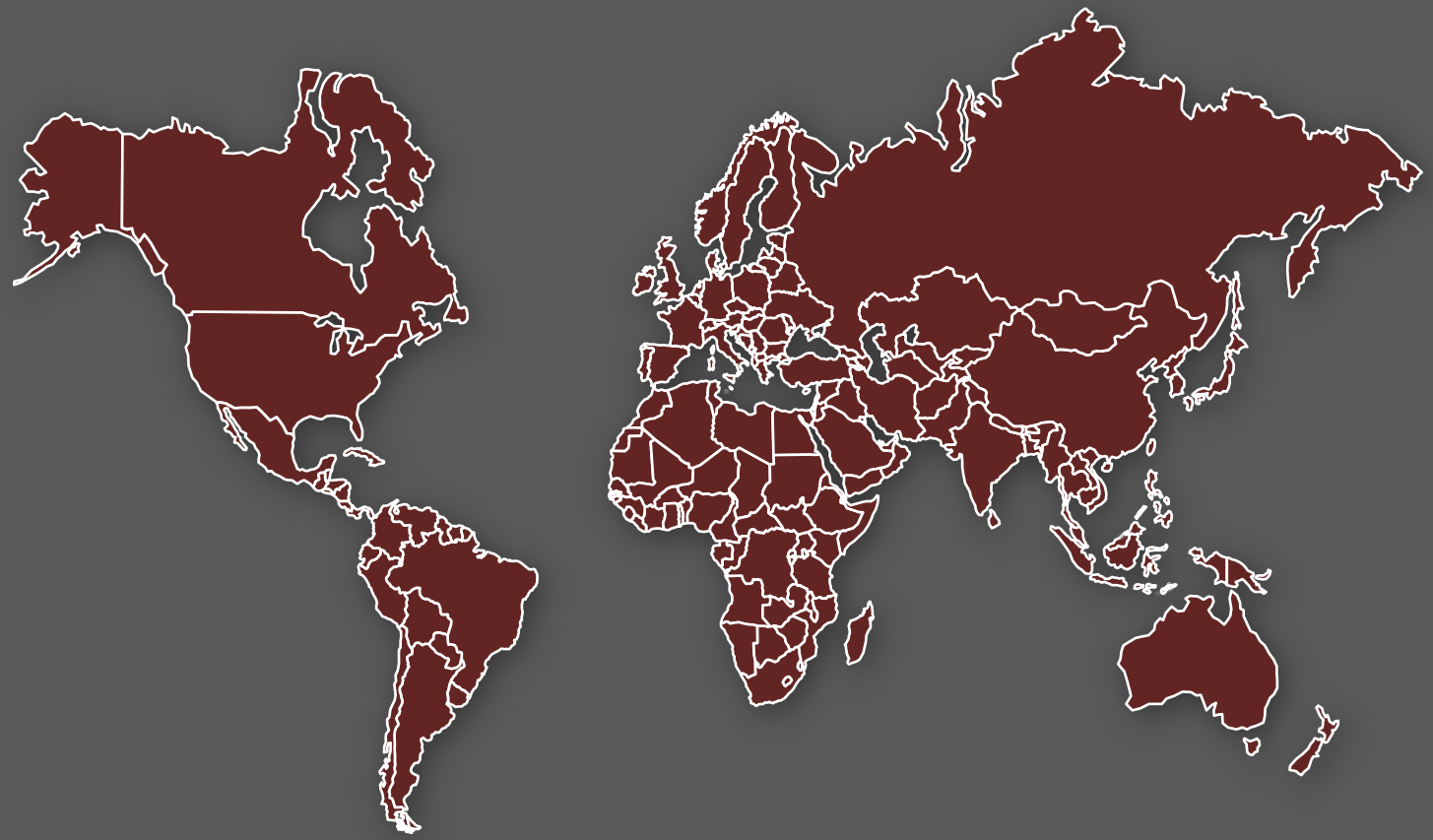
Kentley Insights

2026 Global Market Size & Growth Report

Specialized Design Services



October 2026

Report: 5414

SPECIALIZED DESIGN SERVICES
GLOBAL MARKET SIZE & GROWTH REPORT

Kentley Insights

The global Specialized Design Services market is forecast at $130.5 billion in 2026, up 8.6% from 2025, and projected to reach $150.2 billion by 2030, a 3.6% CAGR. The largest markets are the United States, China, and Japan. Africa & Middle East is the fastest-growing region at 4.9% a year. The report covers market size, growth, and share for 4 regions, 22 subregions, and 195 countries from 2014 to 2030, in millions of US dollars. Also referred to as design services, design agencies, creative design services, and design consultancies.

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Mali
Burkina Faso
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Liberia
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United Arab Emirates
Israel
Iraq
Qatar
Kuwait
Oman
Lebanon
Jordan
Bahrain
Yemen
Syria
Palestine

EASTERN AFRICA (p. 34)
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Ethiopia
Tanzania
Uganda
Zambia
Zimbabwe
Mozambique
Mauritius
Madagascar
Rwanda
Malawi
Eritrea
Burundi
Djibouti
Seychelles
Somalia

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SPECIALIZED DESIGN SERVICES
GLOBAL MARKET SIZE & GROWTH REPORT

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REPORT METHODOLOGY

The methodology in developing country, regional and global revenue figures utilizes in-depth survey results on companies in the specialized design services industry combined with additional country-specific metadata. Forecasts are based on proprietary econometric models accounting for industry, product, regional, and macro trends and dynamics. Data sources include the Census Bureau, Bureau of Economic Analysis, United Nations, and World Bank. For the report data in Excel visit us at www.kentleyInsights.com/data

INDUSTRY DEFINITION

Companies that provide specialized design services other than architectural, engineering, and computer systems design. The group covers interior design, industrial design, graphic design, and other specialized design such as fashion, jewelry, and textile design. Also referred to as design services, design agencies, creative design services, and design consultancies.

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SPECIALIZED DESIGN SERVICES
GLOBAL & MAJOR REGIONS

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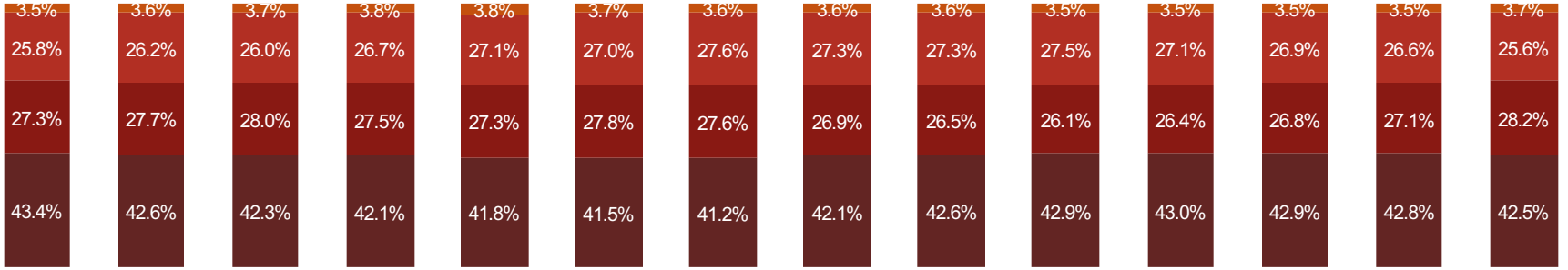
The global Specialized Design Services market size is forecast at $130.5 billion in 2026, up 8.6% from 2025, and projected to reach $150.2 billion by 2030, a 3.6% CAGR. Largest region: The Americas (43% of 2026 sales).

WORLDWIDE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	72,015	79,523	84,751	86,813	88,860	96,312	97,437	94,451	105,359	110,362	115,856	120,160	130,463	150,191
Market Growth (%)		10.4%	6.6%	2.4%	2.4%	8.4%	1.2%	-3.1%	11.5%	4.7%	5.0%	3.7%	8.6%	3.6%

GLOBAL MARKET SHARE BY REGION



Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
THE AMERICAS	31,246	33,875	35,811	36,581	37,126	39,953	40,173	39,763	44,875	47,390	49,835	51,504	55,886	63,840
ASIA & OCEANIA	19,631	21,988	23,691	23,835	24,283	26,748	26,862	25,452	27,967	28,857	30,576	32,182	35,326	42,323
EUROPE	18,597	20,815	22,076	23,136	24,038	26,009	26,852	25,813	28,736	30,300	31,443	32,265	34,665	38,466
AFRICA & MIDDLE EAST	2,541	2,844	3,173	3,260	3,412	3,602	3,549	3,423	3,782	3,815	4,002	4,209	4,586	5,562

Market Growth (%)													
THE AMERICAS	8.4%	5.7%	2.2%	1.5%	7.6%	0.6%	-1.0%	12.9%	5.6%	5.2%	3.3%	8.5%	3.4%
ASIA & OCEANIA	12.0%	7.7%	0.6%	1.9%	10.2%	0.4%	-5.2%	9.9%	3.2%	6.0%	5.3%	9.8%	4.6%
EUROPE	11.9%	6.1%	4.8%	3.9%	8.2%	3.2%	-3.9%	11.3%	5.4%	3.8%	2.6%	7.4%	2.6%
AFRICA & MIDDLE EAST	11.9%	11.6%	2.8%	4.7%	5.6%	-1.5%	-3.6%	10.5%	0.9%	4.9%	5.2%	9.0%	4.9%

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SPECIALIZED DESIGN SERVICES
THE AMERICAS

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NORTH AMERICA
United States
Canada
Bermuda
Greenland

SOUTH AMERICA
Brazil
Argentina
Colombia
Chile
Peru
Venezuela
Ecuador
Uruguay
Paraguay
Bolivia
French Guiana
Guyana
Suriname

CENTRAL AMERICA
Mexico
Guatemala
Panama
Costa Rica
El Salvador
Honduras
Nicaragua
Belize

CARIBBEAN
Puerto Rico
Cuba
Dominican Republic
Trinidad and Tobago
Jamaica
The Bahamas
Guadeloupe
Haiti
Martinique
Cayman Islands
Barbados
Virgin Islands
Aruba
Curaçao
St Lucia
Antigua and Barbuda
British Virgin Islands
Grenada
Turks and Caicos Islands
St Kitts and Nevis
Sint Maarten (Dutch)
Saint Martin (French)
St Vincent & Grenadines
Dominica
Anguilla

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SPECIALIZED DESIGN SERVICES
THE AMERICAS

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The Americas Specialized Design Services market size is forecast at $55.9 billion in 2026, up 8.5% from 2025, and projected to reach $63.8 billion by 2030, a 3.4% CAGR. Largest subregion: North America (90% of 2026 sales).

THE AMERICAS MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	31,246	33,875	35,811	36,581	37,126	39,953	40,173	39,763	44,875	47,390	49,835	51,504	55,886	63,840
Market Growth (%)		8.4%	5.7%	2.2%	1.5%	7.6%	0.6%	-1.0%	12.9%	5.6%	5.2%	3.3%	8.5%	3.4%

THE AMERICAS MARKET SIZE BY SUBREGION

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
NORTH AMERICA	27,661	29,989	31,810	32,533	33,038	35,657	36,385	35,756	40,350	42,629	44,850	46,339	50,282	57,336
SOUTH AMERICA	2,687	2,881	2,944	2,960	2,950	3,060	2,576	2,850	3,225	3,403	3,561	3,701	4,020	4,672
CENTRAL AMERICA	591	671	711	733	768	837	826	813	906	954	996	1,025	1,112	1,288
CARIBBEAN	306	334	346	355	370	399	387	344	394	404	427	438	472	544

Market Growth (%)														
NORTH AMERICA		8.4%	6.1%	2.3%	1.6%	7.9%	2.0%	-1.7%	12.8%	5.6%	5.2%	3.3%	8.5%	3.3%
SOUTH AMERICA		7.2%	2.2%	0.5%	-0.3%	3.7%	-15.8%	10.6%	13.1%	5.5%	4.7%	3.9%	8.6%	3.8%
CENTRAL AMERICA		13.6%	6.0%	3.0%	4.7%	9.1%	-1.3%	-1.7%	11.5%	5.3%	4.5%	2.9%	8.4%	3.7%
CARIBBEAN		9.0%	3.5%	2.8%	4.2%	7.8%	-3.2%	-11.0%	14.7%	2.5%	5.5%	2.6%	7.8%	3.6%

Market Share (%)														
NORTH AMERICA	88.5%	88.5%	88.8%	88.9%	89.0%	89.2%	90.6%	89.9%	89.9%	90.0%	90.0%	90.0%	90.0%	89.8%
SOUTH AMERICA	8.6%	8.5%	8.2%	8.1%	7.9%	7.7%	6.4%	7.2%	7.2%	7.2%	7.1%	7.2%	7.2%	7.3%
CENTRAL AMERICA	1.9%	2.0%	2.0%	2.0%	2.1%	2.1%	2.1%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%	2.0%
CARIBBEAN	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	1.0%	0.9%	0.9%	0.9%	0.9%	0.8%	0.8%	0.9%

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SPECIALIZED DESIGN SERVICES
NORTH AMERICA

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The North America Specialized Design Services market size is forecast at $50.3 billion in 2026, up 8.5% from 2025, and projected to reach $57.3 billion by 2030, a 3.3% CAGR.
Largest market: United States (96% of 2026 sales).

NORTH AMERICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	27,661	29,989	31,810	32,533	33,038	35,657	36,385	35,756	40,350	42,629	44,850	46,339	50,282	57,336
Market Growth (%)		8.4%	6.1%	2.3%	1.6%	7.9%	2.0%	-1.7%	12.8%	5.6%	5.2%	3.3%	8.5%	3.3%

NORTH AMERICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
United States	26,256	28,504	30,120	30,873	31,459	33,947	34,682	34,074	38,558	40,760	42,898	44,330	48,117	54,907
Canada	1,395.4	1,474.3	1,678.6	1,648.6	1,567.9	1,698.1	1,692.3	1,671.6	1,780.4	1,857.1	1,939.7	1,996.7	2,151.3	2,413.7
Bermuda	7.9	9.0	9.4	9.4	9.1	9.5	8.0	8.4	9.0	9.5	10.0	10.3	11.2	12.7
Greenland	2.2	2.0	2.1	2.1	1.9	2.0	2.1	2.0	2.2	2.3	2.4	2.5	2.7	3.0

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
United States	8.6%	5.7%	2.5%	1.9%	7.9%	2.2%	-1.8%	13.2%	5.7%	5.2%	3.3%	8.5%	3.4%
Canada	5.7%	13.9%	-1.8%	-4.9%	8.3%	-0.3%	-1.2%	6.5%	4.3%	4.4%	2.9%	7.7%	2.9%
Bermuda	13.6%	4.7%	0.0%	-2.9%	4.4%	-15.8%	4.7%	8.0%	5.4%	5.2%	3.2%	7.8%	3.3%
Greenland	-7.0%	3.2%	-1.6%	-6.6%	2.7%	3.2%	-2.0%	10.6%	5.4%	3.9%	2.4%	7.4%	2.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
United States	94.9%	95.0%	94.7%	94.9%	95.2%	95.2%	95.3%	95.3%	95.6%	95.6%	95.6%	95.7%	95.7%	95.8%
Canada	5.0%	4.9%	5.3%	5.1%	4.7%	4.8%	4.7%	4.7%	4.4%	4.4%	4.3%	4.3%	4.3%	4.2%
Bermuda	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Greenland	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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SPECIALIZED DESIGN SERVICES
SOUTH AMERICA

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The South America Specialized Design Services market size is forecast at $4.0 billion in 2026, up 8.6% from 2025, and projected to reach $4.7 billion by 2030, a 3.8% CAGR.
Largest market: Brazil (45% of 2026 sales).

SOUTH AMERICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	2,687	2,881	2,944	2,960	2,950	3,060	2,576	2,850	3,225	3,403	3,561	3,701	4,020	4,672
Market Growth (%)		7.2%	2.2%	0.5%	-0.3%	3.7%	-15.8%	10.6%	13.1%	5.5%	4.7%	3.9%	8.6%	3.8%

SOUTH AMERICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Brazil	1,126.4	1,193.3	1,217.8	1,230.2	1,243.7	1,270.8	1,103.4	1,241.1	1,409.9	1,511.2	1,599.5	1,656.1	1,791.0	2,054.0
Argentina	516.3	558.0	579.3	584.6	572.1	579.5	362.0	446.0	510.5	513.7	519.6	548.9	602.4	729.4
Colombia	163.8	173.4	176.2	173.5	178.4	192.1	181.4	182.4	204.8	204.6	212.6	220.8	239.6	279.2
Chile	397.2	448.2	484.1	500.1	510.3	558.2	499.3	519.1	586.9	625.5	657.1	680.3	739.1	852.0
Peru	80.4	90.3	96.5	98.5	101.1	110.5	91.5	97.9	104.9	105.3	111.5	116.7	127.3	148.4
Venezuela	209.6	208.1	175.4	142.6	109.7	91.8	85.5	93.8	104.6	113.4	122.2	125.5	138.3	166.8
Other Countries	193.6	209.5	214.8	230.5	234.7	256.7	252.9	269.8	303.0	329.5	338.9	353.1	382.0	442.6

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Brazil	5.9%	2.1%	1.0%	1.1%	2.2%	-13.2%	12.5%	13.6%	7.2%	5.8%	3.5%	8.1%	3.5%
Argentina	8.1%	3.8%	0.9%	-2.1%	1.3%	-37.5%	23.2%	14.5%	0.6%	1.1%	5.6%	9.7%	4.9%
Colombia	5.9%	1.6%	-1.5%	2.8%	7.6%	-5.6%	0.6%	12.3%	-0.1%	3.9%	3.8%	8.5%	3.9%
Chile	12.8%	8.0%	3.3%	2.0%	9.4%	-10.6%	4.0%	13.1%	6.6%	5.0%	3.5%	8.6%	3.6%
Peru	12.3%	6.8%	2.1%	2.6%	9.3%	-17.2%	7.0%	7.2%	0.4%	5.9%	4.6%	9.0%	3.9%
Venezuela	-0.7%	-15.7%	-18.7%	-23.1%	-16.3%	-6.9%	9.8%	11.5%	8.4%	7.7%	2.7%	10.2%	4.8%
Other Countries	8.2%	2.5%	7.3%	1.9%	9.3%	-1.5%	6.7%	12.3%	8.7%	2.9%	4.2%	8.2%	3.8%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Brazil	41.9%	41.4%	41.4%	41.6%	42.2%	41.5%	42.8%	43.5%	43.7%	44.4%	44.9%	44.7%	44.6%	44.0%
Argentina	19.2%	19.4%	19.7%	19.8%	19.4%	18.9%	14.1%	15.6%	15.8%	15.1%	14.6%	14.8%	15.0%	15.6%
Colombia	6.1%	6.0%	6.0%	5.9%	6.0%	6.3%	7.0%	6.4%	6.4%	6.0%	6.0%	6.0%	6.0%	6.0%
Chile	14.8%	15.6%	16.4%	16.9%	17.3%	18.2%	19.4%	18.2%	18.2%	18.4%	18.5%	18.4%	18.4%	18.2%
Peru	3.0%	3.1%	3.3%	3.3%	3.4%	3.6%	3.6%	3.4%	3.3%	3.1%	3.1%	3.2%	3.2%	3.2%
Venezuela	7.8%	7.2%	6.0%	4.8%	3.7%	3.0%	3.3%	3.3%	3.2%	3.3%	3.4%	3.4%	3.4%	3.6%
Other Countries	7.2%	7.3%	7.3%	7.8%	8.0%	8.4%	9.8%	9.5%	9.4%	9.7%	9.5%	9.5%	9.5%	9.5%

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SPECIALIZED DESIGN SERVICES
CENTRAL AMERICA

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The Central America Specialized Design Services market size is forecast at $1.1 billion in 2026, up 8.4% from 2025, and projected to reach $1.3 billion by 2030, a 3.7% CAGR. Largest market: Mexico (70% of 2026 sales).

