

## **U.K. Crawler Excavator Market - Strategic Assessment & Forecast 2024-2029**

Market Report | 2024-10-28 | 166 pages | Arizton Advisory & Intelligence

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### **Report description:**

The U.K. crawler excavator market is expected to grow at a CAGR of 2.87% from 2023 to 2029.

Growing Government Investment in Infrastructure Projects

- With the rising concern for Environmental safety, the OEMs of crawler excavators are upgrading the engine standard to stage V emission norms. Several OEMs have recently launched electric crawler excavators in the UK industry in 2024.
- The demand for crawler excavators is expected to decline slightly in 2024 due to various industry challenges, such as rising inflation and a surge in building material costs. However, the industry is expected to recover gradually from 2025 onwards.
- The rising inflation rate is expected to negatively impact the United Kingdom crawler excavator industry, resulting in a surge in building material costs.

### **KEY HIGHLIGHTS**

- In 2023, mini-size excavators will have the largest market share in the U.K. crawler excavator market due to their versatile use in the construction and mining industries.
- The rise in public infrastructure, mining, and renewable energy projects drives the sales of crawler excavators in the UK.
- In 2023, the construction end-user accounted for the largest U.K. crawler excavator market share.
- The U.K. is the largest producer of construction equipment in Europe and the fifth largest producer after China, Japan, the US & India in the global market. The country is the leading producer of crawler excavators in the European market.
- JCB maintains a significant revenue and unit production lead, followed by Caterpillar & Komatsu in the UK market in 2023.
- The production of hydraulic excavators in the U.K. primarily focuses on JCB in Staffordshire, which serves the domestic industry. In 2020, JCB expanded its capacity to 7,400 units to meet increased local demand, a target surpassed in 2022.
- In 2024, XCMG awarded Molson Group the distribution rights to its excavators in Scotland. The Molson Group will support sales, service, and aftermarket care for XCMG excavators in the U.K. market.
- Hyundai launched new 100-tonne HX1000A L and 80-tonne HL985A Stage V crawler excavators. These machines are designed to

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operate in mines and quarries and in bulk earthmoving for construction and infrastructure project applications.

- In 2024, SANY launched a 78-tonne crawler excavator in the UK market. SANY SY750H is the largest crawler excavator with a Stage V standard engine in the U.K. crawler excavator market.

- The demand for mini and small crawler excavators is strong in comparison to medium & large size crawler excavators in the U.K. crawler excavator market. Rising environmental concerns have a negative impact on the demand for large crawler excavators in the UK industry.

#### Segmentation by Crawler Excavator

- Size

o Mini Excavator

o Small Excavator

o Medium Excavator

o Large Excavator

- Gross Power

o Less Than 60 HP

o 60 HP -100 HP

o 101 HP-200 HP

o Above 200 HP

#### Segmentation by End Users

- Construction

- Mining

- Agriculture

- Forestry

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

### MARKET TRENDS & DRIVERS

#### Growing Demand for Modern Technology Excavators

- Technological development has increased the demand for construction equipment in the U.K. crawler excavator market, including crawler excavators. Modern equipment offers several features that increase productivity, reduce fuel consumption, & have a low environmental impact.

- There has been a surge in environmental safety concerns in the UK industry. The government has placed a greater emphasis on sustainability and tightened the country's emission laws, leading to the demand for electric and hybrid crawler excavators in the U.K. crawler excavator market.

- The construction sector also witnessed significant transformation due to the rise in automated and semi-automated technologies. These technologies help reduce the project deadline, increase operator safety, and improve accuracy.

#### Surge in Demand for Demolition Excavators in the U.K. Crawler Excavator Market

- The U.K. government is investing in various renovation and rebuilding projects nationwide. Several aged infrastructures have been demolished for renovation purposes, which has prompted the use of demolition excavators in the United Kingdom crawler excavator industry. Crawler excavators with high durability are used for demolition. High-durable equipment can withstand demolition projects.

- Hitachi Construction Machinery in Europe sells crawler excavators designed solely for demolition. These machines provide

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excellent protection in the cab and outstanding durability for the most challenging demolition projects. They can reach up to 40 and are fitted with mono, two, or three-piece booms.

