

Germany Mobile Crane Market Forecast 2024-2032

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Report description:

KEY FINDINGS

The Germany mobile crane market is estimated to grow at a CAGR of 5.89% over the forecast period of 2024-2032. The market was valued at \$1256.89 million in 2023 and is expected to reach a revenue of \$2102.64 million by 2032.

MARKET INSIGHTS

Germany is a dominant force in the Europe mobile crane market, supported by its numerous manufacturing plants and its status as the world's leading exporter of mobile cranes. Renowned for advanced engineering and manufacturing expertise, Germany produces high-quality mobile cranes that are in demand globally. The market continues to expand due to strong infrastructure projects and robust export activities. A key factor driving this growth is the National Rail Infrastructure Plan, which allocates EUR86 billion (USD 100.8 billion) to enhance the national railway system. This significant investment requires mobile cranes for a range of tasks, including lifting pre-fabricated concrete segments, installing overhead electrical wires, and placing heavy construction equipment, all vital to Germany's infrastructure development.

Germany's commitment to renewable energy also presents considerable opportunities for its mobile crane market. The amendment to the Renewable Energy Sources Act (EEG) is accelerating renewable energy projects, boosting the need for mobile cranes in the construction of wind and solar power facilities. In wind projects, cranes are used to lift and assemble key components such as towers, nacelles, and blades, while solar projects rely on cranes for positioning and securing heavy support structures. Furthermore, plans to explore domestic mineral resources and upgrade aging infrastructure will increase the demand for cranes. Mining operations and infrastructure refurbishment, including tasks like replacing bridge beams and repairing buildings, rely heavily on mobile cranes, further driving market growth.

SEGMENTATION ANALYSIS

The Germany mobile crane market segmentation incorporates the market by terrain type, carrier type, and application. The application segment is further differentiated into construction, oil and gas, manufacturing, maritime applications, wind, wood cutting and forestry, and other applications. The construction industry has steadily rebounded from the challenges posed by the 2020 pandemic, overcoming issues such as supply chain delays, material shortages, and labor constraints.

Despite these obstacles, the industry has shown consistent growth, increasing from \$12.9 trillion in 2021 to an estimated \$14.3 trillion in 2024, according to industry reports. This growth has fostered higher demand for mobile cranes, essential for their versatility across diverse terrains, from urban environments to remote infrastructure projects. Mobile cranes' operational flexibility, coupled with advancements in low-emission technology, has made them crucial in the sector. Innovations like the MK

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140-5.1 hybrid crane, set for release in 2024, are further boosting adoption, aligning with global efforts toward sustainable construction practices.

In manufacturing, mobile cranes, particularly all terrain cranes, are widely used due to their suitability for paved roads common in manufacturing plants. These cranes play a key role in the installation and maintenance of machinery, facilitating the movement of heavy equipment and tools to ensure smooth production lines. While truck cranes are commonly used, crawler-mounted cranes are also employed during the initial setup of plants and machinery. Additionally, mobile cranes assist in handling raw materials and finished products, supporting logistics operations such as loading and unloading. Their use in assembly lines and warehouses enhances efficiency, boosting capacity, streamlining production, and delivering significant time and cost savings.

Mobile cranes are vital in maritime applications, particularly in cargo ports for loading and unloading, shipbuilding, and dockyard maintenance. The market is expanding as manufacturers like Liebherr introduce innovative solutions, with record sales reported in 2021. These cranes efficiently handle containers and heavy machinery between ships and trucks and assist in constructing new vessels by lifting pre-fabricated sections. They also play a crucial role in maintaining existing ships and port infrastructure, managing heavy materials such as concrete slabs and support structures, and ensuring effective upkeep of port facilities.

Moreover, cranes are essential throughout the lifecycle of wind turbines, from construction to maintenance and decommissioning. During the initial construction phase, large mobile cranes, such as 600-ton all-terrain models, lift and assemble turbine components, handling weights up to 90 tons at heights exceeding 300 feet. As wind turbines grow larger, with rotors up to 400 feet in diameter and towers over 300 feet tall, the demand for these cranes increases. For maintenance, 350-600-ton cranes are used to replace major components like gearboxes and blades, extending the operational life of wind farms by up to 10 years. When decommissioning, cranes are employed to safely dismantle turbines, mirroring the construction process for careful disassembly.

COMPETITIVE INSIGHTS

Some of the leading players in the Germany mobile crane market are Terex Corporation, Liebherr Group, Palfinger, etc. Terex Corporation, based in Norwalk, Connecticut, USA, is a prominent global manufacturer of lifting and material processing products and services. Its extensive product portfolio encompasses equipment used in construction, infrastructure, manufacturing, shipping, transportation, refining, energy, utilities, quarrying, and mining. Terex is well-known for its brands, including Terex, Genie, Powerscreen, and Demag. The company caters to a diverse clientele, including various industries, contractors, and government entities, with an emphasis on providing reliable, innovative, and sustainable solutions. Terex has a broad international presence, serving customers in over 80 countries.

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