

Poland Construction Equipment Market - Strategic Assessment & Forecast 2024-2029

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Report description:

The Poland construction equipment market is expected to grow at a CAGR of 4.30% from 2023 to 2029.

Recent Developments in the Poland Construction Equipment Market:

- In June 2024, Terex Self-Erecting Tower Cranes appointed the Elevating Work Platform Association (EWPA), based in the Poznan region as its distributor for Poland. EWPA has placed an initial order for a 4-ton CBR 40H crane, featuring a 40-meter jib with a 1-ton jib tip capacity, and a 4.4-ton CSE 32 with a 32-meter jib and a 1.05-ton jib tip capacity.
- In August 2024, Poland's Centralny Port Komunikacyjny (Central Communication Port) initiated a tender for constructing a 4.6-kilometre tunnel for High-Speed Rail in Lodz, Poland. This megaproject, overseen by the Polish government, aims to build a new airport from the ground up approximately 40 km southwest of Warsaw.
- In July 2024, Sinoboom announced to production of European-specific boom and scissor lifts at its plant in Poznan, Poland. This move aims to build machines closer to their end markets, reducing reliance on imports. By 2025, Poznan-built machines will largely use European components.

KEY HIGHLIGHTS

- Material handling equipment accounted for the largest market share in the Poland construction equipment market in 2023. Forklifts & Telescopic Handlers in the material handling segment accounted for the largest share in 2023. Significant investment in the country's industrial sector is driving the growth of a number of logistics infrastructures across the country.
- Demand for material handling equipment is growing due to the rising investment in port expansion projects and the development of warehouses and logistics parks across the country.
- In 2023, the earthmoving segment accounted for a significant share of the Poland construction equipment market.
- Road rollers sales are high in Poland in response to the rising renovation and expansion of roads. For instance, in 2024, Budimex secured a USD 195.2 million contract to construct Section 3 of the S17 expressway, an 18.8 km segment between Krasnystaw Polnoc and Izbica, near Poland's border with Ukraine.

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-□ Construction equipment utilization in the Poland construction equipment market by end-user (volume) has the largest industry share in 2023.

-□ In 2024, the government published a draft budget for 2025, allocating more than USD 2.2 billion to support mining. Hard coal production in the region has fallen by over 17% and sales by almost 18% compared to previous years.

-□ Therefore, the Polish construction industry is witnessing significant growth due to economic recovery and considerable government investments in industrial facility development, resulting in a heightened demand for high-quality construction equipment.

Segmentation by Type

-□ Earthmoving Equipment

o□ Excavator

o□ Backhoe Loaders

o□ Wheeled Loaders

o□ Other Earthmoving Equipment (Other loaders, Bulldozers, Trenchers, Motor Graders)

-□ Road Construction Equipment

o□ Road Rollers

o□ Asphalt Pavers

-□ Material Handling Equipment

o□ Crane

o□ Forklift & Telescopic Handlers

o□ Aerial Platforms (Articulated Boom Lifts, Telescopic Boom lifts, Scissor lifts)

-□ Other Construction Equipment

o□ Dumper

o□ Tipper

o□ Concrete Mixer

o□ Concrete Pump Truck

Segmentation by End Users

-□ Construction

-□ Mining

-□ Manufacturing

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

MARKET TRENDS & DRIVERS

Poland's Hydrogen Strategy to Boost the Poland Construction Equipment Market

-□ The country has been focusing on energy diversification and reducing reliance on fossil fuels. Hydrogen technology represents a path to greater energy independence. Construction companies may be encouraged to invest in hydrogen-powered machinery to stay competitive, stimulating demand.

-□ Many construction firms in the region may need to upgrade their machinery to meet the new emission standards. The shift to hydrogen fuel cells presents an opportunity to modernize fleets, leading to a surge in demand for new hydrogen-powered construction equipment in the Poland construction equipment market.

Increasing Trend for Prefabricated Construction in Poland to Boost the Sales of Cranes

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-[]Poland's modular construction sector has seen substantial growth, with market value rising nearly 50% over the last two years, driven by material variety and rising costs of materials and labor.

-[]Prefabrication allows for faster construction times, reducing projects' timelines by up to 50% compared to traditional buildings. This is crucial in the country, where urbanization has increased demand for both residential and commercial spaces.

