

ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Construction & Infrastructure (Real Estate & Construction)

> ****Source:**** <https://www.mordorintelligence.com/industry-reports/asean-mechanical-electrical-and-plumbing-services-market>

> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
:---	:---
Base Market Size	USD 16.69 billion
Projected Forecast (2031)	USD 16.69 billion
Growth Rate (CAGR)	10.97 %
Largest Market Region	Competitive Landscape
Fastest-Growing Region	N/A

Market Visualizations & Infographics

![Major players in ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Market industry](images/chart_2.png)

![ASEAN Mechanical, Electrical, and Plumbing (MEP) Services Market (2026 - 2031)](images/chart_3.png)

![ASEAN Mechanical, Electrical, and Plumbing (MEP) Services Market : Market Share by Type](images/chart_4.png)

![ASEAN Mechanical, Electrical, and Plumbing (MEP) Services Market : Market Share by End-User Industry](images/chart_5.png)

![ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Market](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |

Forecast Data Period | 2026 - 2031 |

Base Year Market Size (2025) | USD 15.44 Billion |

Market Size (2026) | USD 16.69 Billion |

Market Size (2031) | USD 28.09 Billion |

Growth Rate (2026 - 2031) | 10.97 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

|

Market Overview

ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Market Analysis by Mordor IntelligenceThe ASEAN Mechanical, Electrical, And Plumbing Services Market size is expected to grow from USD 15.44 billion in 2025 to USD 16.69 billion in 2026 and is forecast to reach USD 28.09 billion by 2031 at 10.97% CAGR over 2026-2031. The ASEAN Mechanical, Electrical, and Plumbing (MEP) services market is being supported by concurrent infrastructure cycles across the six major ASEAN economies, along with digital infrastructure expansion, industrial estate development, and tighter green-building compliance requirements. Foreign direct investment into ASEAN reached USD 226 billion in 2024, up 8% year on year, and greenfield investment in supply-chain-intensive manufacturing increased to USD 41 billion, which is widening the addressable pipeline for cooling, power, ventilation, water, and building-system design work across the region[1]ASEAN Secretariat and United Nations Conference on Trade and Development, “ASEAN Investment Report 2025: Foreign Direct Investment and Supply Chain Development,” ASEAN Secretariat, asean.org. Semiconductor commitments from Infineon in Malaysia, TSMC in Singapore, and BYD in Indonesia are adding dense project scopes in cleanrooms, high-voltage electrical systems, and precision-cooling environments, which give the ASEAN MEP services market a deeper industrial base than a standard building-services cycle. Public transport expansion, utility modernization, and urban construction in markets such as Vietnam and Indonesia also create demand redundancy, helping the ASEAN MEP services market remain resilient even when one project class slows. Competition remains moderately fragmented across global consultancies, regional contractors, and local specialists, while the clearest operating risk is skilled labor scarcity, which is extending delivery timelines and putting pressure on execution quality in the ASEAN MEP services market.

Key Report Takeaways

- * By type, mechanical services held 48.34% of the ASEAN MEP market share in 2025, while integrated MEP services is forecast to expand at 8.1% CAGR through 2031.
- * By service type, design & engineering led with 36.34% of market value in 2025, while other services are projected to grow at 8.82% CAGR through 2031.
- * By end-user industry, the commercial sector accounted for 41.23% of the ASEAN MEP services market size in 2025, while Infrastructure is advancing at a 8.6% CAGR through 2031.
- * By geography, Indonesia accounted for 33.22% of regional value in 2025, while Vietnam is expected to record the highest CAGR of 8.19% through 2031.

Key Market Trends

ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Market Trends and InsightsDrivers Impact Analysis*

Drivers | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

- Data-Center Capacity Growth Across Malaysia, Indonesia, and Singapore | +2.8% | Malaysia, Indonesia, Singapore | Short term (≤ 2 years) |
- Urban Housing and Transport Infrastructure Expansion | +2.5% | ASEAN-wide, strongest in Indonesia and Vietnam | Medium term (2-4 years) |
- EV, Electronics, and Semiconductor Manufacturing Clusters | +1.8% | Malaysia, Thailand, Indonesia, Singapore | Long term (≥ 4 years) |
- Smart-City and Industrial-Park Development Pipeline | +1.2% | Malaysia, Thailand

