

## **Germany Elevator and Escalator - Market Size and Growth Forecast 2023-2029**

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### **Report description:**

The Germany elevator and escalator market is expected to grow at a CAGR of 11.22% during 2023-2029.

### **MARKET OUTLOOK**

The increasing demand for high-rise structures and the government's focus on infrastructure in key economic cities have propelled the elevator business in Germany to new heights.

The Germany elevator market by the installed base is expected to reach 96.3 thousand units by 2029. The elevators market in Germany in the year 2022 witnessed a more substantial growth than expected, representing medium year-on-year demand of 2.7% for the term 2023-2025 due to high raw material costs, neutral manufacturing activity, as fresh COVID-19 cases weighing on the recovery momentum. Future elevator industry growth is anticipated to be driven by investments in public sector infrastructure, digitalization, energy-efficient housing renovations, and a green circular economy, all of which are supported by EU financing.

### **KEY HIGHLIGHTS**

a) In September 2020, the Federal Minister of the Interior, Building, and Community announced that the second round of the national funding program "Smart City Model Projects" will support 32 Smart City Model Projects with roughly 350 million Euros. In 2021, out of 94 cities, districts, and municipalities participating in the nation's "Smart Cities Model Projects" for funding, only 28 were selected officially.

b) Germany has allotted EUR 2.5 billion as part of its 2021-2026 National Recovery and Resilience Plan (NRRP) for investments in the repair of energy-efficient buildings. The country is anticipated to achieve at least a 30% energy reduction through this extensive remodeling effort.

c) The government introduced the "Energy Efficiency Strategy 2050" initiative in December 2019, intending to meet its 2030 targets by encouraging energy efficiency investments across several sectors. The Energy Conservation Law in Germany specifies

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the regulations for energy conservation. The Energy Conservation Act (EnEG), the Energy Conservation Ordinance (EnEV), which were substituted by the GEG in November 2020, and the Renewable Energies Heat Act (EEWarneG) include the most significant regulations governing energy efficiency in buildings.

d) Under the Basic Law, the German government has earmarked USD 1 billion in program funds to be utilized between 2020 and 2024 to give financial support regarding social housing. The German government has initiated several measures to develop the country's housing market. It has allocated EUR 5.0 billion (USD 5.9 billion) under its housing policies to construct 100,000 rental units in the next four years.

e) Otis Germany signed an agreement with the Max Bogl Group to develop a new business model allowing clients to get elevator modules in high-quality serial manufacturing from a single source, bringing the "Living Modular" idea to life. Otis will provide elevator components with cutting-edge technology, which Otis will build at the Max Bogl factory.

## SEGMENTATION INSIGHTS

### Elevator Market Segmentation by

#### Machine Type

- Hydraulic and Pneumatic
- Machine Room Traction
- Machine Room Less Traction
- Others
  - o Climbing
  - o Elevators
  - o Industrial Elevators

#### Carriage Type

- Passenger
- Freight

#### Capacity

- 2-15 Persons
- 16-24 Persons
- 25-33 Persons
- 34 Persons and Above

#### End-User

- Commercial
- Residential
- Industrial
- Others
  - o Public Transit
  - o Institutional
  - o Infrastructural

### Escalator Market Segmentation by

#### Product Type

- Parallel

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- Multi Parallel
- Walkway
- Crisscross

#### End-User

- Public Transit
- Commercial
- Others
- o□Institutional Sector
- o□Infrastructure
- o□Industrial

### The Growth Rate Of Digitalization And Increasing Developments In Buildings To Drive The Germany Elevator And Escalator Market

- 1.□By developing a roadmap for digital design and construction, Building Information Modelling is regarded as the standard tool for planning and designing a building for all federal infrastructure projects, according to the Federal Ministry of Transport and Digital Infrastructure(BMVI). In Germany, companies are using BIM as part of their projects for more than USD 25 million value. Increasing usage of BIM will create more opportunities for international companies which can provide BIM software to local companies.
- 2.□Germany's residential program aims to complete the extensive renovation of 40,000 homes by 2026, as stated in its 2021-2026 National Recovery and Resilience Plan (NRRP). Municipal living laboratories for the energy transition will be used with this measure to perform pilot programs that explore new ideas for an effective and sustainable energy supply in urban areas.
- 3.□The climb lift system was Schindler's new upgrade of access equipment used for high-rise projects in Germany (Elbtower in Hamburg) and the Middle east. The Schindler Climb Lift's interior design will enable building work to be completed more efficiently, especially regarding the exterior. According to Schindler, these elements can help to cut the cost of constructing high-rise buildings by approximately 5%.
- 4.□The Important Project of Common European Interest (IPCEI) on Microelectronics and Communication Technologies(USD 1.5 billion) and the IPCEI on Next Generation Cloud Infrastructure and Services (IPCEI-CIS) USD 767.6 million) Two significant multi-country digitalization projects are also a part of the NRRP.