CENTRAL AMERICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	591	671	711	733	768	837	826	813	906	954	996	1,025	1,112	1,288
Market Growth (%)		13.6%	6.0%	3.0%	4.7%	9.1%	-1.3%	-1.7%	11.5%	5.3%	4.5%	2.9%	8.4%	3.7%

CENTRAL AMERICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Mexico	428.0	480.0	501.6	524.5	549.1	593.9	595.3	587.7	654.0	686.1	712.5	725.6	782.5	888.0
Guatemala	30.7	34.4	35.3	36.6	38.3	41.4	40.6	40.3	43.9	45.1	47.9	50.4	55.6	67.8
Panama	34.3	39.4	41.3	41.1	42.5	47.9	37.2	40.6	48.9	48.5	51.0	53.9	59.3	72.9
Costa Rica	55.0	70.1	81.8	80.8	89.0	103.2	108.1	102.2	114.7	127.2	135.5	143.4	157.5	190.1
El Salvador	11.5	13.3	14.0	13.8	14.2	14.8	13.3	12.9	13.8	14.4	15.1	15.8	17.3	20.6
Honduras	15.3	16.9	18.1	18.7	18.8	20.7	18.1	18.6	20.3	21.5	22.8	23.9	26.2	31.7
Other Countries	16.1	17.4	19.4	17.6	15.7	15.5	13.8	10.2	10.5	11.0	11.6	12.3	13.5	16.3

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Mexico	12.2%	4.5%	4.6%	4.7%	8.2%	0.2%	-1.3%	11.3%	4.9%	3.8%	1.8%	7.8%	3.2%
Guatemala	11.9%	2.5%	3.8%	4.7%	8.0%	-2.0%	-0.7%	9.0%	2.8%	6.1%	5.3%	10.1%	5.1%
Panama	14.7%	4.8%	-0.4%	3.5%	12.5%	-22.4%	9.4%	20.3%	-0.9%	5.1%	5.6%	10.0%	5.3%
Costa Rica	27.4%	16.7%	-1.2%	10.1%	15.9%	4.8%	-5.4%	12.3%	10.8%	6.5%	5.8%	9.8%	4.8%
El Salvador	15.6%	5.7%	-1.7%	2.7%	4.7%	-10.1%	-3.1%	6.7%	4.4%	5.0%	4.9%	9.5%	4.3%
Honduras	10.9%	7.1%	2.8%	0.8%	10.2%	-12.5%	2.5%	9.1%	5.9%	6.0%	4.9%	9.5%	4.9%
Other Countries	8.1%	11.6%	-9.3%	-10.4%	-1.6%	-11.2%	-26.0%	3.5%	3.9%	6.0%	6.0%	10.0%	4.8%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Mexico	72.4%	71.5%	70.5%	71.6%	71.5%	70.9%	72.0%	72.3%	72.2%	71.9%	71.5%	70.8%	70.4%	69.0%
Guatemala	5.2%	5.1%	5.0%	5.0%	5.0%	4.9%	4.9%	5.0%	4.8%	4.7%	4.8%	4.9%	5.0%	5.3%
Panama	5.8%	5.9%	5.8%	5.6%	5.5%	5.7%	4.5%	5.0%	5.4%	5.1%	5.1%	5.3%	5.3%	5.7%
Costa Rica	9.3%	10.4%	11.5%	11.0%	11.6%	12.3%	13.1%	12.6%	12.7%	13.3%	13.6%	14.0%	14.2%	14.8%
El Salvador	1.9%	2.0%	2.0%	1.9%	1.8%	1.8%	1.6%	1.6%	1.5%	1.5%	1.5%	1.5%	1.6%	1.6%
Honduras	2.6%	2.5%	2.5%	2.5%	2.4%	2.5%	2.2%	2.3%	2.2%	2.3%	2.3%	2.3%	2.4%	2.5%
Other Countries	2.7%	2.6%	2.7%	2.4%	2.1%	1.9%	1.7%	1.3%	1.2%	1.1%	1.2%	1.2%	1.2%	1.3%

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SPECIALIZED DESIGN SERVICES
CARIBBEAN

Kentley Insights

The Caribbean Specialized Design Services market size is forecast at $472.0 million in 2026, up 7.8% from 2025, and projected to reach $544.0 million by 2030, a 3.6% CAGR.
Largest market: Cuba (30% of 2026 sales).

CARIBBEAN MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	306	334	346	355	370	399	387	344	394	404	427	438	472	544
Market Growth (%)		9.0%	3.5%	2.8%	4.2%	7.8%	-3.2%	-11.0%	14.7%	2.5%	5.5%	2.6%	7.8%	3.6%

CARIBBEAN MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Puerto Rico	73.8	80.3	84.3	85.6	86.7	92.1	90.0	82.4	91.0	94.3	99.6	100.0	106.2	113.8
Cuba	93.9	103.3	108.4	112.0	114.4	120.6	118.5	106.1	118.0	122.4	128.3	132.8	143.1	164.5
Dominican Republic	69.6	75.4	73.4	76.0	85.3	94.2	88.6	71.9	91.1	94.2	101.3	104.6	115.0	144.3
Trinidad and Tobago	9.9	9.4	9.6	10.0	10.8	11.9	10.8	8.1	10.7	10.7	11.3	11.5	12.3	14.2
Jamaica	10.7	11.7	12.3	12.5	12.5	13.3	11.8	12.0	13.7	13.1	13.4	13.5	14.2	15.4
The Bahamas	7.3	8.5	8.7	9.2	8.9	11.4	9.5	9.9	11.3	10.2	10.8	11.2	12.2	13.8
Other Countries	41.2	45.3	48.9	50.0	51.7	55.7	57.3	53.6	58.6	59.3	62.0	64.0	69.0	78.1

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Puerto Rico	8.8%	4.9%	1.5%	1.3%	6.3%	-2.2%	-8.5%	10.4%	3.6%	5.6%	0.4%	6.1%	1.7%
Cuba	10.0%	4.9%	3.3%	2.2%	5.4%	-1.7%	-10.5%	11.3%	3.7%	4.8%	3.5%	7.8%	3.5%
Dominican Republic	8.4%	-2.7%	3.5%	12.3%	10.4%	-6.0%	-18.9%	26.7%	3.5%	7.4%	3.3%	9.9%	5.8%
Trinidad and Tobago	-4.7%	1.6%	4.7%	7.6%	10.2%	-9.6%	-24.3%	31.9%	0.0%	4.9%	2.0%	7.0%	3.6%
Jamaica	9.9%	5.0%	1.1%	-0.1%	6.8%	-11.1%	1.2%	14.4%	-4.4%	1.9%	1.1%	5.0%	2.0%
The Bahamas	16.2%	3.3%	5.8%	-3.7%	28.6%	-17.0%	4.1%	14.5%	-9.7%	5.8%	4.0%	8.3%	3.1%
Other Countries	10.0%	8.0%	2.3%	3.4%	7.6%	2.9%	-6.4%	9.3%	1.2%	4.6%	3.3%	7.8%	3.1%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Puerto Rico	24.1%	24.1%	24.4%	24.1%	23.4%	23.1%	23.3%	24.0%	23.1%	23.3%	23.3%	22.8%	22.5%	20.9%
Cuba	30.7%	30.9%	31.4%	31.5%	30.9%	30.2%	30.7%	30.8%	29.9%	30.3%	30.1%	30.3%	30.3%	30.2%
Dominican Republic	22.7%	22.6%	21.2%	21.4%	23.0%	23.6%	22.9%	20.9%	23.1%	23.3%	23.7%	23.9%	24.4%	26.5%
Trinidad and Tobago	3.2%	2.8%	2.8%	2.8%	2.9%	3.0%	2.8%	2.4%	2.7%	2.7%	2.6%	2.6%	2.6%	2.6%
Jamaica	3.5%	3.5%	3.6%	3.5%	3.4%	3.3%	3.1%	3.5%	3.5%	3.2%	3.1%	3.1%	3.0%	2.8%
The Bahamas	2.4%	2.5%	2.5%	2.6%	2.4%	2.9%	2.5%	2.9%	2.9%	2.5%	2.5%	2.6%	2.6%	2.5%
Other Countries	13.4%	13.6%	14.2%	14.1%	14.0%	13.9%	14.8%	15.6%	14.9%	14.7%	14.5%	14.6%	14.6%	14.4%

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SPECIALIZED DESIGN SERVICES

ASIA & OCEANIA

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EASTERN ASIA
China
Japan
South Korea
Taiwan
Hong Kong
Mongolia

SOUTHERN ASIA
India
Pakistan
Bangladesh
Sri Lanka
Nepal
Afghanistan
Maldives
Bhutan

SOUTHEAST ASIA
Indonesia
Thailand
Singapore
Malaysia
Philippines
Vietnam
Burma
Cambodia
Laos
Brunei
East Timor

AUSTRALASIA
Australia
New Zealand

CENTRAL ASIA
Kazakhstan
Uzbekistan
Turkmenistan
Kyrgyzstan
Tajikistan

OTHER OCEANIA
Papua New Guinea
New Caledonia
Guam
French Polynesia
Fiji
Northern Mariana Islands
Solomon Islands
Vanuatu
Samoa
American Samoa
Tonga
Micronesia
Cook Islands
Palau
Marshall Islands
Kiribati

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SPECIALIZED DESIGN SERVICES
ASIA & OCEANIA

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The Asia & Oceania Specialized Design Services market size is forecast at $35.3 billion in 2026, up 9.8% from 2025, and projected to reach $42.3 billion by 2030, a 4.6% CAGR. Largest subregion: Eastern Asia (72% of 2026 sales).

ASIA & OCEANIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	19,631	21,988	23,691	23,835	24,283	26,748	26,862	25,452	27,967	28,857	30,576	32,182	35,326	42,323
Market Growth (%)		12.0%	7.7%	0.6%	1.9%	10.2%	0.4%	-5.2%	9.9%	3.2%	6.0%	5.3%	9.8%	4.6%

ASIA & OCEANIA MARKET SIZE BY SUBREGION

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
EASTERN ASIA	15,178	16,887	17,958	17,983	18,109	19,816	19,867	18,680	20,354	21,016	22,237	23,364	25,590	30,254
SOUTHERN ASIA	1,334	1,598	1,930	1,868	2,050	2,386	2,410	2,356	2,627	2,714	2,955	3,197	3,591	4,787
SOUTHEAST ASIA	1,233	1,387	1,475	1,542	1,588	1,754	1,703	1,605	1,832	1,871	2,012	2,138	2,366	2,941
AUSTRALASIA	1,779	1,994	2,190	2,284	2,364	2,595	2,674	2,615	2,940	3,004	3,102	3,194	3,458	3,950
OTHER ASIA	108	123	137	158	172	197	208	196	213	252	270	290	321	391

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
EASTERN ASIA	11.3%	6.3%	0.1%	0.7%	9.4%	0.3%	-6.0%	9.0%	3.3%	5.8%	5.1%	9.5%	4.3%
SOUTHERN ASIA	19.8%	20.8%	-3.2%	9.8%	16.4%	1.0%	-2.2%	11.5%	3.3%	8.9%	8.2%	12.3%	7.5%
SOUTHEAST ASIA	12.5%	6.4%	4.6%	3.0%	10.5%	-2.9%	-5.8%	14.2%	2.1%	7.5%	6.2%	10.7%	5.6%
AUSTRALASIA	12.1%	9.9%	4.3%	3.5%	9.8%	3.0%	-2.2%	12.4%	2.2%	3.3%	3.0%	8.3%	3.4%
OTHER ASIA	14.3%	11.0%	15.6%	8.7%	14.2%	5.8%	-5.6%	8.6%	18.0%	7.3%	7.4%	10.7%	5.0%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
EASTERN ASIA	77.3%	76.8%	75.8%	75.4%	74.6%	74.1%	74.0%	73.4%	72.8%	72.8%	72.7%	72.6%	72.4%	71.5%
SOUTHERN ASIA	6.8%	7.3%	8.1%	7.8%	8.4%	8.9%	9.0%	9.3%	9.4%	9.4%	9.7%	9.9%	10.2%	11.3%
SOUTHEAST ASIA	6.3%	6.3%	6.2%	6.5%	6.5%	6.6%	6.3%	6.3%	6.6%	6.5%	6.6%	6.6%	6.7%	6.9%
AUSTRALASIA	9.1%	9.1%	9.2%	9.6%	9.7%	9.7%	10.0%	10.3%	10.5%	10.4%	10.1%	9.9%	9.8%	9.3%
OTHER ASIA	0.5%	0.6%	0.6%	0.7%	0.7%	0.7%	0.8%	0.8%	0.8%	0.9%	0.9%	0.9%	0.9%	0.9%

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SPECIALIZED DESIGN SERVICES
EASTERN ASIA

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The Eastern Asia Specialized Design Services market size is forecast at $25.6 billion in 2026, up 9.5% from 2025, and projected to reach $30.3 billion by 2030, a 4.3% CAGR.
Largest market: China (63% of 2026 sales).

EASTERN ASIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	15,178	16,887	17,958	17,983	18,109	19,816	19,867	18,680	20,354	21,016	22,237	23,364	25,590	30,254
Market Growth (%)		11.3%	6.3%	0.1%	0.7%	9.4%	0.3%	-6.0%	9.0%	3.3%	5.8%	5.1%	9.5%	4.3%

EASTERN ASIA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
China	9,540.3	10,602.4	11,312.7	11,279.6	11,288.9	12,035.6	12,284.5	11,407.6	12,371.1	12,830.1	13,785.4	14,645.2	16,203.9	19,897.9
Japan	3,739.5	4,185.1	4,469.7	4,516.8	4,620.7	5,316.1	5,194.3	5,008.2	5,514.2	5,625.1	5,751.4	5,891.6	6,300.6	6,786.0
South Korea	1,076.6	1,184.0	1,216.3	1,215.7	1,209.6	1,402.6	1,384.4	1,318.3	1,447.5	1,507.0	1,574.0	1,609.2	1,740.2	1,981.6
Taiwan	544.0	609.0	652.4	662.1	678.3	703.9	654.8	617.8	658.1	681.2	733.9	806.9	899.2	1,073.7
Hong Kong	273.9	302.6	303.3	304.9	308.0	353.4	345.0	324.0	358.0	368.1	386.6	405.0	440.0	506.3
Mongolia	3.3	3.8	3.7	3.7	3.7	4.6	4.4	4.3	4.9	5.0	5.3	5.8	6.4	8.2

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
China	11.1%	6.7%	-0.3%	0.1%	6.6%	2.1%	-7.1%	8.4%	3.7%	7.4%	6.2%	10.6%	5.3%
Japan	11.9%	6.8%	1.1%	2.3%	15.0%	-2.3%	-3.6%	10.1%	2.0%	2.2%	2.4%	6.9%	1.9%
South Korea	10.0%	2.7%	0.0%	-0.5%	15.9%	-1.3%	-4.8%	9.8%	4.1%	4.4%	2.2%	8.1%	3.3%
Taiwan	11.9%	7.1%	1.5%	2.4%	3.8%	-7.0%	-5.6%	6.5%	3.5%	7.7%	9.9%	11.4%	4.5%
Hong Kong	10.5%	0.2%	0.6%	1.0%	14.7%	-2.4%	-6.1%	10.5%	2.8%	5.0%	4.7%	8.6%	3.6%
Mongolia	15.8%	-2.5%	1.2%	-0.8%	22.9%	-4.4%	-1.9%	14.4%	0.9%	7.5%	8.0%	11.5%	6.5%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
China	62.9%	62.8%	63.0%	62.7%	62.3%	60.7%	61.8%	61.1%	60.8%	61.0%	62.0%	62.7%	63.3%	65.8%
Japan	24.6%	24.8%	24.9%	25.1%	25.5%	26.8%	26.1%	26.8%	27.1%	26.8%	25.9%	25.2%	24.6%	22.4%
South Korea	7.1%	7.0%	6.8%	6.8%	6.7%	7.1%	7.0%	7.1%	7.1%	7.2%	7.1%	6.9%	6.8%	6.5%
Taiwan	3.6%	3.6%	3.6%	3.7%	3.7%	3.6%	3.3%	3.3%	3.2%	3.2%	3.3%	3.5%	3.5%	3.5%
Hong Kong	1.8%	1.8%	1.7%	1.7%	1.7%	1.8%	1.7%	1.7%	1.8%	1.8%	1.7%	1.7%	1.7%	1.7%
Mongolia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

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SPECIALIZED DESIGN SERVICES
SOUTHERN ASIA

Kentley Insights

The Southern Asia Specialized Design Services market size is forecast at $3.6 billion in 2026, up 12.3% from 2025, and projected to reach $4.8 billion by 2030, a 7.5% CAGR.
Largest market: India (86% of 2026 sales).

SOUTHERN ASIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	1,334	1,598	1,930	1,868	2,050	2,386	2,410	2,356	2,627	2,714	2,955	3,197	3,591	4,787
Market Growth (%)		19.8%	20.8%	-3.2%	9.8%	16.4%	1.0%	-2.2%	11.5%	3.3%	8.9%	8.2%	12.3%	7.5%

SOUTHERN ASIA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
India	1,101.8	1,335.5	1,637.1	1,553.9	1,715.4	2,014.5	2,020.9	1,984.0	2,220.4	2,291.1	2,509.8	2,731.5	3,079.6	4,155.5
Pakistan	192.4	220.4	248.6	268.2	287.7	320.7	338.2	323.3	357.3	372.4	391.2	408.1	448.3	554.2
Bangladesh	9.7	10.8	11.6	12.0	12.3	13.4	14.0	13.3	14.6	15.7	16.8	17.6	19.5	25.4
Sri Lanka	18.5	18.5	19.6	19.9	20.3	22.3	21.9	20.8	18.3	18.5	19.9	21.0	23.0	27.3
Nepal	4.6	5.3	5.6	6.1	6.3	6.9	7.1	6.5	7.1	7.3	7.8	8.2	9.0	11.2
Afghanistan	5.2	5.4	5.6	5.6	5.5	5.9	5.9	5.6	6.3	6.5	6.8	7.1	7.8	9.4
Other Countries	2.0	2.1	2.3	2.2	2.3	2.4	2.0	2.2	2.5	2.6	2.8	3.0	3.4	4.3

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
India	21.2%	22.6%	-5.1%	10.4%	17.4%	0.3%	-1.8%	11.9%	3.2%	9.5%	8.8%	12.7%	7.8%
Pakistan	14.5%	12.8%	7.9%	7.3%	11.5%	5.5%	-4.4%	10.5%	4.2%	5.0%	4.3%	9.8%	5.4%
Bangladesh	11.0%	7.4%	3.1%	2.8%	8.6%	4.5%	-4.7%	9.9%	7.4%	6.6%	4.7%	10.9%	6.8%
Sri Lanka	0.3%	6.1%	1.1%	2.5%	9.9%	-2.1%	-4.8%	-12.0%	1.0%	7.4%	5.7%	9.3%	4.5%
Nepal	15.1%	6.1%	7.9%	3.6%	10.0%	2.3%	-7.9%	9.2%	2.9%	6.1%	5.8%	9.2%	5.7%
Afghanistan	5.4%	3.6%	-0.8%	-1.8%	8.1%	-0.9%	-4.5%	12.1%	4.0%	4.3%	4.2%	9.7%	4.8%
Other Countries	2.1%	9.9%	-0.6%	3.8%	3.8%	-18.5%	9.6%	17.0%	3.8%	7.1%	7.3%	11.6%	6.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
India	82.6%	83.6%	84.8%	83.2%	83.7%	84.4%	83.9%	84.2%	84.5%	84.4%	84.9%	85.5%	85.8%	86.8%
Pakistan	14.4%	13.8%	12.9%	14.4%	14.0%	13.4%	14.0%	13.7%	13.6%	13.7%	13.2%	12.8%	12.5%	11.6%
Bangladesh	0.7%	0.7%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.6%	0.5%	0.5%	0.5%
Sri Lanka	1.4%	1.2%	1.0%	1.1%	1.0%	0.9%	0.9%	0.9%	0.7%	0.7%	0.7%	0.7%	0.6%	0.6%
Nepal	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.2%	0.2%
Afghanistan	0.4%	0.3%	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%
Other Countries	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%

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SPECIALIZED DESIGN SERVICES
SOUTHEAST ASIA

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The Southeast Asia Specialized Design Services market size is forecast at $2.4 billion in 2026, up 10.7% from 2025, and projected to reach $2.9 billion by 2030, a 5.6% CAGR. Largest market: Indonesia (32% of 2026 sales).