, Vietnam | Medium term (2-4 years) |
Green-Building Codes and BIM E-Submission Mandates | +1.0% | Singapore, Malaysia
, ASEAN-wide | Medium term (2-4 years) |
Flood-Resilient Water, Drainage, and Cooling System Design | +0.8% | Indonesia,
Vietnam, Thailand, Philippines | Medium term (2-4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The ASEAN MEP services market is moderately fragmented, with global engineering consultancies competing alongside regional contractors and country-level specialists. AECOM, WSP Global, Arup, Mott MacDonald, Aurecon, Meinhardt Group, Surbana Jurong, Shinryo Corporation, Obayashi Corporation, Gamuda, and Sunway Construction all operate across different parts of the regional opportunity set. AECOM's appointment as owner's engineer for Phase 2 of Singapore's integrated waste management facility in May 2026 demonstrates how international firms continue to target technically complex public infrastructure projects with strong advisory, oversight, and commissioning content[3]AECOM, "AECOM Binnies and Ramboll Joint Venture Appointed for Phase 2 of Singapore's Integrated Waste Management Facility," AECOM, aecom.com. Mott MacDonald's role as lead engineering consultant on the 600 MWac Bulan cross-border solar and battery storage project between Indonesia and Singapore illustrates a similar ability to secure complex multi-system energy work that requires high-confidence engineering coordination. No single player appears to dominate the ASEAN MEP services market, as major awards are distributed across owner's engineer roles, design consultancies, bundled contractors, and specialist system integrators.

Regional firms are also moving beyond conventional subcontracting roles and using ASEAN delivery capabilities to pursue higher-value, longer-duration positions. Meinhardt Group and Surbana Jurong signed MoUs with Abu Dhabi's Projects and Infrastructure Centre in November 2025, which showed that ASEAN-rooted engineering firms are increasingly exporting modular MEP, smart-city, and infrastructure planning expertise beyond their home region. Obayashi Corporation's establishment of PT Obayashi Concession Indonesia and its acquisition of a stake in a central Jakarta toll-road operator in May 2026 point to a strategy that extends beyond pure construction into concession-linked infrastructure participation. These moves suggest that firms are trying to lock in recurring infrastructure exposure and deepen client relationships rather than compete only on one-off project awards.

Specialized execution remains a strong differentiator in the ASEAN MEP services market because high-value scopes increasingly sit in narrow technical categories. Shinryo Corporation's Singapore rail ventilation contract shows how firms with deep experience in environmental control systems can defend strong positions in critical transport packages. Aurecon's RICS Southeast Asia Project of the Year recognition for a modular data center in Johor shows that speed, prefabrication, and tight services coordination are becoming more important in winning complex digital-infrastructure work. WSP's 2025 to 2027 strategy, which includes USD 200 million for research, innovation, and digital partnerships, also signals that major global players will keep investing in capability depth that can be applied to ASEAN's higher-spec project pipeline.

ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Industry Leaders* Meinhardt Group

* Surbana Jurong

* WSP Global

* AECOM

* Jacobs

* *Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Component Component 3 Scope Of The Report Bottom

ASEAN Mechanical, Electrical, And Plumbing (MEP) Services Market Report ScopeThe ASEAN MEP Engineering Services Market is Segmented by Type (Mechanical, Electrical, Plumbing, Integrated MEP), Service Type (Design & Engineering, Installation & Commissioning, Maintenance & Repair, Other Services), and End-User Industry (Residential, Commercial, Infrastructure), and Geography (Indonesia, Malaysia, Thailand, Vietnam, Singapore, Rest of ASEAN). The Market Forecasts are Provided in Terms of Value (USD Billion).

By TypeMechanical Services |
Electrical Services |
Plumbing Services |
Integrated MEP Services |

Segmentation Accordion Item

By GeographyIndonesia |
Malaysia |
Thailand |
Vietnam |
Singapore |
Rest of ASEAN |
Mainland ASEAN |

Frequently Asked Questions

What is the 2026 value of the ASEAN Mechanical, Electrical, and Plumbing services space?

The ASEAN Mechanical, Electrical, and Plumbing (MEP) Services Market is estimated at USD 16.69 billion in 2026 and is projected to reach USD 28.09 billion by 2031, growing at a CAGR of 10.97%.

Which type segment leads revenue across ASEAN MEP services?

Mechanical Services led the regional mix with a 48.34% share in 2025 because cooling, ventilation, and environmental control remain central across commercial, industrial, and transport assets.

Why is commercial demand still the largest source of work in ASEAN?

Commercial captured 41.23% in 2025 because office, retail, hospitality, mixed-use, and data-center assets remain concentrated in the region's main urban hubs.

Which geography is expanding fastest through 2031?

Vietnam is the fastest-growing geography with an 8.19% CAGR, supported by strong construction growth and a large 2026 to 2030 public investment plan.