### Governments Effort To Expand Infrastructure Across Nation To Increase Demand For New Installations

- 1.□With civil engineering, as a part of the overall funding of USD 276 billion under the 2030 Federal Transport System Plan, the German government has already declared a USD 88 billion investment plan in the country's rail infrastructure.
- 2.□As part of the initiative for the future of rail in Northern Germany, the northern states of Germany agreed to major new-build and infrastructure upgrades for their rail systems in January 2022. To modernize their rail networks up to 2030, Bremen, Hamburg, Mecklenburg-Western Pomerania, Lower Saxony, and Schleswig-Holstein will invest a record USD 30 billion.
- 3.□A total of USD 145.4 billion has been allocated for capital maintenance and investment in replacement infrastructure across all three modes of transportation from 2016 to 2030. The FTIP 2030 also seeks to establish the groundwork for a transportation system that is environmentally sustainable by investing in transportation infrastructure.

### Regulations For Maintenance Of Elevators And Escalators In Germany By The TUV Association To Create Demand

- 1.□The maintenance and modernization in the Germany elevator and escalator market accounted for 67.9% and 32.1%, respectively, for the year 2022.
- 2.□In 2018, there were approximately 100,000 elevators that had not been tested. Annual inspections of elevators are required in Germany, and following each TUV inspection, a sticker identifying the following inspection date must be placed inside the elevator. The elevator has not been inspected if that date has passed. In 2017, 1,965 elevators were closed, with the TUV

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Association reporting that the total figure for Germany was 3,500.

## REGIONAL ANALYSIS

-□ In the first two quarters of 2022, the Big 5 regions (Berlin, Dusseldorf, Frankfurt, Hamburg, and Munich) occupied over 1.51 million square meters of space, a startling 35% rise over the same period in 2021. This development is not solely attributable to the construction of the new Tesla factory in Grunheide, which added 327,000 square meters to the first-quarter total after receiving planning authorization.

-□ The Bavarian Ministry of Housing, Construction, and Transport decided to invest USD 447.6 million in the German state's rail system in July 2020. The money will be used to build new stations in Brunnen, Regensburg, and LindaWurzburg, as well as to increase accessibility along the Senden-Marktobderdorf route, among other minor regional rail projects. Such factors play a crucial role in the Germany elevator and escalator market growth.

## VENDOR LANDSCAPE

-□ The top four prominent vendors, including Otis, KONE, Schindler, and TK Elevator, account for 49% of the Germany elevator and escalator market share.

-□ Schindler adopted the Top Speed 23 program to accelerate digitization, boost product innovation, strengthen its position in key markets, and address profitability gaps.

-□ KOHLER Elevator GmbH provides complete elevator packages for use with or without machine room traction. The company's SYMPHONY lift generation can be individually configured according to the application's requirements for New installations for office buildings, residential, hotels and shopping centers, airports, and hospitals.

-□ In February 2022, meta100 and meta200 by TKE offer the desired solution for medium-height buildings. Meta200 has an "Automatic Rescue Device" that will take passengers to the nearest floor they can exit the elevator in case of being stuck in the elevator, a camera system in terms of in-cab security monitoring, and a soft and sensitive device.

### Key Vendors

- KONE
- Mitsubishi Electric
- TK Elevator
- Otis
- Fujitec
- Schindler
- KOHLER Elevator GmbH
- Schmitt+ Sohn Aufzuge

### Other Prominent Vendors

- LIFT-OK.COM
- SJEC
- AKE ELEVATOR
- KLEEMANN Aufzuge GmbH
- Stannah Lifts Holdings Ltd.

## KEY QUESTIONS ANSWERED

- 1.□ How big is the Germany elevator and escalator market?
- 2.□ What is the number of installed bases in the Germany elevators and escalators market in 2022?

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3. Who are the key companies in the Germany elevator and escalator market?
4. What will be the growth rate of the Germany elevator and escalator market?
5. What are some key market opportunities in the Germany elevator and escalator market?

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