SOUTHEAST ASIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	1,233	1,387	1,475	1,542	1,588	1,754	1,703	1,605	1,832	1,871	2,012	2,138	2,366	2,941
Market Growth (%)		12.5%	6.4%	4.6%	3.0%	10.5%	-2.9%	-5.8%	14.2%	2.1%	7.5%	6.2%	10.7%	5.6%

SOUTHEAST ASIA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Indonesia	373.9	432.8	457.1	474.8	484.3	532.1	531.0	519.7	585.3	593.4	637.5	677.9	754.2	964.2
Thailand	158.4	168.3	171.5	180.8	183.4	195.0	187.6	163.6	174.6	177.7	187.2	194.1	209.1	238.9
Singapore	308.9	355.3	375.9	390.4	396.6	445.4	406.7	384.0	456.3	455.1	490.3	520.9	571.7	670.8
Malaysia	105.5	115.2	129.5	140.6	152.4	174.0	161.8	136.5	167.7	181.0	194.6	207.2	229.8	285.2
Philippines	126.9	136.5	145.2	149.4	155.1	169.6	164.0	160.0	179.4	182.0	196.9	208.0	229.5	297.5
Vietnam	118.5	135.8	151.0	160.7	169.5	188.4	202.3	192.3	215.1	226.0	247.3	270.2	306.2	406.3
Other Countries	40.6	42.8	44.6	45.5	46.7	49.9	49.8	48.6	54.0	55.9	58.3	59.6	65.4	78.1

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Indonesia	15.7%	5.6%	3.9%	2.0%	9.9%	-0.2%	-2.1%	12.6%	1.4%	7.4%	6.3%	11.2%	6.3%
Thailand	6.2%	1.9%	5.4%	1.5%	6.3%	-3.8%	-12.8%	6.8%	1.8%	5.3%	3.6%	7.7%	3.4%
Singapore	15.0%	5.8%	3.9%	1.6%	12.3%	-8.7%	-5.6%	18.8%	-0.3%	7.7%	6.2%	9.7%	4.1%
Malaysia	9.2%	12.4%	8.5%	8.4%	14.2%	-7.0%	-15.6%	22.8%	7.9%	7.5%	6.4%	10.9%	5.5%
Philippines	7.5%	6.4%	2.9%	3.8%	9.4%	-3.3%	-2.4%	12.1%	1.5%	8.1%	5.6%	10.3%	6.7%
Vietnam	14.6%	11.2%	6.4%	5.5%	11.1%	7.4%	-5.0%	11.9%	5.1%	9.4%	9.2%	13.3%	7.3%
Other Countries	5.4%	4.0%	2.0%	2.8%	6.8%	-0.2%	-2.4%	11.0%	3.5%	4.3%	2.2%	9.6%	4.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Indonesia	30.3%	31.2%	31.0%	30.8%	30.5%	30.3%	31.2%	32.4%	31.9%	31.7%	31.7%	31.7%	31.9%	32.8%
Thailand	12.9%	12.1%	11.6%	11.7%	11.5%	11.1%	11.0%	10.2%	9.5%	9.5%	9.3%	9.1%	8.8%	8.1%
Singapore	25.1%	25.6%	25.5%	25.3%	25.0%	25.4%	23.9%	23.9%	24.9%	24.3%	24.4%	24.4%	24.2%	22.8%
Malaysia	8.6%	8.3%	8.8%	9.1%	9.6%	9.9%	9.5%	8.5%	9.2%	9.7%	9.7%	9.7%	9.7%	9.7%
Philippines	10.3%	9.8%	9.8%	9.7%	9.8%	9.7%	9.6%	10.0%	9.8%	9.7%	9.8%	9.7%	9.7%	10.1%
Vietnam	9.6%	9.8%	10.2%	10.4%	10.7%	10.7%	11.9%	12.0%	11.7%	12.1%	12.3%	12.6%	12.9%	13.8%
Other Countries	3.3%	3.1%	3.0%	2.9%	2.9%	2.8%	2.9%	3.0%	2.9%	3.0%	2.9%	2.8%	2.8%	2.7%

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SPECIALIZED DESIGN SERVICES
AUSTRALASIA

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The Australasia Specialized Design Services market size is forecast at $3.5 billion in 2026, up 8.3% from 2025, and projected to reach $4.0 billion by 2030, a 3.4% CAGR. Largest market: Australia (86% of 2026 sales).

AUSTRALASIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	1,779	1,994	2,190	2,284	2,364	2,595	2,674	2,615	2,940	3,004	3,102	3,194	3,458	3,950
Market Growth (%)		12.1%	9.9%	4.3%	3.5%	9.8%	3.0%	-2.2%	12.4%	2.2%	3.3%	3.0%	8.3%	3.4%

AUSTRALASIA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Australia	1,481.1	1,670.7	1,848.3	1,927.8	1,998.2	2,201.7	2,279.0	2,232.8	2,521.2	2,566.1	2,654.5	2,740.5	2,966.4	3,386.9
New Zealand	297.9	322.8	342.0	356.0	365.6	393.1	394.8	382.5	419.3	437.6	447.0	453.4	491.3	563.5

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Australia	12.8%	10.6%	4.3%	3.6%	10.2%	3.5%	-2.0%	12.9%	1.8%	3.4%	3.2%	8.2%	3.4%
New Zealand	8.4%	5.9%	4.1%	2.7%	7.5%	0.4%	-3.1%	9.6%	4.4%	2.1%	1.4%	8.3%	3.5%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Australia	83.3%	83.8%	84.4%	84.4%	84.5%	84.9%	85.2%	85.4%	85.7%	85.4%	85.6%	85.8%	85.8%	85.7%
New Zealand	16.7%	16.2%	15.6%	15.6%	15.5%	15.1%	14.8%	14.6%	14.3%	14.6%	14.4%	14.2%	14.2%	14.3%

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SPECIALIZED DESIGN SERVICES
CENTRAL ASIA

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The Central Asia Specialized Design Services market size is forecast at $292.0 million in 2026, up 10.8% from 2025, and projected to reach $356.4 million by 2030, a 5.1% CAGR. Largest market: Kazakhstan (78% of 2026 sales).

CENTRAL ASIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	83	99	111	133	148	174	184	177	190	228	245	263	292	356
Market Growth (%)		19.6%	12.1%	19.7%	11.0%	17.7%	5.5%	-3.7%	7.3%	19.8%	7.5%	7.6%	10.8%	5.1%

CENTRAL ASIA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Kazakhstan	72.9	87.1	97.2	116.6	128.3	146.8	155.0	143.5	149.3	177.3	190.6	205.3	227.6	276.6
Uzbekistan	2.3	3.0	3.9	4.4	5.4	8.2	11.4	13.9	17.0	20.3	22.2	24.2	27.3	36.1
Turkmenistan	6.6	7.9	8.8	10.5	12.3	16.4	14.5	17.2	20.2	25.8	27.3	28.6	31.2	36.0
Kyrgyzstan	0.9	1.1	1.2	1.4	1.6	2.2	2.4	1.8	2.6	3.0	3.4	3.8	4.3	5.6
Tajikistan	0.3	0.3	0.3	0.4	0.4	0.6	0.5	0.6	1.0	1.2	1.4	1.5	1.7	2.2

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Kazakhstan	19.4%	11.6%	20.0%	10.0%	14.4%	5.6%	-7.4%	4.0%	18.8%	7.4%	7.7%	10.8%	5.0%
Uzbekistan	30.5%	29.4%	14.2%	20.9%	53.4%	38.3%	22.4%	22.2%	19.8%	9.1%	8.9%	12.7%	7.2%
Turkmenistan	18.8%	11.6%	19.1%	16.8%	34.0%	-11.6%	18.8%	17.0%	27.9%	5.8%	4.8%	8.8%	3.6%
Kyrgyzstan	17.6%	13.4%	16.7%	14.9%	35.0%	8.2%	-25.7%	46.8%	16.4%	13.9%	12.3%	12.3%	6.9%
Tajikistan	8.7%	-4.5%	22.0%	16.5%	32.3%	-6.5%	19.7%	61.8%	22.7%	10.8%	9.6%	12.2%	6.2%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Kazakhstan	87.8%	87.7%	87.3%	87.5%	86.7%	84.3%	84.3%	81.1%	78.6%	77.9%	77.8%	77.9%	77.9%	77.6%
Uzbekistan	2.8%	3.0%	3.5%	3.3%	3.6%	4.7%	6.2%	7.8%	8.9%	8.9%	9.1%	9.2%	9.3%	10.1%
Turkmenistan	8.0%	7.9%	7.9%	7.9%	8.3%	9.4%	7.9%	9.7%	10.6%	11.3%	11.2%	10.9%	10.7%	10.1%
Kyrgyzstan	1.1%	1.1%	1.1%	1.1%	1.1%	1.3%	1.3%	1.0%	1.4%	1.3%	1.4%	1.5%	1.5%	1.6%
Tajikistan	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.4%	0.5%	0.5%	0.6%	0.6%	0.6%	0.6%

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SPECIALIZED DESIGN SERVICES
OTHER OCEANIA

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The Other Oceania Specialized Design Services market size is forecast at $29.3 million in 2026, up 9.2% from 2025, and projected to reach $34.3 million by 2030, a 4.0% CAGR.
Largest market: Papua New Guinea (50% of 2026 sales).

OTHER OCEANIA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	25	24	26	25	24	23	24	19	23	24	25	27	29	34
Market Growth (%)		-3.3%	6.7%	-2.0%	-3.3%	-7.1%	7.5%	-20.1%	20.4%	3.1%	5.7%	5.2%	9.2%	4.0%

OTHER OCEANIA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Papua New Guinea	15.1	13.5	13.8	13.0	11.6	10.5	11.7	9.4	11.1	11.7	12.4	13.2	14.6	17.5
New Caledonia	2.6	2.8	3.2	3.3	3.4	3.1	3.5	2.7	3.4	3.4	3.6	3.7	4.0	4.5
Guam	1.7	1.8	2.1	2.2	2.4	2.2	2.5	2.0	2.4	2.5	2.6	2.7	3.0	3.4
French Polynesia	1.9	2.1	2.2	2.3	2.3	2.4	2.1	1.8	2.1	2.1	2.2	2.3	2.4	2.8
Fiji	1.7	1.9	2.1	2.1	2.1	2.2	1.9	1.5	1.8	1.8	1.9	2.0	2.2	2.5
N. Mariana Islands	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.4	0.4
Other Countries	1.6	1.7	2.0	2.1	2.2	2.0	2.3	1.9	2.3	2.4	2.5	2.6	2.8	3.3

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Papua New Guinea	-10.5%	2.2%	-5.9%	-10.6%	-9.7%	11.5%	-20.1%	19.1%	4.5%	6.3%	6.8%	10.0%	4.6%
New Caledonia	6.4%	15.8%	0.6%	5.1%	-9.1%	12.2%	-21.5%	23.6%	0.3%	4.5%	3.3%	8.2%	3.0%
Guam	6.7%	14.9%	3.0%	9.0%	-8.2%	14.9%	-20.6%	23.2%	3.0%	4.8%	3.7%	8.2%	3.3%
French Polynesia	9.9%	7.8%	2.1%	0.2%	3.6%	-9.5%	-17.7%	17.2%	1.6%	4.7%	3.4%	7.7%	3.3%
Fiji	8.8%	8.6%	2.4%	0.9%	2.3%	-14.3%	-21.4%	19.3%	2.4%	5.9%	4.4%	8.6%	4.2%
N. Mariana Islands	7.8%	11.9%	1.3%	6.7%	-5.8%	13.6%	-17.1%	21.6%	1.8%	5.2%	3.5%	8.2%	3.1%
Other Countries	9.1%	15.3%	5.4%	7.4%	-9.2%	14.2%	-18.8%	23.2%	2.5%	5.9%	4.1%	8.9%	3.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Papua New Guinea	60.8%	56.3%	53.8%	51.7%	47.8%	46.5%	48.2%	48.2%	47.7%	48.3%	48.6%	49.3%	49.7%	50.9%
New Caledonia	10.6%	11.6%	12.6%	13.0%	14.1%	13.8%	14.4%	14.1%	14.5%	14.1%	14.0%	13.7%	13.6%	13.0%
Guam	6.9%	7.6%	8.2%	8.6%	9.7%	9.6%	10.2%	10.2%	10.4%	10.4%	10.3%	10.2%	10.1%	9.8%
French Polynesia	7.5%	8.5%	8.6%	9.0%	9.3%	10.4%	8.7%	9.0%	8.8%	8.6%	8.6%	8.4%	8.3%	8.1%
Fiji	7.0%	7.9%	8.0%	8.4%	8.8%	9.7%	7.7%	7.6%	7.5%	7.4%	7.5%	7.4%	7.4%	7.4%
N. Mariana Islands	0.9%	1.0%	1.0%	1.0%	1.2%	1.2%	1.2%	1.3%	1.3%	1.3%	1.3%	1.3%	1.2%	1.2%
Other Countries	6.3%	7.1%	7.7%	8.2%	9.1%	8.9%	9.5%	9.6%	9.9%	9.8%	9.8%	9.7%	9.7%	9.6%

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SPECIALIZED DESIGN SERVICES EUROPE

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Netherlands
Switzerland
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Austria
Luxembourg
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Liechtenstein

SOUTHERN EUROPE
Italy
Spain
Portugal
Malta
Andorra
San Marino

UK & IRELAND
United Kingdom
Ireland

EASTERN EUROPE
Russia
Poland
Czech Republic
Romania
Hungary
Ukraine
Slovakia
Belarus
Azerbaijan
Georgia
Armenia
Moldova

NORTHERN EUROPE
Sweden
Norway
Denmark
Finland
Lithuania
Latvia
Estonia
Iceland

SE EUROPE
Turkey
Greece
Bulgaria
Croatia
Slovenia
Serbia
Cyprus
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Albania
Macedonia
Kosovo
Montenegro

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SPECIALIZED DESIGN SERVICES
EUROPE

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Europe Specialized Design Services market size is forecast at $34.7 billion in 2026, up 7.4% from 2025, and projected to reach $38.5 billion by 2030, a 2.6% CAGR. Largest subregion: Western Europe (45% of 2026 sales).

EUROPE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	18,597	20,815	22,076	23,136	24,038	26,009	26,852	25,813	28,736	30,300	31,443	32,265	34,665	38,466
Market Growth (%)		11.9%	6.1%	4.8%	3.9%	8.2%	3.2%	-3.9%	11.3%	5.4%	3.8%	2.6%	7.4%	2.6%

EUROPE MARKET SIZE BY SUBREGION

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
WESTERN EUROPE	9,829	10,850	11,558	11,738	11,948	12,818	12,989	12,398	13,553	13,844	14,248	14,536	15,577	17,121
SOUTHERN EUROPE	2,542	2,824	3,010	3,142	3,283	3,632	3,630	3,520	3,989	4,320	4,506	4,625	4,968	5,464
UK & IRELAND	2,321	2,713	2,837	3,294	3,562	3,735	4,362	4,265	4,770	4,997	5,182	5,367	5,754	6,385
EASTERN EUROPE	1,894	2,224	2,350	2,576	2,770	3,081	3,085	2,967	3,362	3,811	4,033	4,150	4,480	5,064
NORTHERN EUROPE	1,388	1,517	1,612	1,664	1,741	1,919	1,968	1,883	2,176	2,366	2,461	2,531	2,734	3,069
SE EUROPE	622	687	710	722	734	824	817	781	886	961	1,015	1,057	1,153	1,363

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
WESTERN EUROPE	10.4%	6.5%	1.6%	1.8%	7.3%	1.3%	-4.6%	9.3%	2.1%	2.9%	2.0%	7.2%	2.4%
SOUTHERN EUROPE	11.1%	6.6%	4.4%	4.5%	10.6%	0.0%	-3.0%	13.3%	8.3%	4.3%	2.6%	7.4%	2.4%
UK & IRELAND	16.9%	4.6%	16.1%	8.1%	4.9%	16.8%	-2.2%	11.9%	4.8%	3.7%	3.6%	7.2%	2.6%
EASTERN EUROPE	17.4%	5.7%	9.6%	7.5%	11.3%	0.1%	-3.8%	13.3%	13.4%	5.8%	2.9%	7.9%	3.1%
NORTHERN EUROPE	9.3%	6.2%	3.3%	4.6%	10.2%	2.6%	-4.3%	15.6%	8.7%	4.0%	2.8%	8.0%	2.9%
SE EUROPE	10.5%	3.2%	1.7%	1.7%	12.2%	-0.8%	-4.4%	13.5%	8.5%	5.5%	4.2%	9.1%	4.3%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
WESTERN EUROPE	52.9%	52.1%	52.4%	50.7%	49.7%	49.3%	48.4%	48.0%	47.2%	45.7%	45.3%	45.1%	44.9%	44.5%
SOUTHERN EUROPE	13.7%	13.6%	13.6%	13.6%	13.7%	14.0%	13.5%	13.6%	13.9%	14.3%	14.3%	14.3%	14.3%	14.2%
UK & IRELAND	12.5%	13.0%	12.9%	14.2%	14.8%	14.4%	16.2%	16.5%	16.6%	16.5%	16.5%	16.6%	16.6%	16.6%
EASTERN EUROPE	10.2%	10.7%	10.6%	11.1%	11.5%	11.8%	11.5%	11.5%	11.7%	12.6%	12.8%	12.9%	12.9%	13.2%
NORTHERN EUROPE	7.5%	7.3%	7.3%	7.2%	7.2%	7.4%	7.3%	7.3%	7.6%	7.8%	7.8%	7.8%	7.9%	8.0%
SE EUROPE	3.3%	3.3%	3.2%	3.1%	3.1%	3.2%	3.0%	3.0%	3.1%	3.2%	3.2%	3.3%	3.3%	3.5%

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SPECIALIZED DESIGN SERVICES
WESTERN EUROPE

Kentley Insights

The Western Europe Specialized Design Services market size is forecast at $15.6 billion in 2026, up 7.2% from 2025, and projected to reach $17.1 billion by 2030, a 2.4% CAGR. Largest market: Germany (36% of 2026 sales).

