

Netherlands Used Construction Equipment Market - Strategic Assessment & Forecast 2023-2029

Market Report | 2023-01-10 | 119 pages | Arizton Advisory & Intelligence

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Report description:

The Netherlands used construction equipment market is expected to grow at a CAGR of 2.99% during 2023-2029.

MARKET OUTLOOK

-□ The growing investment in public infrastructure projects, including the extension of railways tracks and airports & renovation of bridges & highways, is expected to drive market growth.

-□ The Netherlands used construction equipment market is expected to reach 22,896 units by 2029, growing at a CAGR of 2.70%. In 2021, the government injected USD 3.6 billion to boost economic recovery post-pandemic. The investment is directed toward developing public infrastructure, which includes the upgradation of railways and airports. Investment is also planned for energy transition projects to reduce carbon emissions by 2030. Various wind farm and solar projects are under progress in Flevoland & Groningen provinces in 2022.

-□ The government also plans to build 10 GW of the national network for green hydrogen with an investment of ~USD 1.6 billion in 2022. The Netherlands manufacturing sector witnessed more than 2% growth in Q1 2022 due to the growing demand for goods in the European market. However, the growing inflation and disruption of raw materials & labor are expected to hamper the growth of the manufacturing sector in the Netherlands in the latter part of 2022. Due to ongoing construction and renovation projects, the Netherlands used construction equipment market is expected to grow robustly in 2022. However, the manufacturing industry's growth is expected to be hampered due to a reduced raw material supply and declining industrial production output. The production output of the manufacturing industry declined by 3.9% in Q1 2022, the most significant decline since April 2020.

KEY HIGHLIGHTS

a)□ The Earthmoving segment has the largest share in the Netherlands used construction equipment market. Excavators held the largest market share in the earthmoving segment in 2022.

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- b) Infrastructure upgradation projects such as the renovation of commercial buildings, railway stations, airports, and the extension of roadways & bridges across the country will drive the Netherlands used construction equipment market.
- c) European Commission provides the Netherlands' USD 4.8 billion recoveries and resilience plan. Netherlands' recovery and resilience aim for strong economic recovery. The reforms and investments in the plan will help the country become more sustainable, resilient, and better prepared for the challenges and opportunities of green and digital transitions.
- d) The demand for forklifts in the Netherlands used construction equipment market is higher due to their extensive use in the logistics industry. The rise in E-commerce & logistics industry in the Netherlands is expected to support the demand for used forklifts.
- e) The demand for new-generation used excavators with ICT and remote monitoring technology is also gaining market share in the Netherlands. Skilled labor shortage & rising accident cases at construction sites prompt the use of automated used construction equipment in the Netherlands.
- f) The country's residential sector grew in 2021 after a contraction in 2020. The housing sector is expected to be impacted by strict government rules for the emission of nitrogen & carbon in the country. Rising building material prices is another major factor impacting the Netherlands construction industry in 2022. Rising inflation and disruption of raw materials & labor are expected to hamper the growth of the manufacturing sector in the Netherlands in Q4 2022, further impacting the Netherlands used construction equipment market growth.

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

Renovation Of Old Infrastructure In The Netherlands Supports The Sales Of Used Construction Equipment

- The government increased its focus on renovating old infrastructure across the country in 2022. The government planned to invest ~USD 4.1 billion to maintain infrastructure across the country in 2023. The railway sector is one of the largest beneficiaries of government investment; nearly USD 2 million in funds are planned to be allocated in 2023. Investment is also planned for developing roadways (USD 1.1 billion) and waterways (USD 625.3 million) in 2023.
- For the development of roadways across the country, USD 729.5 million is planned to spend on the repair and maintenance of existing roads and national highways. A USD 521.3 million is also allocated for constructing new roadways to enhance connectivity across the country in 2023. In 2020, the Netherlands' government introduced the National Growth Fund of USD 20.8 billion for

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2021-2025. A USD 2.6 billion fund is further allocated for extending Amsterdam's North-South metro & track between Delft and Schiedam regions. The rise in government investment in the renovation of old infrastructure & railways is expected to support the Netherlands used construction equipment market during the forecast period.