#### Increased Investments Under the National Infrastructure and Construction Pipeline to Support the U.K. Crawler Excavator Market

- The U.K.'s significant infrastructure pipeline comprises projects funded by both public and private sources. Energy and utilities such as water and electricity/gas transmission, which are privatized sectors, rely heavily on private financing. Private funding is crucial for the UK's transition to net zero.
- Transport and social infrastructure projects primarily receive funding from the public sector or through a combination of public and private sources.
- The energy sector is expected to receive the largest share of funding, totaling USD 337.2 billion, covering the Hinkley Point C and Sizewell C projects and nuclear decommissioning efforts.

#### Rise in Investments in Green Energy Projects

- In November 2023, the U.K. government planned to invest USD 1,201 million in the Green Industries Growth Accelerator to bolster clean energy manufacturing. This funding, available from 2025 for five years, targets the development of domestic clean energy supply chains, encompassing the areas of carbon capture, electricity networks, hydrogen, nuclear, and offshore wind. It is aimed at providing long-term certainty for industry investments.
- In April 2024, RWE, a prominent U.K. power producer, signed a significant deal to provide clean electricity to Kerry Group's UK facilities for more than ten years.
- A surge in investment in green energy projects is expected to drive the demand for large and medium-sized excavators in the U.K. crawler excavator market during the forecast period.

#### INDUSTRY RESTRAINTS

##### Increased Construction Costs

- According to the Building Cost Information Service (BCIS) forecast in March 2024, both tender prices and building costs are projected to rise over the next five years. New construction output is expected to contract further by 3.2% in 2024 before rebounding after a 2.1% decrease in 2023.
- Total new work output from 2024 to 2029 is expected to grow by 21%. Building costs are predicted to increase by 15% over the next five years, while tender prices are expected to rise by 17% during the same period.

##### Shortage of Skilled Labor

- The construction industry is among the largest sectors in the UK. However, it faces challenges recruiting new talent and acquiring the necessary skills. The most recent Construction Skills Network (CSN) report indicates that approximately 225,000 new construction workers will be required by 2027 to meet the industry's demands.
- Post-Brexit immigration rules added further pressure to the existing skilled labor shortage. Brexit led to a shortfall of 330,000 people in the U.K. labor force. In June 2022, the Office for National Statistics (ONS) highlighted an overall reduction in net immigration of 540,000. Around 460,000 EU-origin workers would have moved to the U.K. had Brexit not happened, according to the report.
- The scarcity of skilled workers is one of the significant restraints negatively impacting the construction industry, directly affecting the U.K. crawler excavator market.

#### VENDOR LANDSCAPE

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-[]CB, Hitachi Construction Machinery, Caterpillar, Komatsu, and Volvo Construction Equipment have a strong market share in the U.K. crawler excavator market. These manufacturers are market leaders in the industry.

-[]Bobcat, Takeuchi, LiuGong, John Deere, Mecalac, Yanmar, and Wacker Neuson are niche players in the U.K. crawler excavator market. These manufacturers offer little product diversification and are more concentrated in the local market.

#### Prominent Vendors

- []Caterpillar
- []Komatsu
- []Xuzhou Construction Machinery Group (XCMG)
- []Liebherr
- []Volvo Construction Equipment
- []Hitachi Construction Machinery
- []CB
- []SANY
- []Kobelco
- []Hyundai Construction Equipment
- []Takeuchi Manufacturing Co., Ltd.
- []Zoomlion Heavy Industry Science&Technology Co., Ltd.
- []Kubota
- []CNH Industrial
- []John Deere

#### Other Prominent Vendors

- []LiuGong
- []Yanmar
- []DEVELON
- []Hidromek
- []Bobcat
- []Sunward Intelligent Equipment Group
- []Mecalac
- []Wacker Neuson

#### Distributor Profiles

- []Gordons Construction Equipment
- []Molson Group
- []Dennis Barnfield Ltd
- []Warwick Ward
- []Ernest Doe & Sons Ltd
- []SMT GB

#### KEY QUESTIONS ANSWERED:

- 1.[]How big is the U.K. crawler excavator market?

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2. Who are the key players in the U.K. crawler excavator market?
3. What is the growth rate of the U.K. crawler excavator market?
4. What are the trends in the U.K. crawler excavator industry?
5. Which are the major distributor companies in the U.K. crawler excavator market?

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#### 11.1 Competitive Landscape Overview

11.2 Prominent Vendors (Caterpillar | Volvo Construction Equipment| Komatsu | Hitachi Construction Machinery  
| JCB | Hyundai Construction Equipment | Kobelco| Kubota| |Yanmar |SANY| XCMG| Link Belt| Bobcat | Zoomlion | liuGong| Yauchi|  
Develon)

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