WESTERN EUROPE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	9,829	10,850	11,558	11,738	11,948	12,818	12,989	12,398	13,553	13,844	14,248	14,536	15,577	17,121
Market Growth (%)		10.4%	6.5%	1.6%	1.8%	7.3%	1.3%	-4.6%	9.3%	2.1%	2.9%	2.0%	7.2%	2.4%

WESTERN EUROPE MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Germany	3,703.5	4,049.6	4,295.5	4,401.2	4,452.1	4,808.0	4,745.1	4,498.1	4,925.7	5,019.8	5,117.5	5,191.0	5,556.7	6,075.8
France	2,953.6	3,290.2	3,491.9	3,524.2	3,587.7	3,845.7	3,939.6	3,786.1	4,230.9	4,366.7	4,521.5	4,618.2	4,948.1	5,436.9
Netherlands	1,265.2	1,368.3	1,428.3	1,418.2	1,481.3	1,547.2	1,623.2	1,521.0	1,527.1	1,548.6	1,603.6	1,653.9	1,777.0	1,966.7
Switzerland	734.5	809.3	862.3	893.8	906.1	972.7	979.1	956.7	1,062.1	1,077.1	1,118.5	1,146.9	1,233.4	1,372.8
Belgium	811.4	908.2	979.1	995.5	1,012.5	1,104.3	1,114.5	1,040.3	1,126.5	1,141.3	1,181.8	1,208.2	1,292.1	1,417.3
Austria	210.4	256.3	317.0	318.1	321.4	343.7	383.5	396.5	463.1	468.3	476.4	485.2	518.9	567.5
Other Countries	150.3	168.4	184.2	187.2	187.3	196.6	204.3	199.1	217.4	222.0	228.3	232.5	250.6	283.9

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Germany	9.3%	6.1%	2.5%	1.2%	8.0%	-1.3%	-5.2%	9.5%	1.9%	1.9%	1.4%	7.0%	2.3%
France	11.4%	6.1%	0.9%	1.8%	7.2%	2.4%	-3.9%	11.7%	3.2%	3.5%	2.1%	7.1%	2.4%
Netherlands	8.2%	4.4%	-0.7%	4.4%	4.5%	4.9%	-6.3%	0.4%	1.4%	3.5%	3.1%	7.4%	2.6%
Switzerland	10.2%	6.6%	3.7%	1.4%	7.3%	0.7%	-2.3%	11.0%	1.4%	3.8%	2.5%	7.5%	2.7%
Belgium	11.9%	7.8%	1.7%	1.7%	9.1%	0.9%	-6.7%	8.3%	1.3%	3.5%	2.2%	6.9%	2.3%
Austria	21.9%	23.6%	0.4%	1.1%	6.9%	11.6%	3.4%	16.8%	1.1%	1.7%	1.8%	6.9%	2.3%
Other Countries	12.1%	9.3%	1.7%	0.0%	5.0%	3.9%	-2.5%	9.2%	2.1%	2.8%	1.8%	7.8%	3.2%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Germany	37.7%	37.3%	37.2%	37.5%	37.3%	37.5%	36.5%	36.3%	36.3%	36.3%	35.9%	35.7%	35.7%	35.5%
France	30.1%	30.3%	30.2%	30.0%	30.0%	30.0%	30.3%	30.5%	31.2%	31.5%	31.7%	31.8%	31.8%	31.8%
Netherlands	12.9%	12.6%	12.4%	12.1%	12.4%	12.1%	12.5%	12.3%	11.3%	11.2%	11.3%	11.4%	11.4%	11.5%
Switzerland	7.5%	7.5%	7.5%	7.6%	7.6%	7.6%	7.5%	7.7%	7.8%	7.8%	7.9%	7.9%	7.9%	8.0%
Belgium	8.3%	8.4%	8.5%	8.5%	8.5%	8.6%	8.6%	8.4%	8.3%	8.2%	8.3%	8.3%	8.3%	8.3%
Austria	2.1%	2.4%	2.7%	2.7%	2.7%	2.7%	3.0%	3.2%	3.4%	3.4%	3.3%	3.3%	3.3%	3.3%
Other Countries	1.5%	1.6%	1.6%	1.6%	1.6%	1.5%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.6%	1.7%

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SPECIALIZED DESIGN SERVICES
SOUTHERN EUROPE

Kentley Insights

The Southern Europe Specialized Design Services market size is forecast at $5.0 billion in 2026, up 7.4% from 2025, and projected to reach $5.5 billion by 2030, a 2.4% CAGR. Largest market: Italy (58% of 2026 sales).

SOUTHERN EUROPE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	2,542	2,824	3,010	3,142	3,283	3,632	3,630	3,520	3,989	4,320	4,506	4,625	4,968	5,464
Market Growth (%)		11.1%	6.6%	4.4%	4.5%	10.6%	0.0%	-3.0%	13.3%	8.3%	4.3%	2.6%	7.4%	2.4%

SOUTHERN EUROPE MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Italy	1,621.2	1,821.4	1,920.7	1,987.3	2,053.8	2,253.2	2,204.3	2,135.9	2,371.5	2,562.2	2,645.4	2,691.3	2,872.8	3,097.8
Spain	815.9	869.6	929.0	971.4	1,043.6	1,166.7	1,196.9	1,148.2	1,345.6	1,466.0	1,553.1	1,615.8	1,750.6	1,974.2
Portugal	86.6	109.1	131.5	150.8	154.1	175.9	193.1	199.2	230.4	247.0	258.5	266.6	288.3	324.3
Malta	14.1	18.5	23.2	26.6	27.3	30.8	30.1	30.4	35.0	38.2	41.5	43.7	48.0	58.7
Andorra	2.3	2.6	2.9	3.1	3.0	3.4	3.7	3.7	4.1	4.4	4.5	4.6	4.9	5.5
San Marino	2.4	2.5	2.6	2.6	1.8	2.1	2.4	2.3	2.5	2.6	2.7	2.8	3.0	3.3

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Italy	12.3%	5.4%	3.5%	3.3%	9.7%	-2.2%	-3.1%	11.0%	8.0%	3.2%	1.7%	6.7%	1.9%
Spain	6.6%	6.8%	4.6%	7.4%	11.8%	2.6%	-4.1%	17.2%	8.9%	5.9%	4.0%	8.3%	3.0%
Portugal	26.1%	20.5%	14.7%	2.1%	14.2%	9.8%	3.2%	15.6%	7.2%	4.6%	3.1%	8.1%	3.0%
Malta	30.8%	25.3%	15.0%	2.4%	12.7%	-2.1%	0.9%	15.3%	9.0%	8.6%	5.2%	9.9%	5.2%
Andorra	11.4%	11.2%	7.8%	-1.7%	12.7%	7.4%	0.8%	11.6%	6.1%	2.8%	1.7%	7.6%	2.8%
San Marino	6.2%	2.7%	2.7%	-32.5%	20.0%	9.8%	-0.7%	6.6%	6.2%	3.4%	2.7%	7.5%	2.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Italy	63.8%	64.5%	63.8%	63.3%	62.5%	62.0%	60.7%	60.7%	59.4%	59.3%	58.7%	58.2%	57.8%	56.7%
Spain	32.1%	30.8%	30.9%	30.9%	31.8%	32.1%	33.0%	32.6%	33.7%	33.9%	34.5%	34.9%	35.2%	36.1%
Portugal	3.4%	3.9%	4.4%	4.8%	4.7%	4.8%	5.3%	5.7%	5.8%	5.7%	5.7%	5.8%	5.8%	5.9%
Malta	0.6%	0.7%	0.8%	0.8%	0.8%	0.8%	0.8%	0.9%	0.9%	0.9%	0.9%	0.9%	1.0%	1.1%
Andorra	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%
San Marino	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%

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SPECIALIZED DESIGN SERVICES
UNITED KINGDOM & IRELAND

Kentley Insights

The United Kingdom & Ireland Specialized Design Services market size is forecast at $5.8 billion in 2026, up 7.2% from 2025, and projected to reach $6.4 billion by 2030, a 2.6% CAGR. Largest market: United Kingdom (89% of 2026 sales).

UNITED KINGDOM & IRELAND MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	2,321	2,713	2,837	3,294	3,562	3,735	4,362	4,265	4,770	4,997	5,182	5,367	5,754	6,385
Market Growth (%)		16.9%	4.6%	16.1%	8.1%	4.9%	16.8%	-2.2%	11.9%	4.8%	3.7%	3.6%	7.2%	2.6%

UNITED KINGDOM & IRELAND MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
United Kingdom	2,046.1	2,400.7	2,491.4	2,930.9	3,200.4	3,342.4	3,953.4	3,867.5	4,330.5	4,530.9	4,691.5	4,810.6	5,149.4	5,685.8
Ireland	274.8	312.4	345.6	363.0	361.2	392.6	408.9	397.2	439.6	466.5	490.1	556.4	605.1	699.2

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
United Kingdom	17.3%	3.8%	17.6%	9.2%	4.4%	18.3%	-2.2%	12.0%	4.6%	3.5%	2.5%	7.0%	2.5%
Ireland	13.6%	10.7%	5.0%	-0.5%	8.7%	4.1%	-2.8%	10.7%	6.1%	5.0%	13.5%	8.7%	3.7%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
United Kingdom	88.2%	88.5%	87.8%	89.0%	89.9%	89.5%	90.6%	90.7%	90.8%	90.7%	90.5%	89.6%	89.5%	89.0%
Ireland	11.8%	11.5%	12.2%	11.0%	10.1%	10.5%	9.4%	9.3%	9.2%	9.3%	9.5%	10.4%	10.5%	11.0%

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SPECIALIZED DESIGN SERVICES
EASTERN EUROPE

Kentley Insights

The Eastern Europe Specialized Design Services market size is forecast at $4.5 billion in 2026, up 7.9% from 2025, and projected to reach $5.1 billion by 2030, a 3.1% CAGR.
Largest market: Russia (47% of 2026 sales).

EASTERN EUROPE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	1,894	2,224	2,350	2,576	2,770	3,081	3,085	2,967	3,362	3,811	4,033	4,150	4,480	5,064
Market Growth (%)		17.4%	5.7%	9.6%	7.5%	11.3%	0.1%	-3.8%	13.3%	13.4%	5.8%	2.9%	7.9%	3.1%

EASTERN EUROPE MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Russia	896.1	1,044.3	1,072.6	1,160.3	1,242.4	1,330.4	1,380.9	1,313.8	1,550.4	1,773.5	1,903.8	1,946.4	2,089.3	2,293.1
Poland	381.1	456.8	500.4	543.0	596.2	668.4	647.4	643.7	726.4	824.4	869.3	911.3	998.3	1,174.2
Czech Republic	128.9	161.0	170.0	191.4	195.2	231.8	229.1	215.6	281.1	311.1	322.8	334.9	363.1	414.0
Romania	190.5	222.9	226.6	256.4	256.4	291.3	284.7	257.9	326.4	362.6	374.8	382.0	408.5	469.5
Hungary	103.0	124.1	149.0	175.3	211.0	257.1	254.5	256.1	204.3	245.9	253.4	257.6	278.0	318.7
Ukraine	91.6	86.8	94.8	99.4	104.0	112.3	99.5	94.8	64.1	62.6	66.1	68.1	73.7	88.8
Other Countries	103.4	127.6	136.7	150.4	164.4	190.0	188.5	184.9	208.9	230.9	243.3	249.9	268.6	306.1

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Russia	16.5%	2.7%	8.2%	7.1%	7.1%	3.8%	-4.9%	18.0%	14.4%	7.3%	2.2%	7.3%	2.4%
Poland	19.9%	9.6%	8.5%	9.8%	12.1%	-3.1%	-0.6%	12.8%	13.5%	5.4%	4.8%	9.5%	4.1%
Czech Republic	24.9%	5.6%	12.6%	2.0%	18.7%	-1.2%	-5.9%	30.4%	10.7%	3.7%	3.7%	8.4%	3.3%
Romania	17.0%	1.7%	13.2%	0.0%	13.6%	-2.3%	-9.4%	26.6%	11.1%	3.3%	1.9%	6.9%	3.5%
Hungary	20.5%	20.0%	17.6%	20.4%	21.8%	-1.0%	0.6%	-20.2%	20.4%	3.0%	1.6%	7.9%	3.5%
Ukraine	-5.1%	9.1%	4.9%	4.6%	8.0%	-11.4%	-4.8%	-32.3%	-2.4%	5.6%	3.0%	8.2%	4.8%
Other Countries	23.4%	7.1%	10.0%	9.3%	15.6%	-0.8%	-1.9%	13.0%	10.5%	5.4%	2.7%	7.5%	3.3%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Russia	47.3%	47.0%	45.6%	45.0%	44.9%	43.2%	44.8%	44.3%	46.1%	46.5%	47.2%	46.9%	46.6%	45.3%
Poland	20.1%	20.5%	21.3%	21.1%	21.5%	21.7%	21.0%	21.7%	21.6%	21.6%	21.6%	22.0%	22.3%	23.2%
Czech Republic	6.8%	7.2%	7.2%	7.4%	7.0%	7.5%	7.4%	7.3%	8.4%	8.2%	8.0%	8.1%	8.1%	8.2%
Romania	10.1%	10.0%	9.6%	10.0%	9.3%	9.5%	9.2%	8.7%	9.7%	9.5%	9.3%	9.2%	9.1%	9.3%
Hungary	5.4%	5.6%	6.3%	6.8%	7.6%	8.3%	8.2%	8.6%	6.1%	6.5%	6.3%	6.2%	6.2%	6.3%
Ukraine	4.8%	3.9%	4.0%	3.9%	3.8%	3.6%	3.2%	3.2%	1.9%	1.6%	1.6%	1.6%	1.6%	1.8%
Other Countries	5.5%	5.7%	5.8%	5.8%	5.9%	6.2%	6.1%	6.2%	6.2%	6.1%	6.0%	6.0%	6.0%	6.0%

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SPECIALIZED DESIGN SERVICES
NORTHERN EUROPE

Kentley Insights

The Northern Europe Specialized Design Services market size is forecast at $2.7 billion in 2026, up 8.0% from 2025, and projected to reach $3.1 billion by 2030, a 2.9% CAGR.
Largest market: Sweden (39% of 2026 sales).

NORTHERN EUROPE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	1,388	1,517	1,612	1,664	1,741	1,919	1,968	1,883	2,176	2,366	2,461	2,531	2,734	3,069
Market Growth (%)		9.3%	6.2%	3.3%	4.6%	10.2%	2.6%	-4.3%	15.6%	8.7%	4.0%	2.8%	8.0%	2.9%

NORTHERN EUROPE MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Sweden	591.8	629.0	642.5	660.8	698.3	789.3	804.3	754.2	857.2	936.1	968.4	994.9	1,076.9	1,217.0
Norway	228.4	257.1	296.5	300.7	309.8	330.4	346.4	322.1	389.5	415.3	431.2	441.3	475.5	526.9
Denmark	343.7	377.7	397.0	409.6	423.5	455.8	465.5	441.8	482.2	529.5	561.0	584.2	632.4	709.8
Finland	146.2	163.9	178.1	187.4	197.0	218.0	223.1	231.0	282.4	308.2	316.9	321.5	344.8	380.1
Lithuania	30.5	34.3	37.6	39.7	41.9	46.7	47.0	48.3	57.8	62.4	65.8	68.5	74.7	87.0
Latvia	19.9	22.4	23.4	26.1	28.8	31.5	32.0	32.0	38.4	41.2	42.2	43.6	47.3	54.5
Other Countries	27.4	32.6	36.5	39.8	42.0	47.0	49.6	53.1	68.4	73.6	75.0	76.5	82.5	93.5

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Sweden	6.3%	2.1%	2.9%	5.7%	13.0%	1.9%	-6.2%	13.7%	9.2%	3.4%	2.7%	8.2%	3.1%
Norway	12.5%	15.3%	1.4%	3.0%	6.6%	4.9%	-7.0%	20.9%	6.6%	3.8%	2.3%	7.7%	2.6%
Denmark	9.9%	5.1%	3.2%	3.4%	7.6%	2.1%	-5.1%	9.1%	9.8%	5.9%	4.1%	8.2%	2.9%
Finland	12.1%	8.7%	5.2%	5.1%	10.7%	2.3%	3.5%	22.3%	9.1%	2.8%	1.4%	7.2%	2.5%
Lithuania	12.7%	9.5%	5.6%	5.5%	11.5%	0.8%	2.6%	19.9%	7.8%	5.4%	4.1%	9.1%	3.9%
Latvia	12.9%	4.4%	11.5%	10.4%	9.2%	1.7%	-0.1%	20.1%	7.2%	2.4%	3.3%	8.4%	3.6%
Other Countries	18.8%	12.2%	8.9%	5.5%	11.9%	5.6%	7.1%	28.7%	7.6%	1.9%	2.1%	7.8%	3.2%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Sweden	42.6%	41.5%	39.9%	39.7%	40.1%	41.1%	40.9%	40.1%	39.4%	39.6%	39.4%	39.3%	39.4%	39.7%
Norway	16.5%	16.9%	18.4%	18.1%	17.8%	17.2%	17.6%	17.1%	17.9%	17.5%	17.5%	17.4%	17.4%	17.2%
Denmark	24.8%	24.9%	24.6%	24.6%	24.3%	23.8%	23.7%	23.5%	22.2%	22.4%	22.8%	23.1%	23.1%	23.1%
Finland	10.5%	10.8%	11.0%	11.3%	11.3%	11.4%	11.3%	12.3%	13.0%	13.0%	12.9%	12.7%	12.6%	12.4%
Lithuania	2.2%	2.3%	2.3%	2.4%	2.4%	2.4%	2.4%	2.6%	2.7%	2.6%	2.7%	2.7%	2.7%	2.8%
Latvia	1.4%	1.5%	1.5%	1.6%	1.7%	1.6%	1.6%	1.7%	1.8%	1.7%	1.7%	1.7%	1.7%	1.8%
Other Countries	2.0%	2.1%	2.3%	2.4%	2.4%	2.4%	2.5%	2.8%	3.1%	3.1%	3.0%	3.0%	3.0%	3.0%

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SPECIALIZED DESIGN SERVICES
SOUTHEASTERN EUROPE

Kentley Insights

The Southeastern Europe Specialized Design Services market size is forecast at $1.2 billion in 2026, up 9.1% from 2025, and projected to reach $1.4 billion by 2030, a 4.3% CAGR. Largest market: Turkey (43% of 2026 sales).

