 2021



Rest of UAE include Ajman, Fujairah, Ras al-Khaimah and Umm al-Qaiwain
Source: TechSci Research



Dubai Expo 2020 to Drive UAE Facility Management Market

- ❖ *Millions of visitors are anticipated to visit the country for Dubai Expo 2020. In order to bring the country to the forefront, Government of UAE is continuously upgrading its commercial as well as tourism sectors.*
- ❖ *In 2016, construction projects worth USD155 billion were under execution in the country, and projects worth USD629 billion are slated for completion by 2021. Post completion, these projects are expected to boost demand for facility management services in the country.*
- ❖ *In order to host the mega-event, an estimated USD9.40 billion would be required for building multiple expo complexes across an area of 438 hectares.*

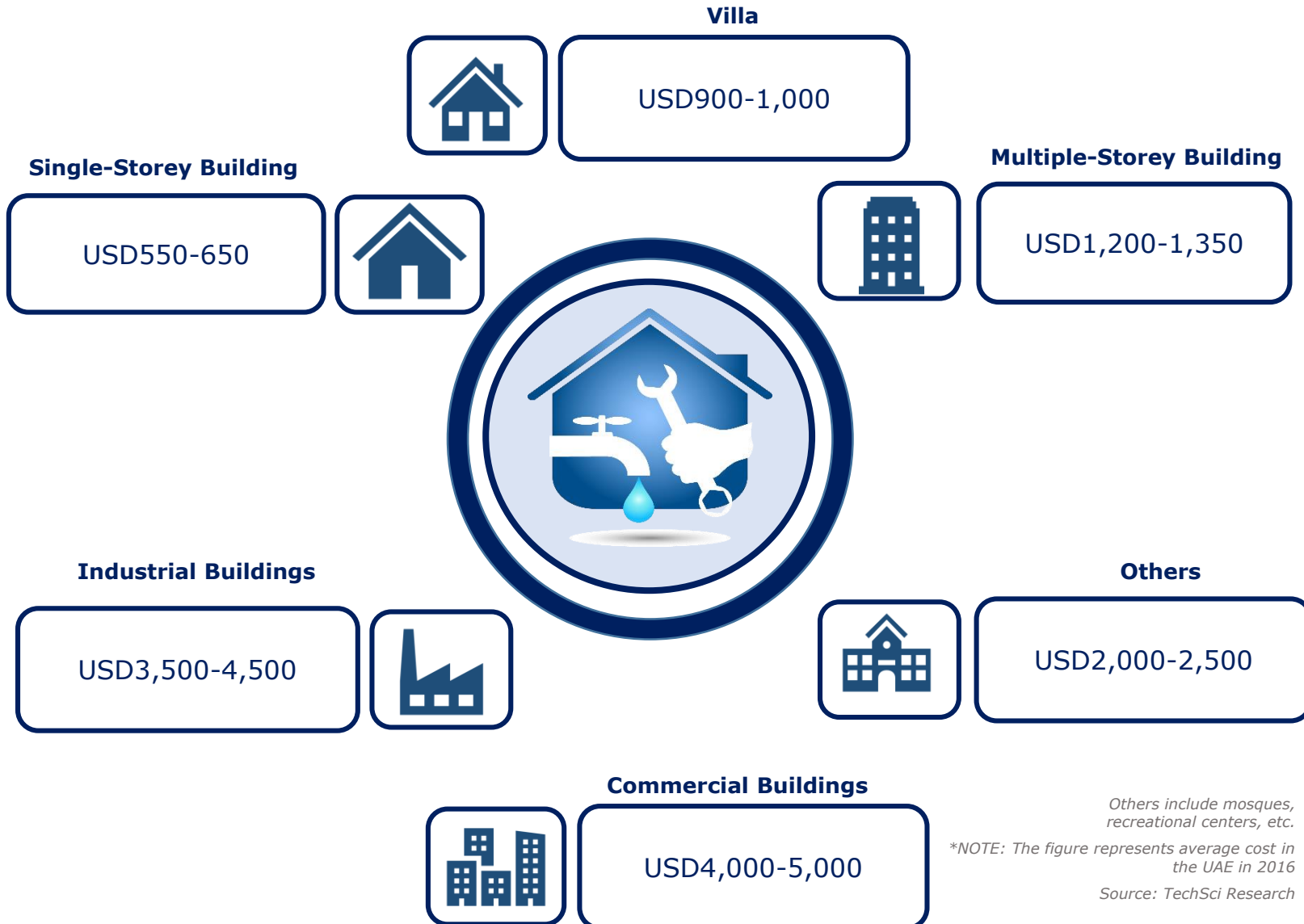


- **Expected Participation of 180 Nations and International Companies**
- **Employment Opportunities for 277,150 personnel during 2013-2021**



Cost of Spending in UAE – Plumbing

Figure 16: UAE Average Annual Spending on Plumbing, By Type of Building, 2016* (USD)



Others include mosques, recreational centers, etc.

*NOTE: The figure represents average cost in the UAE in 2016

Source: TechSci Research



Cost of Spending in UAE – Painting

Figure 17: UAE Average Annual Spending on Painting, By Type of Building, 2016* (USD)



Others include mosques, recreational centers, etc.

*NOTE: The figure represents average cost in the UAE in 2016

Source: TechSci Research



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