Increasing Investment in the Construction Sector in Poland

-[]Poland's construction sector started 2024 with optimism, boosted by USD 12.2 billion from the EU for the National Reconstruction Plan (KPO). By mid-year 2024, USD 2.2 billion in grants had already been disbursed from the USD 12.2 billion grant, mainly benefiting the energy sector.

-[]Additionally, a major upcoming project the Central Communication Port (CPK) near Warsaw is underway, designed as a multimodal hub integrating air, rail, and road transport. Construction is expected to be completed in 2031.

Growing Development of the Nuclear Power Plants

-[]Poland is making major strides in its Nuclear Energy Strategy, aimed at reducing its coal dependency and enhancing energy security. The strategy aims to accomplish its target to have between 6-9 gigawatts (GW) of nuclear power by 2043.

-[]In 2024, the government selected Westinghouse Electric Company, in partnership with Bechtel, to develop Poland's first nuclear power plant at the Lubiatowo-Kopalino site in northern Poland, with the AP1000 reactor technology.

INDUSTRY RESTRAINTS

Slow Economic Growth Is Impacting the Construction Industry

-[]Poland's industrial recovery has slowed, with industrial production in September down by 0.3% year-on-year, against a forecasted 0.8% decline. Seasonally adjusted output decreased around 1.0% quarter-on-quarter in Q3. Strong domestic consumption, estimated at 4.0% year-on-year in Q3, isn't sufficient to drive expansion in the industrial sector.

-[]Additionally, residential construction in Poland is declining, partly due to the expiration of the previous government's mortgage subsidy program at the end of 2023. A new program has yet to be approved within the government coalition.

Skilled Labor Shortage in the Country

-[]According to a government survey report of 2024, almost 80% of construction companies operating in the residential construction segment are struggling with rising costs, and over 75% are suffering from delays caused by labor shortages.

-[]Despite having one of the strongest labor markets in the EU and a very low unemployment rate, Poland continues to face considerable labor shortages in various sectors. As of May 2024, the registered unemployment rate in Poland was 5%, the lowest since November 2023.

VENDOR LANDSCAPE

-[]Caterpillar, Liebherr, Komatsu, JCB, Volvo CE, and Hitachi Construction Machinery are the front runners in the Poland construction equipment market. These companies have a strong market share and offer diverse sets of equipment in the Poland construction equipment market.

-[]Terex, Tadano, Jungheirich AG, Manitou, Merlo Spa, Mecalac, Wacker Neuson, Yanmar, Takeuchi, and Ammann are niche players in the Poland construction equipment market. These companies offer low product diversification and have a strong presence in the country's market.

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Prominent Vendors

- [] Caterpillar
- [] Komatsu
- [] Volvo Construction Equipment
- [] Hitachi Construction Machinery
- [] Liebherr
- [] JCB
- [] SANY
- [] Xuzhou Construction Machinery Group Co. Ltd. (XCMG)
- [] Kobelco
- [] HD Hyundai Construction Equipment
- [] CASE Construction Equipment
- [] Kubota

Other Prominent Vendors

- [] Bobcat
- [] DEVELON
- [] LiuGong
- [] Tadano
- [] Terex Corporation
- [] Jungheinrich AG
- [] Manitou
- [] Haulotte
- [] Mecalac
- [] Yanmar
- [] Takeuchi
- [] Ammann
- [] Wacker Neuson
- [] H?DROMEK
- [] SUMITOMO CONSTRUCTION MACHINERY CO., LTD.
- [] MERLO S.p.A
- [] AUSA
- [] LG
- [] TCM Forklifts

Distributor Profiles

- [] Warynski Trade Sp. o.o.
- [] M&M Polska Sp. z o.o.
- [] Toolmex Truck Sp. z o.o.
- [] EWPA Sp. z o.o.
- [] Kiesel Poland Sp. z o.o.

KEY QUESTIONS ANSWERED:

1. [] Which are the major distributor companies in the Poland construction equipment market?
2. [] What are the trends in the Poland construction equipment market?
3. [] How big is the Poland construction equipment market?

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4. □What is the growth rate of the Poland construction equipment market?
5. □Who are the key players in the Poland construction equipment market?

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