

## **Germany Used Construction Equipment Market - Strategic Assessment & Forecast 2022-2028**

Market Report | 2022-09-27 | 119 pages | Arizton Advisory & Intelligence

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### **Report description:**

Germany used construction equipment market is expected to grow at a CAGR of 2.68% during 2022-2028.

### **MARKET INSIGHTS**

Rising investment in public infrastructure renovation and housing projects is expected to support the demand for used equipment in the German market during 2022-2028. The expected number of used construction equipment units sold by 2028 in the market is 28,664.

Germany's economy contracted by 5% in 2020, and the country's major sectors, such as construction and manufacturing, were adversely impacted due to the unavailability of labor & raw materials. In 2021, Germany's economy displayed a slight recovery due to a surge in government investment in upgrading the country's infrastructure. The German government planned to invest USD 12.9 billion in rail infrastructure. Several expansion and refurbishment projects are in progress across the country. For instance, USD 5.7 billion funds are allocated for the expansion and upgradation of Frankfurt International Airport.

The country's construction industry is expected to thrive in 2022 due to ongoing construction and renovation projects. However, the manufacturing industry's growth is expected to be hampered due to reduced raw material supply and declining industrial production output. The production output of the manufacturing industry fell by 3.9% in Q1 2022, the most significant decline since April 2020.

### **KEY HIGHLIGHTS**

a) The Earthmoving segment has the largest share in Germany used construction equipment. Excavators held the largest market share in the earthmoving segment in 2021.

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b) Infrastructure upgradation projects such as the renovation of the commercial building, railway stations, and airports, repair of runways, and extension of roadways & bridges across the country will drive the high demand for Germany's used construction equipment market.

c) Rising prices of used equipment in Germany constitute a significant challenge. There is a surge in construction equipment demand due to increased investment in infrastructure projects across the country. However, the supply of material needed for the production of new equipment is lagging, resulting in long delivery times for new equipment making the used construction equipment more appealing to buyers across Europe, which pushes up the prices of used construction equipment in the European market.

d) Renting and leasing companies have a strong presence in Germany which can hamper the demand for used construction machinery. Zeppelin GmbH and HKL Baumaschinen GmbH hold the largest market share in construction equipment rental & leasing in Germany. The renting companies in Germany provide a wide range of construction equipment. They are providing trained operators for operating rented equipment. Other construction equipment rental companies are also providing logistics & insurance facilities to attract customers.

## SEGMENT ANALYSIS

### Segmentation by Type

#### - Earthmoving Equipment:

- o Excavator

- o Backhoe Loaders

- o Motor Graders

- o Other Earthmoving Equipment (Other loaders, Bulldozers, Trenchers)

#### - Material Handling Equipment

- o Crane

- o Forklift & Telescopic Handlers

- o Aerial Platforms (Articulated Boom Lifts, Telescopic Boom lifts, Scissor lifts)

#### - Road Construction Equipment

- o Road Rollers

- o Asphalt Pavers

#### - End Users

- o Construction

- o Manufacturing

- o Mining

- o Others

## MARKET TRENDS & DRIVERS

### Surge In Renovation & Repair Projects for Public Infrastructure

- The German government introduced a repair & rehabilitation program for developing roads across the country in 2022. The program focuses on existing roads, bridges, and cycle paths. The government allocated USD 429.2 million for road network maintenance in Baden Wurttemberg state in 2022. Additionally, USD 265.4 million is earmarked for the renovation of federal highways. The 2022 rehabilitation program includes 50 bridge maintenance projects, 250 km of highways, and 190 kilometers of state roadways repair and maintenance. In addition, several road repair works are being planned for states such as Saarland, Hesse, and Rhineland- Palatinate in 2022 for a budget of USD \$408.3 million.

- The demand for used construction equipment such as road rollers, excavators, wheel loaders, asphalt pavers, & backhoe loaders is expected to grow in Germany used construction equipment market. Due to its uses in road repair and infrastructure renovation

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projects. Used Construction equipment is ideal for redevelopment, repair & small budget projects due to its lower cost than new equipment. A surge in rehabilitation and renovation projects is expected to support the demand for used construction equipment instantly compared to new equipment whose supply chain is still in recovery.

#### Rising Investment for Upgrading Railways & Housing Sectors

-□ In 2021, the German government initiated several measures to develop the housing market. It allocated USD 5.9 billion under its housing policies towards constructing 100,000 rental units in the next four years. The government has also allocated USD 9.4 billion as a housing subsidy to be used over the 2018-2024 period.

-□ In 2021, 293,000 units of houses were built across the country. The government aims to increase the construction of houses in 2022 to overcome the housing crisis. 18% of housing projects were directed to renovating and repairing the existing buildings. In addition, the German government is also increasing the investment in the modernization and renewal of Germany's rail infrastructure in 2022. The government allocated USD 13.9 billion in 2022 compared to USD 920.3 million in 2021 for modernizing projects in the railway sector.