SOUTHEASTERN EUROPE MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	622	687	710	722	734	824	817	781	886	961	1,015	1,057	1,153	1,363
Market Growth (%)		10.5%	3.2%	1.7%	1.7%	12.2%	-0.8%	-4.4%	13.5%	8.5%	5.5%	4.2%	9.1%	4.3%

SOUTHEASTERN EUROPE MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Turkey	313.1	334.1	334.6	335.0	334.5	368.8	366.2	337.3	381.3	408.2	431.7	452.6	496.2	602.2
Greece	70.3	88.2	92.7	93.8	100.1	120.0	120.4	120.4	141.2	156.9	164.0	169.5	183.1	205.6
Bulgaria	39.8	49.4	50.9	49.9	51.0	61.0	59.4	60.9	66.6	73.2	77.5	80.9	88.2	103.0
Croatia	49.7	53.0	56.0	56.8	57.9	64.7	62.3	61.7	70.6	77.9	82.7	86.4	94.0	109.3
Slovenia	54.1	58.3	62.3	65.5	66.1	72.0	73.6	70.5	81.1	87.0	90.6	92.7	100.4	115.1
Serbia	42.0	44.0	46.5	47.6	46.1	49.7	48.0	46.4	52.0	56.9	60.5	62.5	68.1	82.1
Other Countries	53.2	60.3	66.6	72.9	78.3	87.4	87.3	83.7	93.3	101.2	107.5	112.4	122.7	145.5

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Turkey	6.7%	0.2%	0.1%	-0.2%	10.3%	-0.7%	-7.9%	13.0%	7.1%	5.7%	4.8%	9.6%	5.0%
Greece	25.5%	5.1%	1.2%	6.6%	19.9%	0.3%	0.0%	17.3%	11.1%	4.5%	3.3%	8.0%	2.9%
Bulgaria	24.2%	3.0%	-1.9%	2.2%	19.4%	-2.6%	2.7%	9.3%	9.9%	5.8%	4.3%	9.0%	4.0%
Croatia	6.6%	5.6%	1.4%	1.9%	11.7%	-3.6%	-1.0%	14.3%	10.4%	6.2%	4.4%	8.8%	3.8%
Slovenia	7.7%	6.9%	5.2%	0.9%	9.0%	2.2%	-4.3%	15.1%	7.3%	4.1%	2.3%	8.2%	3.5%
Serbia	4.7%	5.8%	2.3%	-3.3%	7.9%	-3.4%	-3.3%	12.0%	9.5%	6.3%	3.2%	9.0%	4.8%
Other Countries	13.5%	10.3%	9.4%	7.5%	11.5%	0.0%	-4.1%	11.4%	8.5%	6.2%	4.6%	9.2%	4.3%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Turkey	50.3%	48.6%	47.2%	46.4%	45.6%	44.8%	44.8%	43.2%	43.0%	42.5%	42.6%	42.8%	43.0%	44.2%
Greece	11.3%	12.8%	13.1%	13.0%	13.6%	14.6%	14.7%	15.4%	15.9%	16.3%	16.2%	16.0%	15.9%	15.1%
Bulgaria	6.4%	7.2%	7.2%	6.9%	7.0%	7.4%	7.3%	7.8%	7.5%	7.6%	7.6%	7.7%	7.6%	7.6%
Croatia	8.0%	7.7%	7.9%	7.9%	7.9%	7.9%	7.6%	7.9%	8.0%	8.1%	8.2%	8.2%	8.2%	8.0%
Slovenia	8.7%	8.5%	8.8%	9.1%	9.0%	8.7%	9.0%	9.0%	9.2%	9.1%	8.9%	8.8%	8.7%	8.4%
Serbia	6.8%	6.4%	6.6%	6.6%	6.3%	6.0%	5.9%	5.9%	5.9%	5.9%	6.0%	5.9%	5.9%	6.0%
Other Countries	8.5%	8.8%	9.4%	10.1%	10.7%	10.6%	10.7%	10.7%	10.5%	10.5%	10.6%	10.6%	10.6%	10.7%

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SPECIALIZED DESIGN SERVICES
AFRICA & MIDDLE EAST

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MIDDLE EAST
Saudi Arabia
Iran
United Arab Emirates
Israel
Iraq
Qatar
Kuwait
Oman
Lebanon
Jordan
Bahrain
Yemen
Syria
Palestine

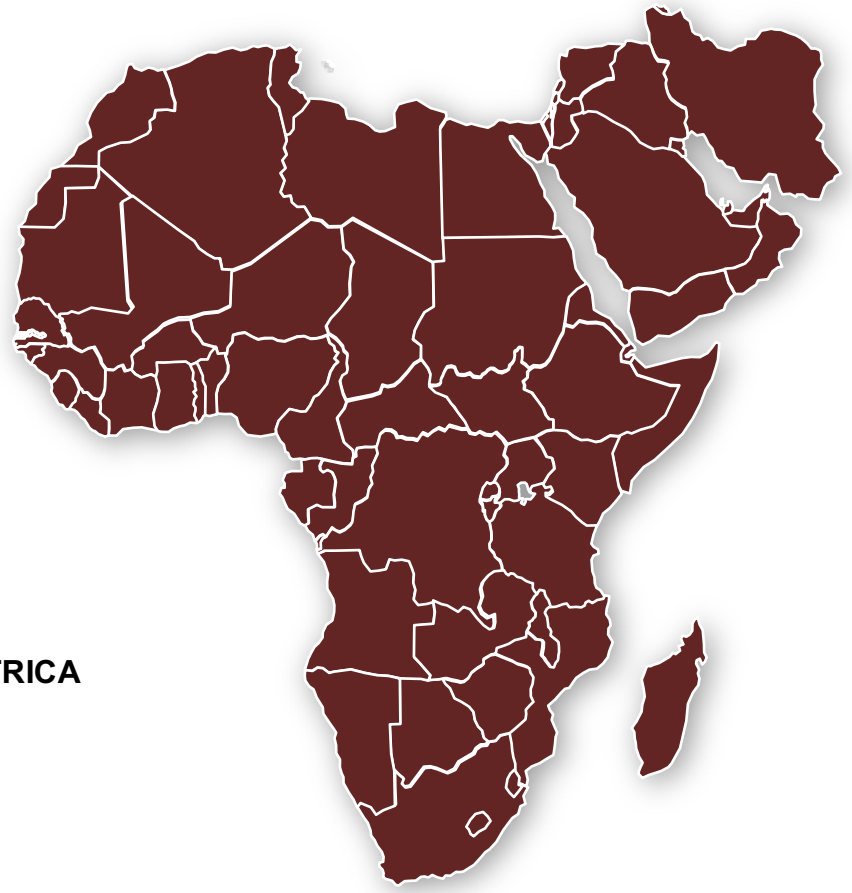
NORTH AFRICA
Egypt
Algeria
Morocco
Sudan
Tunisia
Libya
South Sudan

WESTERN AFRICA
Nigeria
Ghana
Ivory Coast
Senegal
Mali
Burkina Faso
Niger
Guinea
Benin
Mauritania
Togo
Sierra Leone
Liberia
Cape Verde
Gambia, The
Guinea-Bissau

CENTRAL AFRICA
Angola
Congo (DR)
Cameroon
Gabon
Congo
Equatorial Guinea
Chad
Central African Republic
Sao Tome and Principe

EASTERN AFRICA
Kenya
Ethiopia
Tanzania
Uganda
Zambia
Zimbabwe
Mozambique
Mauritius
Madagascar
Rwanda
Malawi
Eritrea
Burundi
Djibouti
Seychelles
Somalia
Comoros

SOUTHERN AFRICA
South Africa
Botswana
Namibia
Eswatini
Lesotho



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SPECIALIZED DESIGN SERVICES
AFRICA & MIDDLE EAST

Kentley Insights

The Africa & Middle East Specialized Design Services market size is forecast at $4.6 billion in 2026, up 9.0% from 2025, and projected to reach $5.6 billion by 2030, a 4.9% CAGR. Largest subregion: Middle East (59% of 2026 sales).

AFRICA & MIDDLE EAST MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	2,541	2,844	3,173	3,260	3,412	3,602	3,549	3,423	3,782	3,815	4,002	4,209	4,586	5,562
Market Growth (%)		11.9%	11.6%	2.8%	4.7%	5.6%	-1.5%	-3.6%	10.5%	0.9%	4.9%	5.2%	9.0%	4.9%

AFRICA & MIDDLE EAST MARKET SIZE BY SUBREGION

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
MIDDLE EAST	1,489	1,687	1,896	1,950	2,004	2,085	2,053	2,038	2,298	2,289	2,385	2,499	2,697	3,194
SOUTHERN AFRICA	131	143	150	151	150	159	158	151	164	165	170	174	187	210
NORTH AFRICA	318	361	395	421	473	504	509	464	489	502	523	552	609	752
EASTERN AFRICA	93	106	114	117	124	136	132	124	137	141	152	163	183	241
CENTRAL AFRICA	91	104	110	113	136	150	151	136	142	147	157	165	180	219

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
MIDDLE EAST	13.3%	12.4%	2.9%	2.8%	4.0%	-1.5%	-0.7%	12.8%	-0.4%	4.2%	4.8%	7.9%	4.3%
SOUTHERN AFRICA	9.0%	5.1%	0.7%	-0.9%	5.8%	-0.5%	-4.2%	8.4%	0.8%	2.9%	2.3%	7.5%	2.9%
NORTH AFRICA	13.7%	9.4%	6.4%	12.5%	6.5%	0.9%	-8.8%	5.3%	2.6%	4.2%	5.7%	10.3%	5.4%
EASTERN AFRICA	13.1%	8.3%	2.7%	5.6%	9.7%	-3.4%	-5.6%	10.2%	3.2%	7.9%	7.0%	12.1%	7.2%
CENTRAL AFRICA	13.7%	6.4%	2.5%	20.0%	10.2%	0.6%	-9.5%	4.5%	3.3%	7.0%	4.6%	9.6%	5.0%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
MIDDLE EAST	58.6%	59.3%	59.8%	59.8%	58.7%	57.9%	57.8%	59.5%	60.8%	60.0%	59.6%	59.4%	58.8%	57.4%
SOUTHERN AFRICA	5.2%	5.0%	4.7%	4.6%	4.4%	4.4%	4.5%	4.4%	4.3%	4.3%	4.3%	4.1%	4.1%	3.8%
NORTH AFRICA	12.5%	12.7%	12.5%	12.9%	13.9%	14.0%	14.3%	13.6%	12.9%	13.2%	13.1%	13.1%	13.3%	13.5%
EASTERN AFRICA	3.7%	3.7%	3.6%	3.6%	3.6%	3.8%	3.7%	3.6%	3.6%	3.7%	3.8%	3.9%	4.0%	4.3%
CENTRAL AFRICA	3.6%	3.7%	3.5%	3.5%	4.0%	4.2%	4.2%	4.0%	3.8%	3.9%	3.9%	3.9%	3.9%	3.9%

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SPECIALIZED DESIGN SERVICES
MIDDLE EAST

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The Middle East Specialized Design Services market size is forecast at $2.7 billion in 2026, up 7.9% from 2025, and projected to reach $3.2 billion by 2030, a 4.3% CAGR. Largest market: Israel (30% of 2026 sales).

MIDDLE EAST MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	1,489	1,687	1,896	1,950	2,004	2,085	2,053	2,038	2,298	2,289	2,385	2,499	2,697	3,194
Market Growth (%)		13.3%	12.4%	2.9%	2.8%	4.0%	-1.5%	-0.7%	12.8%	-0.4%	4.2%	4.8%	7.9%	4.3%

MIDDLE EAST MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Saudi Arabia	307.4	379.6	454.0	472.2	528.5	558.5	607.1	579.1	651.0	650.8	683.7	722.9	790.4	946.5
Iran	66.8	79.8	90.0	92.9	90.3	78.2	66.8	64.3	71.7	71.6	76.0	75.8	75.9	78.3
United Arab Emirates	304.1	339.2	372.1	379.2	371.1	374.9	369.5	343.7	401.8	401.8	427.7	457.8	500.5	615.2
Israel	440.3	476.8	539.9	578.1	581.4	617.6	587.2	618.1	696.9	689.8	713.6	743.1	815.5	981.7
Iraq	113.8	125.2	138.4	124.2	129.5	137.0	128.4	152.0	155.2	154.2	158.2	159.5	158.6	172.7
Qatar	69.5	79.9	83.2	79.9	71.7	73.5	72.4	70.8	80.4	79.9	83.8	87.1	85.1	89.2
Other Countries	186.8	206.8	218.3	223.7	231.6	245.0	221.4	210.1	241.3	240.5	242.5	252.7	271.0	310.8

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Saudi Arabia	23.5%	19.6%	4.0%	11.9%	5.7%	8.7%	-4.6%	12.4%	0.0%	5.0%	5.7%	9.3%	4.6%
Iran	19.4%	12.9%	3.2%	-2.8%	-13.5%	-14.5%	-3.7%	11.4%	-0.1%	6.1%	-0.3%	0.1%	0.8%
United Arab Emirates	11.6%	9.7%	1.9%	-2.1%	1.0%	-1.5%	-7.0%	16.9%	0.0%	6.4%	7.0%	9.3%	5.3%
Israel	8.3%	13.2%	7.1%	0.6%	6.2%	-4.9%	5.3%	12.8%	-1.0%	3.4%	4.1%	9.7%	4.7%
Iraq	10.0%	10.5%	-10.2%	4.3%	5.8%	-6.3%	18.3%	2.1%	-0.6%	2.5%	0.8%	-0.6%	2.2%
Qatar	14.9%	4.2%	-4.0%	-10.3%	2.5%	-1.4%	-2.3%	13.6%	-0.6%	4.8%	4.0%	-2.4%	1.2%
Other Countries	10.7%	5.6%	2.5%	3.5%	5.8%	-9.6%	-5.1%	14.8%	-0.3%	0.8%	4.2%	7.2%	3.5%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Saudi Arabia	20.7%	22.5%	23.9%	24.2%	26.4%	26.8%	29.6%	28.4%	28.3%	28.4%	28.7%	28.9%	29.3%	29.6%
Iran	4.5%	4.7%	4.7%	4.8%	4.5%	3.7%	3.3%	3.2%	3.1%	3.1%	3.2%	3.0%	2.8%	2.5%
United Arab Emirates	20.4%	20.1%	19.6%	19.4%	18.5%	18.0%	18.0%	16.9%	17.5%	17.6%	17.9%	18.3%	18.6%	19.3%
Israel	29.6%	28.3%	28.5%	29.6%	29.0%	29.6%	28.6%	30.3%	30.3%	30.1%	29.9%	29.7%	30.2%	30.7%
Iraq	7.6%	7.4%	7.3%	6.4%	6.5%	6.6%	6.3%	7.5%	6.8%	6.7%	6.6%	6.4%	5.9%	5.4%
Qatar	4.7%	4.7%	4.4%	4.1%	3.6%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.5%	3.2%	2.8%
Other Countries	12.5%	12.3%	11.5%	11.5%	11.6%	11.8%	10.8%	10.3%	10.5%	10.5%	10.2%	10.1%	10.0%	9.7%

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SPECIALIZED DESIGN SERVICES
NORTH AFRICA

Kentley Insights

The North Africa Specialized Design Services market size is forecast at $609.1 million in 2026, up 10.3% from 2025, and projected to reach $751.8 million by 2030, a 5.4% CAGR. Largest market: Egypt (49% of 2026 sales).

NORTH AFRICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	318	361	395	421	473	504	509	464	489	502	523	552	609	752
Market Growth (%)		13.7%	9.4%	6.4%	12.5%	6.5%	0.9%	-8.8%	5.3%	2.6%	4.2%	5.7%	10.3%	5.4%

NORTH AFRICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Egypt	156.3	176.2	194.9	212.2	239.4	252.6	251.2	229.1	240.4	244.6	256.4	270.9	299.1	378.4
Algeria	66.8	77.6	88.2	95.9	108.6	115.7	119.6	106.9	112.7	118.8	126.1	132.5	145.8	172.2
Morocco	48.4	55.9	61.7	64.2	73.0	77.3	78.5	73.0	76.9	77.8	82.6	87.7	97.5	121.2
Sudan	13.4	15.2	17.0	17.8	20.0	21.9	21.9	20.4	21.6	22.2	17.6	18.3	19.6	25.8
Tunisia	16.0	18.2	20.3	21.6	23.9	26.3	27.2	25.4	27.1	28.0	29.2	30.3	32.8	36.8
Libya	16.4	17.7	12.3	8.1	7.5	9.4	9.6	8.5	9.1	9.4	10.0	11.7	13.2	16.1
South Sudan	0.6	0.7	0.8	0.8	0.8	0.9	0.8	0.8	0.9	0.9	0.7	1.0	1.1	1.3

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Egypt	12.7%	10.6%	8.8%	12.8%	5.5%	-0.6%	-8.8%	5.0%	1.7%	4.8%	5.6%	10.4%	6.0%
Algeria	16.0%	13.7%	8.6%	13.3%	6.5%	3.3%	-10.6%	5.5%	5.4%	6.1%	5.0%	10.0%	4.3%
Morocco	15.5%	10.4%	4.0%	13.7%	5.8%	1.5%	-7.0%	5.4%	1.1%	6.2%	6.1%	11.1%	5.6%
Sudan	13.6%	11.8%	4.9%	12.3%	9.4%	0.0%	-6.8%	5.6%	3.0%	-21.0%	4.4%	6.9%	7.1%
Tunisia	13.8%	11.4%	6.5%	10.7%	9.9%	3.5%	-6.8%	7.0%	3.3%	4.0%	3.7%	8.3%	2.9%
Libya	7.6%	-30.1%	-34.1%	-8.3%	25.9%	2.0%	-11.0%	6.1%	3.5%	6.6%	17.1%	12.9%	5.0%
South Sudan	18.5%	14.5%	2.6%	0.7%	6.7%	-2.8%	-8.6%	13.5%	1.3%	-23.7%	47.3%	10.3%	5.0%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Egypt	49.2%	48.8%	49.3%	50.4%	50.6%	50.1%	49.4%	49.4%	49.2%	48.8%	49.1%	49.0%	49.1%	50.3%
Algeria	21.0%	21.5%	22.3%	22.8%	23.0%	23.0%	23.5%	23.0%	23.1%	23.7%	24.1%	24.0%	23.9%	22.9%
Morocco	15.2%	15.5%	15.6%	15.3%	15.4%	15.3%	15.4%	15.7%	15.7%	15.5%	15.8%	15.9%	16.0%	16.1%
Sudan	4.2%	4.2%	4.3%	4.2%	4.2%	4.3%	4.3%	4.4%	4.4%	4.4%	3.4%	3.3%	3.2%	3.4%
Tunisia	5.0%	5.0%	5.1%	5.1%	5.1%	5.2%	5.3%	5.5%	5.6%	5.6%	5.6%	5.5%	5.4%	4.9%
Libya	5.2%	4.9%	3.1%	1.9%	1.6%	1.9%	1.9%	1.8%	1.9%	1.9%	1.9%	2.1%	2.2%	2.1%
South Sudan	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.1%	0.2%	0.2%	0.2%

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SPECIALIZED DESIGN SERVICES
WESTERN AFRICA

Kentley Insights

The Western Africa Specialized Design Services market size is forecast at $730.3 million in 2026, up 11.4% from 2025, and projected to reach $945.9 million by 2030, a 6.7% CAGR. Largest market: Ivory Coast (43% of 2026 sales).

