

Urban Design Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** PropTech, Smart Buildings & Urban Development (Real Estate & Construction)
> **Source:** https://www.mordorintelligence.com/industry-reports/urban-design-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 79.01 billion
Projected Forecast (2031)	USD 79.01 billion
Growth Rate (CAGR)	7.80 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Urban Design industry] (images/chart_2.png)

! [Urban Design Market Size] (images/chart_3.png)

! [Urban Design Market Share by Type, 2025] (images/chart_4.png)

! [Urban Design Market Share by Investor Type, 2025] (images/chart_5.png)

! [Urban Design Market Growth Rate by Region] (images/chart_6.png)

! [Urban Design Market Concentration] (images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Market Size (2026) | USD 79.01 Billion |
Market Size (2031) | USD 114.80 Billion |
Growth Rate (2026 - 2031) | 7.80 % |
Fastest Growing Market | Middle East and Africa |
Largest Market | Asia-Pacific |
Market Concentration | Medium |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Urban Design Market Analysis by Mordor IntelligenceThe Urban Design Market size is expected to grow from USD 74.5 billion in 2025 to USD 79.01 billion in 2026 and is forecast to reach USD 114.80 billion by 2031 at 7.80% CAGR over 2026-2031. The urban design market is supported by the need to plan growing cities, renew older districts, and link development with transport and public services. The United Nations reported that cities housed 45% of the global population of 8.2 billion in 2025, and most population growth through 2050 is expected in urban areas [1] United Nations Department of Economic and Social Affairs, "World Urbanization Prospects: The 2025 Revision," United Nations, un.org. This increases demand for master planning, land-use advice, and public realm design in mature and emerging economies. Work is shifting from new city construction to the regeneration of existing neighborhoods, which requires coordination across planning, mobility, public space, climate adaptation, and community needs. Firms with broad technical teams, strong local partnerships, and practical regulatory knowledge are positioned to compete for these assignments.

Key Report Takeaways

- * By type, master planning and land-use planning held 31.6% of the urban design market share in 2025, while zoning, development control, and implementation advisory is forecast to grow at an 8.4% CAGR through 2031.
- * By sector, mixed-use and township developments held 38.2% of the urban design market size in 2025, while Transportation and Infrastructure is forecast to grow at an 8.1% CAGR through 2031.
- * By investor type, public clients accounted for 61.5% of revenue in 2025, while private investor clients are forecast to grow at a 7.8% CAGR through 2031.
- * By geography, Asia-Pacific held 37.8% of revenue in 2025, while the Middle East and Africa is forecast to grow at an 8.9% CAGR through 2031.

Key Market Trends

Global Urban Design Market Trends and InsightsDrivers Impact Analysis*

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

Urban Population Growth | +2.1% | Global, with peak intensity in South and Southeast Asia and Sub-Saharan Africa | Long term (≥ 4 years) |
Secondary City Development | +2.0% | Asia-Pacific, especially ASEAN, Indonesia, Vietnam, and other emerging urban centers | Long term (≥ 4 years) |
Urban Regeneration and Redevelopment | +1.9% | China, Europe, North America, and India | Medium term (2-4 years) |
Infrastructure and Transit Investment | +1.7% | Asia-Pacific, Middle East and Africa, and North America | Medium term (2-4 years) |
Climate-Resilient Urban Development | +1.3% | Global, with policy concentration in OECD economies, Brazil, and India | Long term (≥ 4 years) |
Demand for Mixed-Use and Walkable Communities | +1.2% | North America, Europe, Gulf Cooperation Council countries, and East Asia | Short term (≤ 2 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The urban design market has large integrated consultancies and specialist design

practices with different competitive strengths. AECOM, Jacobs Solutions, WSP Global, Arcadis, and AtkinsRéalis compete through multidisciplinary services, geographic coverage, and delivery capacity. Their teams can combine planning, transport, water, engineering, architecture, and program management. AECOM reported a record backlog of USD 26.2 billion in its second-quarter fiscal 2026 results, along with a record design pipeline and strong client funding in transportation, water, and urban end markets. Arcadis reported net revenue of approximately USD 4.1 billion in 2025, free cash flow of approximately USD 311 million, and a backlog of approximately USD 3.9 billion. These indicators show why scale, financial capacity, and long client relationships remain important in major programs.

Specialist firms, including Gensler, HOK, Perkins&Will, Sasaki Associates, Gehl People, and Surbana Jurong, compete through local context, placemaking, design quality, and sector knowledge. These firms can be selected for prominent projects where cultural fit and public experience carry significant weight. Formal local partnerships can help international practices access early planning work in South and Southeast Asia. This approach can be more effective than relying only on a branch office because local studios often have established public-sector relationships. Implementation advice for large programs is a further area of competition because it combines phasing, community engagement, standards, and adaptive management. Compliance with frameworks such as ISO 37120 can influence tender assessments when clients require evidence of sustainable city outcomes.

Consolidation is also shaping the urban design market. WSP Global made a second unsolicited bid for Arcadis in July 2026, and Arcadis rejected the offer. The supplied material reported a bid value of USD 4.8 billion, and stated that Arcadis considered it to undervalue the company. AECOM and Jacobs Solutions were jointly appointed in November 2025 to provide design services for The Mukaab in Riyadh's New Murabba development. Their remit includes infrastructure, road tunnels, podiums, and public realm areas. These moves show that firms are seeking scale and major-program positions, while specialists continue to compete where local knowledge and design distinction matter.

Urban Design Industry Leaders* AECOM

* Jacobs Solutions Inc.

* WSP Global Inc.

* Arcadis N.V.

* Stantec Inc.

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Urban Design Market Report ScopeBy TypeMaster Planning and Land-Use Planning |
Urban Design, Public Realm and Landscape Design |
Transportation and Mobility Planning |
Zoning, Development Control and Implementation Advisory |
Others |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
South America | Brazil |
| Argentina |

- | Chile |
- | Peru |
- | Rest of South America |
- Europe |
- | Germany |
- | United Kingdom |
- | France |
- | Italy |
- | Spain |
- | Rest of Europe |
- Asia - Pacific |
- | China |
- | India |
- | Japan |
- | South Korea |
- | Australia |
- | Rest of Asia - Pacific |
- Middle East and Africa |
- | United Arab Emirates |
- | Saudi Arabia |
- | South Africa |
- | Egypt |
- | Rest of Middle East and Africa |

Frequently Asked Questions

What is the projected growth rate for urban design services through 2031?

The sector is projected to grow at a 7.8% CAGR from 2026 to 2031, rising from USD 79.01 billion in 2026 to USD 114.8 billion by 2031.

Which urban design service type is growing the fastest?

Zoning, Development Control and Implementation Advisory is forecast to grow at an 8.4% CAGR through 2031.

Which project sector creates the largest demand for urban design services?

Mixed-Use and Township Developments held 38.2% of revenue in 2025, the largest sector share.

Why are regeneration projects important for design consultancies?

Existing districts require coordinated work on land use, public space, infrastructure, local engagement, and phased delivery.