#### Political Distress & War Between Russia & Ukraine Drive the Demand for Used Construction Equipment

-□ According to VDMA, German construction machinery production is expected to grow by only 1% in 2022, and the supply chain of construction machinery is adversely impacted by an ongoing war between Russia and Ukraine. The association cautions about the delay in supplying new equipment in the market due to a major shortage of raw materials (iron, nickel, & steel) imported from Russia, Ukraine, and Belarus. Low production of new construction equipment will increase the demand in Germany used construction equipment market due to sizeable ongoing infrastructure upgradation projects across the region.

#### Auction Companies Are Upgrading Online Channels for Attracting Customers

-□ The companies such as Ritchie Bros & Equippo are upgrading their online full-service marketplace for used construction equipment in Europe. Purchase and sales of used construction machinery have faced obstacles such as a lack of transparency regarding quality and the complexity of logistics procedures in the European market. Therefore, the companies such as Equippo have upgraded their online services for buying and selling used construction equipment. The company provides various previously unavailable facilities in conventional transactions, such as inspection results by independent inspectors, money-back guarantee, and logistics agency services.

#### MARKET RESTRAINTS

##### Sharp Rise in Used Equipment Prices & New Emission Norms Are Expected Hamper the Demand for Used Equipment in German Market

-□ There is a constant increase in used construction equipment prices in Germany. According to Ritchie Bros, there was a 23% rise in prices of large earthmoving equipment such as excavators, dozers, & motor graders. A similar price surge was witnessed in aerial equipment such as cranes, forklifts & aerial platforms & medium earthmoving equipment such as backhoe loaders, mini excavators & trenchers. Cost efficiency is one of the major qualities of used equipment, making it a perfect choice for small repair & redevelopment projects. But the constant rise of prices can be a main restrictive factor for the growth of Germany used construction equipment market.

-□ The government has proposed strict emission standards for non-road mobile machinery such as construction equipment, railroad engine, and off-road vehicles. The stage V emission standards would replace a multi-layered legal framework in Europe. Stage V emission standard focuses on reducing the emission of nitrogen dioxide & particulate matter. The country also has Blue Angle norms for construction machinery. This norm is comparatively more stringent than the previous norms for noise emission and low emission levels. These emission norms in the country are expected to hamper the demand for diesel-based large used construction equipment.

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The Growing Renting & Leasing Market is expected to confine the Demand for Used Construction Equipment.

-□Equipment Rental Association estimated the value of equipment leasing in Europe was USD 25.6 billion in 2021. Germany is one of the largest markets for equipment leasing in Europe. According to Equipment Rental Association (ERA), the German rental and leasing market of construction machinery grew by 4.2% in 2021. Leasing has established itself even more firmly in the construction industry. In Germany, agriculture, mining, and public utilities ? contributed ~ 4% to the total value of the leasing market. Various renting companies in Germany provide a wide range of construction equipment. Renting is often preferred when contractors need specialized equipment that they do not have in their fleet. Contractors prefer to rent equipment that is costly and required for a specific operation, such as hydraulic excavators, skid steer loaders & dumpers. The growing renting and leasing market in Germany is expected to hamper Germany used construction equipment market.

## COMPETITIVE LANDSCAPE

-□Caterpillar is the market leader in Germany used construction equipment market. The company excels in selling the used earthmoving type of equipment in 2021. The company's crawler excavators & wheel loaders were popular in Germany's used construction equipment market segment in 2021.

-□Volvo Construction equipment was the second largest player in Germany used construction equipment market in 2021. The company's wheel loader was sold maximum in 2021. Excavators & mini excavators were among the prominently used equipment sold by the company in 2021.

-□Komatsu promotes used equipment by extending the warranty program Komatsu Advantage Extended Coverage Plan for used equipment, reducing maintenance charges. Komatsu's key belief is that partnerships are the best way to solve challenges and meet society's needs. The company partners with 20 start-up companies across Japan, the United States, & Europe to launch ?SMART CONSTRUCTION? solutions.

### Key Vendors

- Caterpillar
- Komatsu
- Volvo Construction Equipment
- Hitachi Construction Machinery
- Liebherr
- Hyundai Construction Equipment
- XCMG
- SANY
- CB

### Other Prominent Vendors

- Terex Corporation
- Takeuchi Manufacturing
- LG
- Liu Gong

### Auctioneers Profile

- Ritchie Bros.
- Proxibid
- Equippo
- Sandhills Global

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- Surplex
- Apex auctions
- Angermann machinery & equipment GmbH & co.

#### Distributor Profiles

- De Bau Machines
- BAUMA
- BS Baumaschinen Service GmbH

#### KEY QUESTIONS ANSWERED

- 1.□What is the expected size of Germany's used construction equipment market by 2028?
- 2.□What is the expected number of units sold in Germany's used construction equipment market by 2028?
- 3.□What is the growth rate of Germany's used construction equipment market?
- 4.□Who are the key players in Germany's used construction equipment market?
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###### 3.1.3. Road Construction Equipment

- Road Roller
- Asphalt Paver

###### 3.2 Germany Used Construction Equipment Market by Application (Volume & Value)

- Construction
- Mining
- Manufacturing

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-□Others (Power Generation, Utilities Municipal Corporations, Oil & Gas, Cargo Handling, Power Generation Plants, Waste Management, etc)

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