WESTERN AFRICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	418	443	507	507	525	569	548	509	551	571	615	656	730	946
Market Growth (%)		6.0%	14.4%	0.2%	3.4%	8.4%	-3.7%	-7.1%	8.3%	3.5%	7.7%	6.7%	11.4%	6.7%

WESTERN AFRICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Nigeria	214.7	242.5	254.5	251.7	249.8	261.2	243.4	219.8	237.3	239.7	255.4	268.8	296.6	365.3
Ghana	12.6	13.8	13.8	14.0	13.9	15.2	14.4	14.6	14.3	14.7	15.9	17.1	18.9	24.1
Ivory Coast	139.6	130.7	169.8	174.1	190.8	224.4	217.5	205.4	223.5	236.6	256.6	276.4	310.8	420.9
Senegal	15.3	13.5	19.0	19.2	20.2	19.5	21.7	21.7	23.9	24.6	26.7	29.1	31.6	37.7
Mali	5.0	5.6	8.2	7.6	8.0	9.1	10.5	10.1	11.2	11.8	12.7	13.5	15.1	19.5
Burkina Faso	1.7	1.6	2.4	2.1	2.3	2.5	2.7	2.8	3.0	3.2	3.5	3.7	4.1	5.2
Other Countries	29.2	35.3	39.0	38.7	39.7	36.7	37.2	34.4	38.1	40.2	43.9	47.1	53.1	73.3

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Nigeria	12.9%	4.9%	-1.1%	-0.7%	4.6%	-6.8%	-9.7%	7.9%	1.0%	6.5%	5.2%	10.3%	5.3%
Ghana	9.1%	-0.1%	2.0%	-1.0%	9.5%	-5.0%	1.1%	-2.1%	2.9%	8.2%	7.2%	11.0%	6.2%
Ivory Coast	-6.3%	29.9%	2.5%	9.6%	17.6%	-3.0%	-5.6%	8.8%	5.9%	8.4%	7.7%	12.4%	7.9%
Senegal	-11.8%	41.0%	1.4%	5.1%	-3.6%	11.3%	0.0%	10.0%	2.8%	8.5%	9.1%	8.4%	4.5%
Mali	12.8%	46.1%	-6.5%	4.4%	14.5%	14.5%	-3.3%	10.8%	5.8%	7.4%	6.1%	11.7%	6.6%
Burkina Faso	-4.0%	53.1%	-14.4%	9.0%	8.9%	10.2%	3.4%	7.2%	6.5%	7.2%	6.2%	11.1%	6.1%
Other Countries	20.9%	10.6%	-0.7%	2.5%	-7.5%	1.2%	-7.5%	10.9%	5.4%	9.2%	7.4%	12.8%	8.4%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Nigeria	51.4%	54.7%	50.2%	49.6%	47.6%	45.9%	44.5%	43.2%	43.0%	42.0%	41.6%	41.0%	40.6%	38.6%
Ghana	3.0%	3.1%	2.7%	2.8%	2.6%	2.7%	2.6%	2.9%	2.6%	2.6%	2.6%	2.6%	2.6%	2.5%
Ivory Coast	33.4%	29.5%	33.5%	34.3%	36.4%	39.5%	39.7%	40.4%	40.5%	41.4%	41.7%	42.2%	42.6%	44.5%
Senegal	3.7%	3.0%	3.7%	3.8%	3.9%	3.4%	4.0%	4.3%	4.3%	4.3%	4.3%	4.4%	4.3%	4.0%
Mali	1.2%	1.3%	1.6%	1.5%	1.5%	1.6%	1.9%	2.0%	2.0%	2.1%	2.1%	2.1%	2.1%	2.1%
Burkina Faso	0.4%	0.4%	0.5%	0.4%	0.4%	0.4%	0.5%	0.6%	0.5%	0.6%	0.6%	0.6%	0.6%	0.5%
Other Countries	7.0%	8.0%	7.7%	7.6%	7.6%	6.5%	6.8%	6.8%	6.9%	7.0%	7.1%	7.2%	7.3%	7.7%

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SPECIALIZED DESIGN SERVICES
CENTRAL AFRICA

Kentley Insights

The Central Africa Specialized Design Services market size is forecast at $180.3 million in 2026, up 9.6% from 2025, and projected to reach $218.7 million by 2030, a 5.0% CAGR. Largest market: Angola (39% of 2026 sales).

CENTRAL AFRICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	91	104	110	113	136	150	151	136	142	147	157	165	180	219
Market Growth (%)		13.7%	6.4%	2.5%	20.0%	10.2%	0.6%	-9.5%	4.5%	3.3%	7.0%	4.6%	9.6%	5.0%

CENTRAL AFRICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Angola	35.3	40.6	43.4	44.8	53.2	58.9	59.4	53.6	56.1	58.3	62.7	65.4	71.0	83.1
Congo (DR)	20.4	23.3	24.2	24.7	30.2	33.7	33.6	29.8	31.0	32.2	34.9	37.3	41.9	54.5
Cameroon	15.2	17.0	18.3	19.3	21.3	23.0	23.0	20.9	22.0	22.4	23.8	24.8	27.2	33.5
Gabon	6.5	7.2	7.8	7.8	9.3	10.2	10.4	9.6	10.0	10.4	11.0	11.4	12.4	14.6
Congo	4.9	5.5	6.0	6.0	7.2	7.8	8.1	7.4	7.6	7.7	8.0	8.3	9.1	10.9
Equatorial Guinea	3.2	3.6	3.7	3.8	5.3	5.9	5.9	5.5	5.8	5.9	6.1	5.8	6.0	6.4
Other Countries	5.8	6.6	7.0	6.7	9.3	10.2	10.2	9.4	9.8	10.0	10.7	11.4	12.7	15.8

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Angola	14.9%	7.0%	3.2%	18.7%	10.6%	0.9%	-9.7%	4.7%	3.9%	7.4%	4.3%	8.5%	4.0%
Congo (DR)	13.9%	4.0%	2.0%	22.0%	11.6%	-0.3%	-11.2%	4.0%	3.8%	8.5%	6.9%	12.1%	6.8%
Cameroon	12.0%	7.8%	5.3%	10.3%	8.2%	-0.3%	-9.0%	5.2%	2.1%	5.9%	4.3%	9.5%	5.3%
Gabon	11.9%	7.2%	0.9%	19.4%	8.6%	2.3%	-7.8%	4.2%	4.3%	5.8%	3.7%	8.9%	4.0%
Congo	11.6%	8.5%	0.4%	19.2%	9.5%	2.7%	-8.1%	2.8%	1.1%	4.5%	3.6%	9.0%	4.7%
Equatorial Guinea	12.5%	3.9%	2.5%	40.7%	9.7%	1.3%	-7.5%	6.2%	1.8%	3.3%	-5.2%	3.5%	1.5%
Other Countries	14.2%	5.2%	-3.7%	38.4%	9.5%	-0.1%	-7.8%	3.9%	2.2%	7.1%	6.6%	11.1%	5.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Angola	38.7%	39.1%	39.3%	39.6%	39.2%	39.3%	39.5%	39.4%	39.5%	39.7%	39.9%	39.7%	39.4%	38.0%
Congo (DR)	22.4%	22.4%	21.9%	21.8%	22.2%	22.5%	22.3%	21.9%	21.8%	21.9%	22.2%	22.7%	23.2%	24.9%
Cameroon	16.6%	16.4%	16.6%	17.0%	15.7%	15.4%	15.3%	15.3%	15.4%	15.3%	15.1%	15.1%	15.1%	15.3%
Gabon	7.1%	7.0%	7.0%	6.9%	6.9%	6.8%	6.9%	7.0%	7.0%	7.1%	7.0%	6.9%	6.9%	6.7%
Congo	5.4%	5.3%	5.4%	5.3%	5.3%	5.2%	5.3%	5.4%	5.3%	5.2%	5.1%	5.1%	5.0%	5.0%
Equatorial Guinea	3.5%	3.4%	3.4%	3.4%	3.9%	3.9%	3.9%	4.0%	4.1%	4.0%	3.9%	3.5%	3.3%	2.9%
Other Countries	6.4%	6.4%	6.3%	6.0%	6.9%	6.8%	6.8%	6.9%	6.9%	6.8%	6.8%	6.9%	7.0%	7.2%

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SPECIALIZED DESIGN SERVICES
EASTERN AFRICA

Kentley Insights

The Eastern Africa Specialized Design Services market size is forecast at $182.8 million in 2026, up 12.1% from 2025, and projected to reach $241.0 million by 2030, a 7.2% CAGR. Largest market: Kenya (24% of 2026 sales).

EASTERN AFRICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	93	106	114	117	124	136	132	124	137	141	152	163	183	241
Market Growth (%)		13.1%	8.3%	2.7%	5.6%	9.7%	-3.4%	-5.6%	10.2%	3.2%	7.9%	7.0%	12.1%	7.2%

EASTERN AFRICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Kenya	23.1	25.7	27.6	28.4	29.5	32.9	29.4	28.9	32.1	34.4	36.8	39.1	43.3	54.9
Ethiopia	15.2	18.4	21.7	22.5	23.3	25.8	26.8	24.7	26.6	26.8	29.6	32.7	37.8	54.5
Tanzania	4.2	5.2	6.3	7.1	7.7	8.7	9.4	9.1	10.2	10.6	11.4	12.3	13.7	18.4
Uganda	16.6	17.5	16.1	15.3	16.1	18.0	17.6	17.0	20.8	21.9	23.7	25.6	29.2	40.0
Zambia	3.2	3.5	3.8	4.0	4.1	4.2	4.6	4.2	5.2	5.3	5.6	5.9	6.5	8.2
Zimbabwe	4.8	5.3	5.9	6.1	6.1	6.4	5.9	5.1	5.4	4.8	5.0	5.4	6.0	7.4
Other Countries	26.4	30.0	33.0	34.1	37.2	40.2	37.9	35.2	36.7	37.6	40.2	42.1	46.3	57.6

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Kenya	11.3%	7.2%	2.9%	4.1%	11.3%	-10.4%	-1.9%	10.9%	7.2%	7.1%	6.1%	10.7%	6.1%
Ethiopia	21.3%	17.6%	3.7%	3.8%	10.8%	3.7%	-7.8%	7.7%	0.8%	10.5%	10.4%	15.4%	9.6%
Tanzania	23.3%	21.1%	13.7%	8.6%	12.1%	8.5%	-2.9%	11.5%	4.1%	7.9%	7.1%	12.1%	7.5%
Uganda	5.9%	-7.9%	-5.2%	5.3%	11.5%	-1.8%	-3.7%	22.4%	5.3%	8.4%	7.9%	13.7%	8.3%
Zambia	8.9%	10.5%	5.3%	1.2%	3.6%	7.9%	-7.7%	22.7%	1.5%	6.2%	5.0%	10.5%	6.1%
Zimbabwe	11.7%	10.4%	3.3%	0.1%	5.5%	-8.2%	-12.8%	5.3%	-11.7%	4.1%	8.7%	11.2%	5.4%
Other Countries	13.5%	10.0%	3.3%	9.1%	8.1%	-5.8%	-6.9%	4.2%	2.4%	7.0%	4.7%	9.9%	5.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Kenya	24.7%	24.3%	24.1%	24.1%	23.8%	24.1%	22.4%	23.2%	23.4%	24.3%	24.2%	24.0%	23.7%	22.8%
Ethiopia	16.3%	17.4%	18.9%	19.1%	18.8%	19.0%	20.3%	19.8%	19.4%	19.0%	19.4%	20.1%	20.7%	22.6%
Tanzania	4.5%	4.9%	5.5%	6.1%	6.2%	6.4%	7.1%	7.3%	7.4%	7.5%	7.5%	7.5%	7.5%	7.6%
Uganda	17.7%	16.6%	14.1%	13.0%	13.0%	13.2%	13.4%	13.7%	15.2%	15.5%	15.6%	15.7%	15.9%	16.6%
Zambia	3.4%	3.3%	3.4%	3.4%	3.3%	3.1%	3.5%	3.4%	3.8%	3.7%	3.7%	3.6%	3.5%	3.4%
Zimbabwe	5.1%	5.1%	5.2%	5.2%	4.9%	4.7%	4.5%	4.1%	4.0%	3.4%	3.3%	3.3%	3.3%	3.1%
Other Countries	28.3%	28.4%	28.8%	29.0%	30.0%	29.5%	28.8%	28.4%	26.8%	26.6%	26.4%	25.8%	25.3%	23.9%

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SPECIALIZED DESIGN SERVICES
SOUTHERN AFRICA

Kentley Insights

The Southern Africa Specialized Design Services market size is forecast at $187.1 million in 2026, up 7.5% from 2025, and projected to reach $210.0 million by 2030, a 2.9% CAGR. Largest market: South Africa (93% of 2026 sales).

SOUTHERN AFRICA MARKET SIZE ($ MILLIONS)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Market Size ($ M)	131	143	150	151	150	159	158	151	164	165	170	174	187	210
Market Growth (%)		9.0%	5.1%	0.7%	-0.9%	5.8%	-0.5%	-4.2%	8.4%	0.8%	2.9%	2.3%	7.5%	2.9%

SOUTHERN AFRICA MARKET SIZE BY COUNTRY

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
South Africa	123.1	133.6	140.8	141.5	140.5	148.6	147.7	141.2	152.9	153.8	158.3	162.0	173.8	193.8
Botswana	4.6	5.1	5.5	5.7	5.7	6.2	6.1	5.9	6.5	6.7	6.7	6.7	7.4	9.3
Namibia	1.3	1.6	1.5	1.5	1.5	1.4	1.3	1.2	1.3	1.4	1.5	1.5	1.7	1.9
Eswatini	1.9	2.3	2.1	2.4	2.1	2.3	2.5	2.7	3.1	3.2	3.3	3.5	3.9	4.6
Lesotho	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.4

Market Growth (%)	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
South Africa	8.5%	5.4%	0.5%	-0.7%	5.7%	-0.6%	-4.4%	8.3%	0.6%	2.9%	2.3%	7.2%	2.8%
Botswana	10.6%	7.1%	3.2%	0.1%	8.8%	-0.7%	-2.9%	8.7%	3.5%	-0.6%	0.3%	10.9%	5.8%
Namibia	23.4%	-0.9%	-3.6%	-2.3%	-1.7%	-7.9%	-8.3%	10.6%	3.6%	6.1%	3.6%	8.6%	4.1%
Eswatini	24.4%	-8.4%	12.0%	-12.8%	10.8%	10.3%	5.5%	14.6%	3.2%	5.4%	4.8%	10.2%	4.6%
Lesotho	4.0%	2.4%	-2.1%	-2.7%	-1.6%	-1.1%	-11.7%	2.3%	0.3%	7.3%	2.6%	7.3%	2.6%

Market Share (%)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
South Africa	93.8%	93.4%	93.7%	93.5%	93.6%	93.5%	93.5%	93.3%	93.2%	93.0%	93.1%	93.1%	92.9%	92.3%
Botswana	3.5%	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%	3.9%	3.9%	4.0%	3.9%	3.8%	4.0%	4.4%
Namibia	1.0%	1.1%	1.0%	1.0%	1.0%	0.9%	0.8%	0.8%	0.8%	0.8%	0.9%	0.9%	0.9%	0.9%
Eswatini	1.4%	1.6%	1.4%	1.6%	1.4%	1.4%	1.6%	1.8%	1.9%	1.9%	2.0%	2.0%	2.1%	2.2%
Lesotho	0.3%	0.3%	0.3%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%

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SPECIALIZED DESIGN SERVICES
GLOBAL REGIONS

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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
THE AMERICAS	31,246	33,875	35,811	36,581	37,126	39,953	40,173	39,763	44,875	47,390	49,835	51,504	55,886	63,840
NORTH AMERICA	27,661	29,989	31,810	32,533	33,038	35,657	36,385	35,756	40,350	42,629	44,850	46,339	50,282	57,336
SOUTH AMERICA	2,687	2,881	2,944	2,960	2,950	3,060	2,576	2,850	3,225	3,403	3,561	3,701	4,020	4,672
CENTRAL AMERICA	591	671	711	733	768	837	826	813	906	954	996	1,025	1,112	1,288
CARIBBEAN	306	334	346	355	370	399	387	344	394	404	427	438	472	544
ASIA & OCEANIA	19,631	21,988	23,691	23,835	24,283	26,748	26,862	25,452	27,967	28,857	30,576	32,182	35,326	42,323
EASTERN ASIA	15,178	16,887	17,958	17,983	18,109	19,816	19,867	18,680	20,354	21,016	22,237	23,364	25,590	30,254
SOUTHERN ASIA	1,334	1,598	1,930	1,868	2,050	2,386	2,410	2,356	2,627	2,714	2,955	3,197	3,591	4,787
SOUTHEAST ASIA	1,233	1,387	1,475	1,542	1,588	1,754	1,703	1,605	1,832	1,871	2,012	2,138	2,366	2,941
AUSTRALASIA	1,779	1,994	2,190	2,284	2,364	2,595	2,674	2,615	2,940	3,004	3,102	3,194	3,458	3,950
CENTRAL ASIA	83	99	111	133	148	174	184	177	190	228	245	263	292	356
OTHER OCEANIA	25	24	26	25	24	23	24	19	23	24	25	27	29	34
EUROPE	18,597	20,815	22,076	23,136	24,038	26,009	26,852	25,813	28,736	30,300	31,443	32,265	34,665	38,466
WESTERN EUROPE	9,829	10,850	11,558	11,738	11,948	12,818	12,989	12,398	13,553	13,844	14,248	14,536	15,577	17,121
SOUTHERN EUROPE	2,542	2,824	3,010	3,142	3,283	3,632	3,630	3,520	3,989	4,320	4,506	4,625	4,968	5,464
UK & IRELAND	2,321	2,713	2,837	3,294	3,562	3,735	4,362	4,265	4,770	4,997	5,182	5,367	5,754	6,385
EASTERN EUROPE	1,894	2,224	2,350	2,576	2,770	3,081	3,085	2,967	3,362	3,811	4,033	4,150	4,480	5,064
NORTHERN EUROPE	1,388	1,517	1,612	1,664	1,741	1,919	1,968	1,883	2,176	2,366	2,461	2,531	2,734	3,069
SE EUROPE	622	687	710	722	734	824	817	781	886	961	1,015	1,057	1,153	1,363
AFRICA & MID. EAST	2,541	2,844	3,173	3,260	3,412	3,602	3,549	3,423	3,782	3,815	4,002	4,209	4,586	5,562
MIDDLE EAST	1,489	1,687	1,896	1,950	2,004	2,085	2,053	2,038	2,298	2,289	2,385	2,499	2,697	3,194
SOUTHERN AFRICA	131	143	150	151	150	159	158	151	164	165	170	174	187	210
NORTH AFRICA	318	361	395	421	473	504	509	464	489	502	523	552	609	752
EASTERN AFRICA	93	106	114	117	124	136	132	124	137	141	152	163	183	241
CENTRAL AFRICA	91	104	110	113	136	150	151	136	142	147	157	165	180	219

