Europe Transportation Infrastructure Construction - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 150 pages | Mordor Intelligence

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Report description:

The Europe Transportation Infrastructure Construction Market size is estimated at USD 219.56 billion in 2024, and is expected to reach USD 279.58 billion by 2029, growing at a CAGR of 4.14% during the forecast period (2024-2029).

The development of sustainable and energy-efficient transportation infrastructure is what drives the market. Furthermore, the adoption of electric vehicles on a large scale is demanding huge infrastructure investments, which is driving the market.

In the case of Ireland, the only investment in transportation is the electrification of the Cork commuter rail network. An increase in the Suburban Rail System's capacity is also on the agendas of Hungary, France, Greece, and Portugal. Ten plans call for infrastructure modernization or upgrades, while eight plans call for the electrification of various rail sections. Austria, Estonia, Italy, and Spain intend to build new rail connections, mostly along the trans-European transport corridor (TEN-T), some of which will be high-speed. Spain, France, Italy, and Hungary intend to renovate or upgrade their regional and local transportation lines, whereas Croatia and Hungary intend to improve their networks by eliminating existing bottlenecks.

The European Commission will put a lot of effort into getting people to use alternative fuels. This will help cut down on pollution and create jobs. The EU's governing body wants to speed up the development of low-emission fuels and the use of ships and cars that are better for the environment. The FuelEU proposals (FuelEU Maritime and ReFuelEU Aviation) that set out a pathway for sustainable fuels to be used in the maritime and aviation sectors work out the details of the fuel mix for the future of the EU transport sector. The RED III is the new version of the Renewable Energy Directive. It sets goals for the EU's overall energy mix, with the goal of increasing the share of renewable energy, electricity, and hydrogen.

High-speed rail is undoubtedly more 'green' and sustainable than other modes of mass transportation. Still, it is fraught with

complications, not least the technology required and the cost of purchasing land in often densely populated areas. HS2, the United Kingdom's high-speed rail project, is currently Europe's largest infrastructure project, employing many of the region's largest contractors, including Vinci, Skanska, Strabag, Balfour Beatty, Eiffage, Kier, and BAM Nuttall. There have also been controversies surrounding the project's compulsory purchase of land and homes; a recent report stated that the company behind HS2 was "dishonest and misleading" in its handling of a compensation claim from a member of the public who had to sell their home to make way for the line.

While some airport projects were canceled or postponed as a result of COVID-19, many new projects moved forward and were resurfaced, and maintenance work carried on. One such project was the renovation of runway 25 at Brussels Airport in Belgium, which was 3.3km long and 45m wide. The airport's operations team understood that this work would have to be done quickly, accurately, and safely. This meant that an all-encompassing solution would be critical to the project's success. Topcon Positioning's intelligent milling and paving solutions were used, as well as the cold planing expertise of Top-Off, which assisted general contractor Willemen Infra. Another example of technology being used in transportation projects is the role that BIM (Building Information Modeling) will play in the restoration and extension of the Gent-Sint-Pieters railway station in Ghent, Belgium.

Europe Transportation Infrastructure Construction Market Trends

Rise in European investment in Transport Infrastructure

The Connecting Europe Facility (CEF), the EU's vehicle for strategic investment in transport infrastructure, has selected 107 transport infrastructure projects to receive approximately EUR 6 billion (USD 6.31 billion) in EU grants. On the trans-European transport (TEN-T) network, more than 80% of the funds will go into initiatives that will create a more effective, environmentally friendly, and intelligent network of railroads, inland waterways, and maritime routes. Additionally, projects will likely support the EU-Ukraine Solidarity Lanes, which were established to ease Ukraine's exports and imports.

The TEN-TEN core network's major cross-border rail connections have also been given funding priority. These include, among others, the cross-border stretch between Germany and the Netherlands (Emmerich-Oberhausen), the Brenner Base tunnel (connecting Italy and Austria), Rail Baltica (connecting the three Baltic States and Poland with the rest of Europe), and others. To reduce greenhouse gas emissions from moored vessels, maritime ports in Ireland, Greece, Spain, Latvia, Lithuania, the Netherlands, and Poland will get money for the development of on-shore power supplies. Infrastructure along the Seine-Scheldt cross-border rivers between France and Belgium will be updated to assist in making inland waterway travel future-proof. Additionally upgraded are inland ports on the Danube and Rhine basins, including Vienna and Andernach.

Growth in e-vehicle transportation driving infrastructure market

Despite the pandemic-related construction slowdown, public charging expanded. Access to public charging will need to expand as EV markets grow. Today, the majority of EV charging takes place at people's homes and workplaces. Consumers will increasingly expect EVs to provide the same services, simplicity, and autonomy as conventional vehicles. In 2021, the number of publicly accessible chargers worldwide approached 1.8 million, with fast chargers accounting for one-third of the total. In 2021, nearly 500,000 chargers were installed. The number of publicly accessible chargers increased by 37% in 2021, compared to 45% in 2020 and pre-pandemic rollout rates. Between 2015 and 2019, the average annual growth rate was nearly 50%.

Europe was projected to be second with over 300,000 slow chargers in 2021, a 30% increase year over year. The Netherlands leads Europe with over 80,000 slow chargers, with 50,000 in France, 40,000 in Germany, 30,000 in the United Kingdom, 20,000 in Italy, and slightly more than 12,000 in both Norway and Sweden. Public fast chargers make longer journeys easier. As they become more widely available, they will allow for longer trips, encourage consumers who do not have access to private charging

to purchase an EV, and address range anxiety as a barrier to EV adoption.

The average EV-to-charger ratio in the European Union in 2021 was 14, up from nearly 11 in 2020 and well above the recommended level of 10. The average kW/EV ratio was slightly higher than 1 kW, which is the level proposed in the AFIR for 2030. Some countries have done a better job of meeting their goals than others, like the Netherlands (5 and 2.6 kW per EV ratio), which used a wide-scale, on-demand, slow charger deployment strategy. In the Netherlands, the proportion of fast chargers remains low, at around 3%. Due to slow charger availability, Italy roughly meets the recommended charger ratios (11 EVs per charger).

Europe Transportation Infrastructure Construction Industry Overview

The European transportation infrastructure construction market is relatively fragmented, with a large number of local players, including VINCI, ACS Construction Group, Bouygues, HOCHTIEF, and Eiffage.

The demand for sustainability and technological advancements in the transport infrastructure market is increasing, and companies in the region are expected to adopt them and remain competitive.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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