Netherlands Government investment in National Growth Fund

- In 2022, Netherlands' government planned to invest USD 5.1 billion, with an extra USD 1.3 billion in reserve for 28 projects to achieve sustainable growth in the country. The fund, allocated under National Growth Fund, will be used to invest in digitalization in higher education & secondary vocational education, the green hydrogen project, and healthcare system improvement.
- An additional USD 20.6 billion investment is directed toward knowledge development, infrastructure, research, and development. Government increased investment in the healthcare sector by 22% in 2021. In 2022, the government planned to invest USD 69.3 million to improve healthcare centers across the country. Government investment growth is expected under National Growth Fund in 2023, supporting the Netherlands used construction equipment market sales.

The Surge In Demand For Smaller Sized Electric Based Used Construction Equipment

- There is a surge in demand for mobile electric used construction equipment such as cranes, excavators, forklifts & loaders in the Netherlands used construction equipment market in 2022. Strict emission standards across European Union countries trigger the demand for electric construction equipment over fuel-based. Smaller-sized mobile electric used construction equipment such as mini excavators, forklifts & loaders are gaining a strong market share in the Netherlands market due to low maintenance cost compared to larger construction equipment. There is a rise in infrastructure investment across the country. And the government also focused on reducing carbon and nitrogen emissions across the country in 2022.

INDUSTRY RESTRAINTS

Government's Rules To Control Nitrogen Emission Is Expected To Hamper The Netherlands Used Construction Equipment Market Sales

- The Netherlands is struggling to control the emission of nitrogen from the agriculture, transport & construction industries. The country is the second largest emitter of nitrogen in European countries which can adversely impact climate and biodiversity. The government is taking strong steps to control nitrogen emissions, which is expected to hamper the construction of new houses across the country. The construction of new houses requires construction equipment & dump trucks which are significant emitters of nitrogen in the construction industry. According to government data, the government planned to build 75,000 new houses each year from 2021, but the nitrogen crisis hampered construction activity resulting in a decrease in 40% of new house construction each year.

Rising accidents Cases at Construction Sites Restrict the Demand for Used Construction Equipment.

- There will be a sharp rise in the number of accident cases in the construction and transport/ storage sectors in 2022. According to a report by social affairs ministry inspectors Netherlands, a total of 69 people died in an industrial accident in the country in 2020. The number of work-related accidents reported rose by over 100 reaching a total of 4,474 cases by the end of 2020. According to the government report, using mobile work equipment such as cranes & forklifts is most responsible for casualties at construction sites. Such factors are hampering the growth of the used construction equipment market. Further, high accident cases of workers are witnessed in construction, waste management, agriculture, & storage industries across the Netherlands.

VENDOR LANDSCAPE

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- Market leaders are Hitachi Construction Equipment, Kubota, Caterpillar, Volvo Construction Equipment, & Komatsu. They have a strong industry share, and these vendors offer diverse products in the Netherlands market.
- Hyundai Construction Equipment launched two European Union Stage V Compliant A-Series crawler excavators, the HX160A L and the HX180A L, in 2022 for the European market.
- Yanmar, Takeuchi & CNH industries are niche players in the Netherlands used construction equipment market. They offer limited products, mainly catering to customers requiring earthmoving equipment.

Key Vendors

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

Other Prominent Vendors

- CNH Industrial
- Manitou
- LiuGong
- Yanmar
- Takeuchi Manufacturing

Auctioneers Profile

- Ritchie Bros. Auctioneers
- Equippo
- Surplex
- Euro Auctions
- Epic-Auctions

Distributors Profiles

- Holland Machinery
- Wilco Machinery
- SMT

KEY QUESTIONS ANSWERED

1. How big is the Netherlands used construction equipment market?
2. What is the expected number of construction equipment units sold by 2029 in the Netherlands used construction equipment market?
3. What is the growth rate of the Netherlands used construction equipment market?
4. What are the key trends in the Netherlands used construction equipment market?
5. Who are the key players in the Netherlands used construction equipment market?

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