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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
WORLD	72,015	79,523	84,751	86,813	88,860	96,312	97,437	94,451	105,359	110,362	115,856	120,160	130,463	150,191
THE AMERICAS	31,246	33,875	35,811	36,581	37,126	39,953	40,173	39,763	44,875	47,390	49,835	51,504	55,886	63,840
NORTH AMERICA	27,661	29,989	31,810	32,533	33,038	35,657	36,385	35,756	40,350	42,629	44,850	46,339	50,282	57,336
United States	26,256	28,504	30,120	30,873	31,459	33,947	34,682	34,074	38,558	40,760	42,898	44,330	48,117	54,907
Canada	1,395.4	1,474.3	1,678.6	1,648.6	1,567.9	1,698.1	1,692.3	1,671.6	1,780.4	1,857.1	1,939.7	1,996.7	2,151.3	2,413.7
Bermuda	7.9	9.0	9.4	9.4	9.1	9.5	8.0	8.4	9.0	9.5	10.0	10.3	11.2	12.7
Greenland	2.2	2.0	2.1	2.1	1.9	2.0	2.1	2.0	2.2	2.3	2.4	2.5	2.7	3.0
SOUTH AMERICA	2,687	2,881	2,944	2,960	2,950	3,060	2,576	2,850	3,225	3,403	3,561	3,701	4,020	4,672
Brazil	1,126.4	1,193.3	1,217.8	1,230.2	1,243.7	1,270.8	1,103.4	1,241.1	1,409.9	1,511.2	1,599.5	1,656.1	1,791.0	2,054.0
Argentina	516.3	558.0	579.3	584.6	572.1	579.5	362.0	446.0	510.5	513.7	519.6	548.9	602.4	729.4
Colombia	163.8	173.4	176.2	173.5	178.4	192.1	181.4	182.4	204.8	204.6	212.6	220.8	239.6	279.2
Chile	397.2	448.2	484.1	500.1	510.3	558.2	499.3	519.1	586.9	625.5	657.1	680.3	739.1	852.0
Peru	80.4	90.3	96.5	98.5	101.1	110.5	91.5	97.9	104.9	105.3	111.5	116.7	127.3	148.4
Venezuela	209.6	208.1	175.4	142.6	109.7	91.8	85.5	93.8	104.6	113.4	122.2	125.5	138.3	166.8
Ecuador	83.2	90.5	94.6	104.9	109.4	123.7	129.8	137.3	153.4	165.7	166.6	174.8	190.1	221.7
Uruguay	53.0	56.1	56.7	60.7	60.4	64.0	62.7	66.3	74.4	82.1	86.8	89.5	96.7	110.5
Paraguay	24.8	27.2	27.8	28.7	28.6	30.3	26.5	29.2	33.7	37.2	39.8	42.7	47.2	57.3
Bolivia	28.1	30.8	30.8	31.1	31.3	33.2	29.5	31.9	35.6	38.0	38.5	38.5	39.6	42.0
French Guiana	3.2	3.5	3.6	3.6	3.5	3.7	3.2	3.5	4.0	4.4	4.7	4.8	5.2	5.9
Guyana	0.3	0.4	0.4	0.4	0.4	0.5	0.4	0.4	0.5	0.8	1.1	1.3	1.6	2.9
Suriname	0.9	1.0	0.9	1.1	1.2	1.2	0.9	1.1	1.2	1.3	1.4	1.4	1.6	2.2
CENTRAL AMERICA	591	671	711	733	768	837	826	813	906	954	996	1,025	1,112	1,288
Mexico	428.0	480.0	501.6	524.5	549.1	593.9	595.3	587.7	654.0	686.1	712.5	725.6	782.5	888.0
Guatemala	30.7	34.4	35.3	36.6	38.3	41.4	40.6	40.3	43.9	45.1	47.9	50.4	55.6	67.8
Panama	34.3	39.4	41.3	41.1	42.5	47.9	37.2	40.6	48.9	48.5	51.0	53.9	59.3	72.9
Costa Rica	55.0	70.1	81.8	80.8	89.0	103.2	108.1	102.2	114.7	127.2	135.5	143.4	157.5	190.1
El Salvador	11.5	13.3	14.0	13.8	14.2	14.8	13.3	12.9	13.8	14.4	15.1	15.8	17.3	20.6
Honduras	15.3	16.9	18.1	18.7	18.8	20.7	18.1	18.6	20.3	21.5	22.8	23.9	26.2	31.7
Nicaragua	15.4	16.7	18.7	16.9	15.1	14.9	13.2	9.6	10.0	10.4	11.0	11.7	12.9	15.6
Belize	0.6	0.7	0.7	0.7	0.7	0.6	0.5	0.5	0.5	0.6	0.6	0.6	0.7	0.8

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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
CARIBBEAN	306	334	346	355	370	399	387	344	394	404	427	438	472	544
Puerto Rico	73.8	80.3	84.3	85.6	86.7	92.1	90.0	82.4	91.0	94.3	99.6	100.0	106.2	113.8
Cuba	93.9	103.3	108.4	112.0	114.4	120.6	118.5	106.1	118.0	122.4	128.3	132.8	143.1	164.5
Dominican Republic	69.6	75.4	73.4	76.0	85.3	94.2	88.6	71.9	91.1	94.2	101.3	104.6	115.0	144.3
Trinidad and Tobago	9.9	9.4	9.6	10.0	10.8	11.9	10.8	8.1	10.7	10.7	11.3	11.5	12.3	14.2
Jamaica	10.7	11.7	12.3	12.5	12.5	13.3	11.8	12.0	13.7	13.1	13.4	13.5	14.2	15.4
The Bahamas	7.3	8.5	8.7	9.2	8.9	11.4	9.5	9.9	11.3	10.2	10.8	11.2	12.2	13.8
Guadeloupe	6.1	6.6	7.1	7.2	7.5	8.1	8.0	7.3	8.0	8.2	8.6	8.8	9.5	10.5
Haiti	2.2	2.6	3.1	3.2	3.3	3.7	3.8	3.5	3.9	3.9	3.8	3.8	4.0	4.2
Martinique	5.2	5.7	6.1	6.4	6.6	7.2	7.6	7.4	8.1	8.0	8.5	8.8	9.5	11.1
Cayman Islands	12.1	13.5	14.5	15.0	15.3	16.5	17.7	16.9	18.1	18.3	19.2	19.8	21.3	24.1
Barbados	3.5	3.8	4.1	4.2	4.3	4.5	4.4	4.1	4.6	4.6	4.8	5.0	5.5	6.3
Virgin Islands	2.7	2.9	3.2	3.2	3.3	3.6	3.6	3.3	3.7	3.9	4.1	4.2	4.5	5.1
Aruba	1.3	1.4	1.5	1.5	1.6	1.6	1.7	1.5	1.7	1.7	1.8	2.0	2.1	2.4
Curaçao	1.0	1.1	1.1	1.2	1.2	1.3	1.3	1.2	1.3	1.3	1.4	1.5	1.6	1.8
St Lucia	0.4	0.5	0.5	0.5	0.5	0.5	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.6
Antigua and Barbuda	0.3	0.3	0.3	0.4	0.4	0.3	0.4	0.3	0.3	0.3	0.3	0.3	0.4	0.4
British Virgin Islands	1.6	1.6	1.8	1.8	2.5	2.8	2.8	2.5	2.8	2.8	3.0	3.1	3.3	3.7
Grenada	0.9	0.9	1.0	1.0	1.0	1.1	1.0	0.9	1.0	1.0	1.0	1.1	1.2	1.4
Turks & Caicos Isl.	0.7	0.8	0.8	0.8	0.8	0.9	0.9	0.8	0.9	0.9	1.0	1.0	1.1	1.3
St Kitts and Nevis	0.5	0.6	0.7	0.7	0.7	0.8	0.7	0.7	0.8	0.8	0.8	0.9	0.9	1.1
Sint Maarten (Dutch)	1.1	1.2	1.2	1.2	1.1	1.0	1.2	1.1	1.3	1.3	1.3	1.4	1.5	1.7
Saint Martin (French)	0.6	0.6	0.6	0.7	0.6	0.6	0.6	0.6	0.7	0.7	0.7	0.8	0.8	0.9
St Vincent & Grenadines	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.4
Dominica	0.4	0.5	0.5	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.7
Anguilla	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.5
ASIA & OCEANIA	19,631	21,988	23,691	23,835	24,283	26,748	26,862	25,452	27,967	28,857	30,576	32,182	35,326	42,323
EASTERN ASIA	15,178	16,887	17,958	17,983	18,109	19,816	19,867	18,680	20,354	21,016	22,237	23,364	25,590	30,254
China	9,540	10,602	11,313	11,280	11,289	12,036	12,284	11,408	12,371	12,830	13,785	14,645	16,204	19,898
Japan	3,739.5	4,185.1	4,469.7	4,516.8	4,620.7	5,316.1	5,194.3	5,008.2	5,514.2	5,625.1	5,751.4	5,891.6	6,300.6	6,786.0
South Korea	1,076.6	1,184.0	1,216.3	1,215.7	1,209.6	1,402.6	1,384.4	1,318.3	1,447.5	1,507.0	1,574.0	1,609.2	1,740.2	1,981.6
Taiwan	544.0	609.0	652.4	662.1	678.3	703.9	654.8	617.8	658.1	681.2	733.9	806.9	899.2	1,073.7
Hong Kong	273.9	302.6	303.3	304.9	308.0	353.4	345.0	324.0	358.0	368.1	386.6	405.0	440.0	506.3
Mongolia	3.3	3.8	3.7	3.7	3.7	4.6	4.4	4.3	4.9	5.0	5.3	5.8	6.4	8.2

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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
SOUTHERN ASIA	1,334	1,598	1,930	1,868	2,050	2,386	2,410	2,356	2,627	2,714	2,955	3,197	3,591	4,787
India	1,101.8	1,335.5	1,637.1	1,553.9	1,715.4	2,014.5	2,020.9	1,984.0	2,220.4	2,291.1	2,509.8	2,731.5	3,079.6	4,155.5
Pakistan	192.4	220.4	248.6	268.2	287.7	320.7	338.2	323.3	357.3	372.4	391.2	408.1	448.3	554.2
Bangladesh	9.7	10.8	11.6	12.0	12.3	13.4	14.0	13.3	14.6	15.7	16.8	17.6	19.5	25.4
Sri Lanka	18.5	18.5	19.6	19.9	20.3	22.3	21.9	20.8	18.3	18.5	19.9	21.0	23.0	27.3
Nepal	4.6	5.3	5.6	6.1	6.3	6.9	7.1	6.5	7.1	7.3	7.8	8.2	9.0	11.2
Afghanistan	5.2	5.4	5.6	5.6	5.5	5.9	5.9	5.6	6.3	6.5	6.8	7.1	7.8	9.4
Maldives	1.1	1.1	1.2	1.2	1.2	1.2	0.8	1.0	1.2	1.3	1.3	1.4	1.6	1.9
Bhutan	0.9	1.0	1.1	1.1	1.1	1.2	1.2	1.2	1.3	1.4	1.5	1.6	1.8	2.5
SOUTHEAST ASIA	1,233	1,387	1,475	1,542	1,588	1,754	1,703	1,605	1,832	1,871	2,012	2,138	2,366	2,941
Indonesia	373.9	432.8	457.1	474.8	484.3	532.1	531.0	519.7	585.3	593.4	637.5	677.9	754.2	964.2
Thailand	158.4	168.3	171.5	180.8	183.4	195.0	187.6	163.6	174.6	177.7	187.2	194.1	209.1	238.9
Singapore	308.9	355.3	375.9	390.4	396.6	445.4	406.7	384.0	456.3	455.1	490.3	520.9	571.7	670.8
Malaysia	105.5	115.2	129.5	140.6	152.4	174.0	161.8	136.5	167.7	181.0	194.6	207.2	229.8	285.2
Philippines	126.9	136.5	145.2	149.4	155.1	169.6	164.0	160.0	179.4	182.0	196.9	208.0	229.5	297.5
Vietnam	118.5	135.8	151.0	160.7	169.5	188.4	202.3	192.3	215.1	226.0	247.3	270.2	306.2	406.3
Burma	20.3	22.1	23.6	24.4	25.0	27.4	26.9	26.0	28.9	30.0	30.4	30.2	33.0	38.3
Cambodia	9.3	10.2	10.8	11.0	11.6	12.4	12.1	11.9	13.1	13.7	14.9	15.8	17.5	22.1
Laos	6.4	6.2	5.9	5.8	5.8	5.8	6.2	6.2	6.8	6.9	7.4	7.9	8.7	10.3
Brunei	3.7	3.4	3.2	3.2	3.2	3.1	3.3	3.4	3.7	3.8	4.0	4.1	4.4	5.2
East Timor	0.9	1.0	1.0	1.1	1.1	1.2	1.3	1.3	1.4	1.5	1.6	1.6	1.8	2.2
AUSTRALASIA	1,779	1,994	2,190	2,284	2,364	2,595	2,674	2,615	2,940	3,004	3,102	3,194	3,458	3,950
Australia	1,481.1	1,670.7	1,848.3	1,927.8	1,998.2	2,201.7	2,279.0	2,232.8	2,521.2	2,566.1	2,654.5	2,740.5	2,966.4	3,386.9
New Zealand	297.9	322.8	342.0	356.0	365.6	393.1	394.8	382.5	419.3	437.6	447.0	453.4	491.3	563.5
CENTRAL ASIA	83	99	111	133	148	174	184	177	190	228	245	263	292	356
Kazakhstan	72.9	87.1	97.2	116.6	128.3	146.8	155.0	143.5	149.3	177.3	190.6	205.3	227.6	276.6
Uzbekistan	2.3	3.0	3.9	4.4	5.4	8.2	11.4	13.9	17.0	20.3	22.2	24.2	27.3	36.1
Turkmenistan	6.6	7.9	8.8	10.5	12.3	16.4	14.5	17.2	20.2	25.8	27.3	28.6	31.2	36.0
Kyrgyzstan	0.9	1.1	1.2	1.4	1.6	2.2	2.4	1.8	2.6	3.0	3.4	3.8	4.3	5.6
Tajikistan	0.3	0.3	0.3	0.4	0.4	0.6	0.5	0.6	1.0	1.2	1.4	1.5	1.7	2.2

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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
OTHER OCEANIA	25	24	26	25	24	23	24	19	23	24	25	27	29	34
Papua New Guinea	15.1	13.5	13.8	13.0	11.6	10.5	11.7	9.4	11.1	11.7	12.4	13.2	14.6	17.5
New Caledonia	2.6	2.8	3.2	3.3	3.4	3.1	3.5	2.7	3.4	3.4	3.6	3.7	4.0	4.5
Guam	1.7	1.8	2.1	2.2	2.4	2.2	2.5	2.0	2.4	2.5	2.6	2.7	3.0	3.4
French Polynesia	1.9	2.1	2.2	2.3	2.3	2.4	2.1	1.8	2.1	2.1	2.2	2.3	2.4	2.8
Fiji	1.7	1.9	2.1	2.1	2.1	2.2	1.9	1.5	1.8	1.8	1.9	2.0	2.2	2.5
N. Mariana Islands	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.4	0.4
Solomon Islands	0.4	0.5	0.5	0.5	0.6	0.5	0.6	0.5	0.6	0.6	0.6	0.6	0.7	0.8
Vanuatu	0.2	0.3	0.3	0.3	0.3	0.3	0.5	0.5	0.6	0.6	0.6	0.6	0.7	0.8
Samoa	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.4	0.4
American Samoa	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.4	0.4
Tonga	0.0	0.1	0.1	0.1	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Micronesia	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Cook Islands	0.2	0.2	0.2	0.3	0.4	0.3	0.2	0.1	0.2	0.2	0.2	0.2	0.2	0.3
Palau	0.0	0.0	0.1	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Marshall Islands	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kiribati	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
EUROPE	18,597	20,815	22,076	23,136	24,038	26,009	26,852	25,813	28,736	30,300	31,443	32,265	34,665	38,466
WESTERN EUROPE	9,829	10,850	11,558	11,738	11,948	12,818	12,989	12,398	13,553	13,844	14,248	14,536	15,577	17,121
Germany	3,703.5	4,049.6	4,295.5	4,401.2	4,452.1	4,808.0	4,745.1	4,498.1	4,925.7	5,019.8	5,117.5	5,191.0	5,556.7	6,075.8
France	2,953.6	3,290.2	3,491.9	3,524.2	3,587.7	3,845.7	3,939.6	3,786.1	4,230.9	4,366.7	4,521.5	4,618.2	4,948.1	5,436.9
Netherlands	1,265.2	1,368.3	1,428.3	1,418.2	1,481.3	1,547.2	1,623.2	1,521.0	1,527.1	1,548.6	1,603.6	1,653.9	1,777.0	1,966.7
Switzerland	734.5	809.3	862.3	893.8	906.1	972.7	979.1	956.7	1,062.1	1,077.1	1,118.5	1,146.9	1,233.4	1,372.8
Belgium	811.4	908.2	979.1	995.5	1,012.5	1,104.3	1,114.5	1,040.3	1,126.5	1,141.3	1,181.8	1,208.2	1,292.1	1,417.3
Austria	210.4	256.3	317.0	318.1	321.4	343.7	383.5	396.5	463.1	468.3	476.4	485.2	518.9	567.5
Luxembourg	123.8	139.4	153.3	156.4	156.5	164.5	171.4	166.8	182.5	186.5	191.8	195.4	210.7	239.1
Monaco	10.0	11.1	12.0	11.8	11.5	12.2	12.5	13.3	14.6	14.8	15.2	15.5	16.7	18.7
Liechtenstein	16.5	18.0	18.9	19.1	19.3	19.9	20.3	19.1	20.3	20.7	21.3	21.7	23.3	26.1
SOUTHERN EUROPE	2,542	2,824	3,010	3,142	3,283	3,632	3,630	3,520	3,989	4,320	4,506	4,625	4,968	5,464
Italy	1,621.2	1,821.4	1,920.7	1,987.3	2,053.8	2,253.2	2,204.3	2,135.9	2,371.5	2,562.2	2,645.4	2,691.3	2,872.8	3,097.8
Spain	815.9	869.6	929.0	971.4	1,043.6	1,166.7	1,196.9	1,148.2	1,345.6	1,466.0	1,553.1	1,615.8	1,750.6	1,974.2
Portugal	86.6	109.1	131.5	150.8	154.1	175.9	193.1	199.2	230.4	247.0	258.5	266.6	288.3	324.3
Malta	14.1	18.5	23.2	26.6	27.3	30.8	30.1	30.4	35.0	38.2	41.5	43.7	48.0	58.7
Andorra	2.3	2.6	2.9	3.1	3.0	3.4	3.7	3.7	4.1	4.4	4.5	4.6	4.9	5.5
San Marino	2.4	2.5	2.6	2.6	1.8	2.1	2.4	2.3	2.5	2.6	2.7	2.8	3.0	3.3

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SPECIALIZED DESIGN SERVICES
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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
UK & IRELAND	2,321	2,713	2,837	3,294	3,562	3,735	4,362	4,265	4,770	4,997	5,182	5,367	5,754	6,385
United Kingdom	2,046.1	2,400.7	2,491.4	2,930.9	3,200.4	3,342.4	3,953.4	3,867.5	4,330.5	4,530.9	4,691.5	4,810.6	5,149.4	5,685.8
Ireland	274.8	312.4	345.6	363.0	361.2	392.6	408.9	397.2	439.6	466.5	490.1	556.4	605.1	699.2
EASTERN EUROPE	1,894	2,224	2,350	2,576	2,770	3,081	3,085	2,967	3,362	3,811	4,033	4,150	4,480	5,064
Russia	896.1	1,044.3	1,072.6	1,160.3	1,242.4	1,330.4	1,380.9	1,313.8	1,550.4	1,773.5	1,903.8	1,946.4	2,089.3	2,293.1
Poland	381.1	456.8	500.4	543.0	596.2	668.4	647.4	643.7	726.4	824.4	869.3	911.3	998.3	1,174.2
Czech Republic	128.9	161.0	170.0	191.4	195.2	231.8	229.1	215.6	281.1	311.1	322.8	334.9	363.1	414.0
Romania	190.5	222.9	226.6	256.4	256.4	291.3	284.7	257.9	326.4	362.6	374.8	382.0	408.5	469.5
Hungary	103.0	124.1	149.0	175.3	211.0	257.1	254.5	256.1	204.3	245.9	253.4	257.6	278.0	318.7
Ukraine	91.6	86.8	94.8	99.4	104.0	112.3	99.5	94.8	64.1	62.6	66.1	68.1	73.7	88.8
Slovakia	71.8	85.5	91.2	101.0	110.5	126.1	123.3	120.9	133.7	147.6	154.1	157.2	168.0	189.5
Belarus	10.1	15.8	18.8	20.9	22.1	28.7	32.2	31.2	37.8	38.1	40.7	41.8	44.9	49.2
Azerbaijan	8.5	11.4	10.1	10.6	12.7	14.2	14.2	14.5	16.9	21.8	23.3	23.9	25.9	30.0
Georgia	7.1	7.8	8.5	9.0	9.5	10.6	9.6	8.9	8.8	10.4	11.6	12.6	14.1	18.0
Armenia	2.4	2.6	2.9	3.1	3.5	4.0	3.4	4.0	5.6	6.1	6.6	7.1	7.9	10.1
Moldova	3.5	4.5	5.3	5.8	6.0	6.4	5.8	5.4	6.0	6.8	7.0	7.3	7.9	9.3
NORTHERN EUROPE	1,388	1,517	1,612	1,664	1,741	1,919	1,968	1,883	2,176	2,366	2,461	2,531	2,734	3,069
Sweden	591.8	629.0	642.5	660.8	698.3	789.3	804.3	754.2	857.2	936.1	968.4	994.9	1,076.9	1,217.0
Norway	228.4	257.1	296.5	300.7	309.8	330.4	346.4	322.1	389.5	415.3	431.2	441.3	475.5	526.9
Denmark	343.7	377.7	397.0	409.6	423.5	455.8	465.5	441.8	482.2	529.5	561.0	584.2	632.4	709.8
Finland	146.2	163.9	178.1	187.4	197.0	218.0	223.1	231.0	282.4	308.2	316.9	321.5	344.8	380.1
Lithuania	30.5	34.3	37.6	39.7	41.9	46.7	47.0	48.3	57.8	62.4	65.8	68.5	74.7	87.0
Latvia	19.9	22.4	23.4	26.1	28.8	31.5	32.0	32.0	38.4	41.2	42.2	43.6	47.3	54.5
Estonia	21.4	25.0	28.2	30.2	31.6	34.9	36.3	37.4	45.1	48.6	49.7	50.6	54.5	61.3
Iceland	6.0	7.6	8.3	9.6	10.3	12.1	13.3	15.7	23.3	25.0	25.3	25.9	28.0	32.2
SE EUROPE	622	687	710	722	734	824	817	781	886	961	1,015	1,057	1,153	1,363
Turkey	313.1	334.1	334.6	335.0	334.5	368.8	366.2	337.3	381.3	408.2	431.7	452.6	496.2	602.2
Greece	70.3	88.2	92.7	93.8	100.1	120.0	120.4	120.4	141.2	156.9	164.0	169.5	183.1	205.6
Bulgaria	39.8	49.4	50.9	49.9	51.0	61.0	59.4	60.9	66.6	73.2	77.5	80.9	88.2	103.0
Croatia	49.7	53.0	56.0	56.8	57.9	64.7	62.3	61.7	70.6	77.9	82.7	86.4	94.0	109.3
Slovenia	54.1	58.3	62.3	65.5	66.1	72.0	73.6	70.5	81.1	87.0	90.6	92.7	100.4	115.1
Serbia	42.0	44.0	46.5	47.6	46.1	49.7	48.0	46.4	52.0	56.9	60.5	62.5	68.1	82.1
Cyprus	26.9	30.8	34.7	38.5	40.5	44.7	45.4	42.6	46.0	49.6	52.7	55.4	60.5	71.5
Bosnia & Herzegov.	8.6	9.7	11.1	11.2	11.9	13.5	13.8	14.0	16.2	17.7	18.7	19.3	20.9	24.5
Albania	6.7	7.7	8.1	9.4	10.6	11.5	10.4	9.5	11.3	12.3	13.1	13.8	15.1	18.1
Macedonia	4.3	4.8	5.1	5.3	5.7	6.6	6.5	6.2	7.2	7.6	8.1	8.4	9.2	10.9
Kosovo	4.2	4.5	4.6	5.1	5.9	6.6	6.9	6.9	7.8	8.6	9.2	9.6	10.5	12.8
Montenegro	2.5	2.8	2.9	3.4	3.6	4.5	4.3	4.4	4.9	5.4	5.7	5.9	6.4	7.6

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SPECIALIZED DESIGN SERVICES
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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
AFRICA & MID. EAST	2,541	2,844	3,173	3,260	3,412	3,602	3,549	3,423	3,782	3,815	4,002	4,209	4,586	5,562
MIDDLE EAST	1,489	1,687	1,896	1,950	2,004	2,085	2,053	2,038	2,298	2,289	2,385	2,499	2,697	3,194
Saudi Arabia	307.4	379.6	454.0	472.2	528.5	558.5	607.1	579.1	651.0	650.8	683.7	722.9	790.4	946.5
Iran	66.8	79.8	90.0	92.9	90.3	78.2	66.8	64.3	71.7	71.6	76.0	75.8	75.9	78.3
United Arab Emirates	304.1	339.2	372.1	379.2	371.1	374.9	369.5	343.7	401.8	401.8	427.7	457.8	500.5	615.2
Israel	440.3	476.8	539.9	578.1	581.4	617.6	587.2	618.1	696.9	689.8	713.6	743.1	815.5	981.7
Iraq	113.8	125.2	138.4	124.2	129.5	137.0	128.4	152.0	155.2	154.2	158.2	159.5	158.6	172.7
Qatar	69.5	79.9	83.2	79.9	71.7	73.5	72.4	70.8	80.4	79.9	83.8	87.1	85.1	89.2
Kuwait	72.8	80.3	81.5	85.4	90.6	98.5	91.7	91.2	103.0	102.4	103.3	108.2	114.3	127.3
Oman	27.5	30.9	33.0	33.1	34.6	37.4	41.3	36.7	47.9	48.4	50.3	52.2	57.2	69.6
Lebanon	34.7	37.5	37.0	36.7	36.8	34.9	30.5	29.7	32.9	32.9	31.2	32.9	35.8	41.0
Jordan	6.2	7.1	7.5	7.9	8.3	9.3	9.4	9.2	10.3	10.2	10.7	11.2	12.2	14.3
Bahrain	29.0	31.9	35.9	39.2	39.0	40.7	27.6	23.6	26.1	25.9	27.3	28.5	30.1	34.4
Yemen	4.6	5.3	5.9	5.9	6.0	6.2	5.9	5.6	6.5	6.6	6.6	6.7	7.1	8.5
Syria	8.6	10.1	12.6	11.3	12.0	13.3	11.3	10.6	10.9	10.7	10.1	10.7	11.7	13.3
Palestine	3.3	3.7	4.8	4.2	4.2	4.8	3.7	3.5	3.6	3.4	2.7	2.4	2.5	2.6
NORTH AFRICA	318	361	395	421	473	504	509	464	489	502	523	552	609	752
Egypt	156.3	176.2	194.9	212.2	239.4	252.6	251.2	229.1	240.4	244.6	256.4	270.9	299.1	378.4
Algeria	66.8	77.6	88.2	95.9	108.6	115.7	119.6	106.9	112.7	118.8	126.1	132.5	145.8	172.2
Morocco	48.4	55.9	61.7	64.2	73.0	77.3	78.5	73.0	76.9	77.8	82.6	87.7	97.5	121.2
Sudan	13.4	15.2	17.0	17.8	20.0	21.9	21.9	20.4	21.6	22.2	17.6	18.3	19.6	25.8
Tunisia	16.0	18.2	20.3	21.6	23.9	26.3	27.2	25.4	27.1	28.0	29.2	30.3	32.8	36.8
Libya	16.4	17.7	12.3	8.1	7.5	9.4	9.6	8.5	9.1	9.4	10.0	11.7	13.2	16.1
South Sudan	0.6	0.7	0.8	0.8	0.8	0.9	0.8	0.8	0.9	0.9	0.7	1.0	1.1	1.3
WESTERN AFRICA	418	443	507	507	525	569	548	509	551	571	615	656	730	946
Nigeria	214.7	242.5	254.5	251.7	249.8	261.2	243.4	219.8	237.3	239.7	255.4	268.8	296.6	365.3
Ghana	12.6	13.8	13.8	14.0	13.9	15.2	14.4	14.6	14.3	14.7	15.9	17.1	18.9	24.1
Ivory Coast	139.6	130.7	169.8	174.1	190.8	224.4	217.5	205.4	223.5	236.6	256.6	276.4	310.8	420.9
Senegal	15.3	13.5	19.0	19.2	20.2	19.5	21.7	21.7	23.9	24.6	26.7	29.1	31.6	37.7
Mali	5.0	5.6	8.2	7.6	8.0	9.1	10.5	10.1	11.2	11.8	12.7	13.5	15.1	19.5
Burkina Faso	1.7	1.6	2.4	2.1	2.3	2.5	2.7	2.8	3.0	3.2	3.5	3.7	4.1	5.2
Niger	3.5	3.9	4.2	4.3	4.4	4.8	5.0	4.8	5.3	5.5	6.3	6.8	7.6	10.2
Guinea	13.5	15.8	16.9	17.2	17.6	12.3	12.1	11.2	12.4	13.1	14.2	15.3	17.6	27.1
Benin	2.9	3.4	3.6	3.9	4.1	4.6	5.0	4.6	5.1	5.3	5.9	6.4	7.2	9.8
Mauritania	3.1	4.3	6.2	5.8	6.0	6.3	6.3	5.9	6.5	6.9	7.5	7.9	8.8	11.1
Togo	3.0	4.3	4.2	3.6	3.7	4.4	4.6	4.2	4.6	4.9	5.4	5.7	6.4	8.3
Sierra Leone	1.5	1.6	1.8	1.8	1.9	2.1	2.0	1.9	2.1	2.2	2.3	2.5	2.7	3.4
Liberia	0.4	0.5	0.5	0.5	0.5	0.6	0.5	0.3	0.3	0.4	0.4	0.4	0.5	0.6

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SPECIALIZED DESIGN SERVICES
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Specialized Design Services market size by country and region, 2014-2030, in $ millions, with 2026 and 2030 forecasts.

Market Size ($ M)	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026 fcst	2030 fcst
Cape Verde	0.6	0.6	0.7	0.6	0.6	0.6	0.7	0.6	0.7	0.7	0.8	0.9	1.0	1.2
Gambia, The	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Guinea-Bissau	0.8	0.8	0.9	0.9	0.9	0.9	0.9	0.8	0.9	1.0	1.1	1.1	1.3	1.6
CENTRAL AFRICA	91	104	110	113	136	150	151	136	142	147	157	165	180	219
Angola	35.3	40.6	43.4	44.8	53.2	58.9	59.4	53.6	56.1	58.3	62.7	65.4	71.0	83.1
Congo (DR)	20.4	23.3	24.2	24.7	30.2	33.7	33.6	29.8	31.0	32.2	34.9	37.3	41.9	54.5
Cameroon	15.2	17.0	18.3	19.3	21.3	23.0	23.0	20.9	22.0	22.4	23.8	24.8	27.2	33.5
Gabon	6.5	7.2	7.8	7.8	9.3	10.2	10.4	9.6	10.0	10.4	11.0	11.4	12.4	14.6
Congo	4.9	5.5	6.0	6.0	7.2	7.8	8.1	7.4	7.6	7.7	8.0	8.3	9.1	10.9
Equatorial Guinea	3.2	3.6	3.7	3.8	5.3	5.9	5.9	5.5	5.8	5.9	6.1	5.8	6.0	6.4
Chad	4.7	5.3	5.7	5.4	7.9	8.7	8.7	8.0	8.3	8.5	9.2	9.8	10.9	13.6
C. African Republic	1.0	1.1	1.1	1.1	1.1	1.3	1.2	1.1	1.2	1.2	1.3	1.3	1.5	1.8
Sao Tome & Principe	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.4
EASTERN AFRICA	93	106	114	117	124	136	132	124	137	141	152	163	183	241
Kenya	23.1	25.7	27.6	28.4	29.5	32.9	29.4	28.9	32.1	34.4	36.8	39.1	43.3	54.9
Ethiopia	15.2	18.4	21.7	22.5	23.3	25.8	26.8	24.7	26.6	26.8	29.6	32.7	37.8	54.5
Tanzania	4.2	5.2	6.3	7.1	7.7	8.7	9.4	9.1	10.2	10.6	11.4	12.3	13.7	18.4
Uganda	16.6	17.5	16.1	15.3	16.1	18.0	17.6	17.0	20.8	21.9	23.7	25.6	29.2	40.0
Zambia	3.2	3.5	3.8	4.0	4.1	4.2	4.6	4.2	5.2	5.3	5.6	5.9	6.5	8.2
Zimbabwe	4.8	5.3	5.9	6.1	6.1	6.4	5.9	5.1	5.4	4.8	5.0	5.4	6.0	7.4
Mozambique	1.5	1.7	1.9	2.0	1.8	2.1	2.7	2.8	2.3	2.3	2.5	2.5	2.6	3.3
Mauritius	9.9	11.2	12.2	12.8	13.3	14.5	12.6	12.0	13.3	13.7	14.8	15.4	16.9	20.3
Madagascar	6.0	6.5	6.9	7.0	8.5	7.7	7.1	5.5	5.2	5.3	5.7	5.9	6.5	8.1
Rwanda	2.9	3.6	3.9	4.2	4.6	5.2	5.2	5.4	5.8	5.9	6.5	7.0	8.0	11.0
Malawi	2.0	2.3	2.6	2.6	2.8	3.2	3.1	3.0	3.2	3.3	3.4	3.5	3.8	4.5
Eritrea	0.5	0.6	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.9	1.0
Burundi	0.7	0.9	1.1	1.1	1.2	1.4	1.5	1.3	1.4	1.4	1.5	1.6	1.8	2.2
Djibouti	0.8	0.9	1.1	1.1	1.3	1.6	1.5	1.3	1.4	1.4	1.6	1.7	1.9	2.4
Seychelles	0.5	0.6	0.7	0.7	0.8	1.1	1.0	0.8	0.8	0.9	0.9	1.0	1.0	1.2
Somalia	1.3	1.5	1.6	1.6	1.7	2.0	1.9	1.8	1.9	2.0	2.1	2.2	2.4	2.9
Comoros	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.7
SOUTHERN AFRICA	131	143	150	151	150	159	158	151	164	165	170	174	187	210
South Africa	123.1	133.6	140.8	141.5	140.5	148.6	147.7	141.2	152.9	153.8	158.3	162.0	173.8	193.8
Botswana	4.6	5.1	5.5	5.7	5.7	6.2	6.1	5.9	6.5	6.7	6.7	6.7	7.4	9.3
Namibia	1.3	1.6	1.5	1.5	1.5	1.4	1.3	1.2	1.3	1.4	1.5	1.5	1.7	1.9
Eswatini	1.9	2.3	2.1	2.4	2.1	2.3	2.5	2.7	3.1	3.2	3.3	3.5	3.9	4.6
Lesotho	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.3	0.3	0.3	0.3	0.4	0.4	0.4

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SPECIALIZED DESIGN SERVICES
TOP 25 COUNTRIES BY MARKET SIZE

Kentley Insights

The 25 largest Specialized Design Services markets by 2026 sales, with 2030 forecasts and growth rates. Together they make up 89% of global sales.

LARGEST COUNTRY MARKETS, 2026 AND 2030 FORECAST

1. United States: $48.1 billion in 2026, projected to reach $54.9 billion by 2030 (3.4% CAGR), 36.9% of global sales.
2. China: $16.2 billion in 2026, projected to reach $19.9 billion by 2030 (5.3% CAGR), 12.4% of global sales.
3. Japan: $6.3 billion in 2026, projected to reach $6.8 billion by 2030 (1.9% CAGR), 4.8% of global sales.
4. Germany: $5.6 billion in 2026, projected to reach $6.1 billion by 2030 (2.3% CAGR), 4.3% of global sales.
5. United Kingdom: $5.1 billion in 2026, projected to reach $5.7 billion by 2030 (2.5% CAGR), 3.9% of global sales.
6. France: $4.9 billion in 2026, projected to reach $5.4 billion by 2030 (2.4% CAGR), 3.8% of global sales.
7. India: $3.1 billion in 2026, projected to reach $4.2 billion by 2030 (7.8% CAGR), 2.4% of global sales.
8. Australia: $3.0 billion in 2026, projected to reach $3.4 billion by 2030 (3.4% CAGR), 2.3% of global sales.
9. Italy: $2.9 billion in 2026, projected to reach $3.1 billion by 2030 (1.9% CAGR), 2.2% of global sales.
10. Canada: $2.2 billion in 2026, projected to reach $2.4 billion by 2030 (2.9% CAGR), 1.6% of global sales.
11. Russia: $2.1 billion in 2026, projected to reach $2.3 billion by 2030 (2.4% CAGR), 1.6% of global sales.
12. Brazil: $1.8 billion in 2026, projected to reach $2.1 billion by 2030 (3.5% CAGR), 1.4% of global sales.
13. Netherlands: $1.8 billion in 2026, projected to reach $2.0 billion by 2030 (2.6% CAGR), 1.4% of global sales.
14. Spain: $1.8 billion in 2026, projected to reach $2.0 billion by 2030 (3.0% CAGR), 1.3% of global sales.
15. South Korea: $1.7 billion in 2026, projected to reach $2.0 billion by 2030 (3.3% CAGR), 1.3% of global sales.
16. Belgium: $1.3 billion in 2026, projected to reach $1.4 billion by 2030 (2.3% CAGR), 1.0% of global sales.
17. Switzerland: $1.2 billion in 2026, projected to reach $1.4 billion by 2030 (2.7% CAGR), 0.9% of global sales.
18. Sweden: $1.1 billion in 2026, projected to reach $1.2 billion by 2030 (3.1% CAGR), 0.8% of global sales.
19. Poland: $998.3 million in 2026, projected to reach $1.2 billion by 2030 (4.1% CAGR), 0.8% of global sales.
20. Taiwan: $899.2 million in 2026, projected to reach $1.1 billion by 2030 (4.5% CAGR), 0.7% of global sales.
21. Israel: $815.5 million in 2026, projected to reach $981.7 million by 2030 (4.7% CAGR), 0.6% of global sales.
22. Saudi Arabia: $790.4 million in 2026, projected to reach $946.5 million by 2030 (4.6% CAGR), 0.6% of global sales.
23. Mexico: $782.5 million in 2026, projected to reach $888.0 million by 2030 (3.2% CAGR), 0.6% of global sales.
24. Indonesia: $754.2 million in 2026, projected to reach $964.2 million by 2030 (6.3% CAGR), 0.6% of global sales.
25. Chile: $739.1 million in 2026, projected to reach $852.0 million by 2030 (3.6% CAGR), 0.6% of global sales.

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