

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

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Report description:

The Netherlands construction equipment market is expected to grow at a CAGR of 5.52% from 2023 to 2029.

Recent Developments in the Netherlands Construction Equipment Market:

- In October 2024, Komatsu Europe introduced its next-generation wheel loaders, the WA475-11 and WA485-11. These models feature a new Komatsu diesel engine and an innovative hydro-mechanical transmission (HMT). Key advancements include higher payload capacities and bucket volumes, ensuring fewer loading cycles and enhanced productivity.
- In September 2024, Develon introduced the DX235RTF-7, a tunneling excavator designed specifically for confined underground environments in Europe including the Netherlands market. Built on the platform of the compact DX235LCR-7 excavator, this model features a Stage-V-compliant DL06V engine delivering 141 kW (189 hp).
- In June 2024, Sany launched its first medium-sized electric excavator, the SY215E, in Europe including the Netherlands market, signifying a major step in its strategy to expand its electric construction machinery lineup internationally. The launch event was held in the Netherlands in partnership with DNL Machine & Equipment, Sany's local dealer.

KEY HIGHLIGHTS

- Earthmoving equipment accounted for the largest market share in the Netherlands construction equipment market in 2023. Excavators in the earthmoving segment accounted for the largest share in 2023. The country's investment in renovating its public infrastructure drives the growth of the Dutch earthmoving market.
- On the other hand, demand for material handling equipment is also growing due to the rising number of wind power projects and the development of warehouses and logistics parks across the country.
- In 2023, the earthmoving segment accounted for a significant share of the Netherlands construction equipment market.
- Road rollers sales are high in the Netherlands in response to the rising renovation and expansion of public transit and airports. As

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per the latest update from the government in November 2024, The MA Reinaldaweg (N210) in Lopik is undergoing major maintenance works. In this section of the N210, the asphalt, foundation, and roadside paving will be reviewed.

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

-□In 2025, the Dutch city of Utrecht is set for a major residential expansion with plans to develop over 5,000 new homes across multiple construction sites, including notable projects like the Cartesiusdriehoek and the Merwedekanaalzone.

-□The construction sector's total output decreased by 2.5% in 2024. In 2025, there will be a recovery for the Dutch construction industry, mainly due to the rise in new build production of homes. Technological innovations such as prefabricated construction, 3D printing, and the use of digital building models (BIM) offer opportunities to work more efficiently and increase labor productivity.

-□The Netherlands is going through a significant nitrogen crisis. In 2024, the Netherlands government introduced a scheme "Subsidy Scheme Clean and Emission-free Construction Equipment (SSEB)" which can be applied for several parts and the maximum subsidy amount per construction machine is USD 316 thousand.

-□Economic challenges like inflation, rising interest rates, and a global slowdown have slowed the Dutch construction industry. The country is witnessing a severe housing shortage. According to the Housing Market Survey 2024-2039, conducted in October 2024, this shortage will increase in the coming years before it improves. The shortage is not expected to start decreasing until after 2027.

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

Electrification of Construction Equipment

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- Dutch legislation, including the Climate Act, Clean Air Agreement, and Climate Agreement, has reinforced the efforts to achieve its carbon neutrality target by setting strict emissions targets and promoting electricity use across sectors like industry and construction.
- Electrification in construction equipment is advancing as the sector faces strict emission limits. The Dutch construction sector, impacted by nitrogen emissions, is transitioning to zero-emission machinery, with initiatives like the Clean and Emission-Free Construction (SSEB) program aiming for a fully electric fleet by 2035.

Increased Investment in Hydrogen Fuel Projects

- In 2024, seven Dutch hydrogen projects have secured nearly USD 264 million in subsidies to boost sustainable hydrogen production.
- These initiatives will establish a combined electrolysis capacity of 101 MW, utilizing renewable sources like solar and wind energy.
- The projects include H2 Hollandia, Hysolar, RWE Eemshydrogen, and others, with goals ranging from creating green hydrogen for industrial and transport use to innovating energy integration. These initiatives will gradually replace conventional diesel fuel equipment.

Increased Investment in the Renovation of Public Infrastructure

- The surge in renovation and maintenance work to ensure continued accessibility and functionality of transport networks is likely to increase the sales of construction equipment and support the Netherlands construction equipment market growth.
- Additionally, in 2024 the government planned to allocate USD 210.8 million to restart previously halted road projects. Regions affected by these paused projects have submitted various proposals aimed at improving accessibility.

Rise in the Number of Wind Power Projects

- As of 2023, renewable sources in the Netherlands make up 40% of the total electricity production, showing an increase from 33% the previous year. The leading energy sources in the Netherlands were natural gas (40%), wind (18%), solar (15%), coal (14%), and biomass (7%).
- By 2050, the Netherlands aims for all its energy to come from sustainable sources, with offshore wind energy playing a key role due to the North Sea's favorable conditions. Offshore wind has become the most cost-effective large-scale sustainable energy source. The energy transition will also include other renewable sources like onshore wind, solar, and biomass.

INDUSTRY RESTRAINTS

Housing Shortage in the Netherlands

The housing shortage in the Netherlands has intensified, impacting nearly every village and city. Since 2022, the estimated shortage has increased from 291,000 to 401,000 homes. To address this, the Dutch government has raised its housing target from 900,000 to 981,000 new homes by 2030. Furthermore, the shortage is caused by a combination of population growth, a sharp increase in the number of households, and housing production that has lagged in recent years. Between 2024 and 2038, 885,000 new households are expected, which represents a growth of 10.6%.

Grid Congestion Is Becoming a Challenging Factor

The Netherlands construction equipment market is expected to witness a grid congestion challenge in 2025, as the limited

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capacity of the electricity grid causes delays in many construction projects. This often prevents new buildings and homes from receiving timely connections, resulting in project delays and increased costs. Grid Congestion is a challenge witnessed in the Almere region of the Netherlands. The grid in the region is at full capacity, leaving no room for new connections, and similar issues are emerging in other cities, with some neighborhoods left without power.

VENDOR LANDSCAPE

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

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

Prominent Vendors

- [] Caterpillar
- [] Volvo Construction Equipment
- [] Komatsu
- [] 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
- [] Sunward
- [] Ammann
- [] Wacker Neuson
- [] H?DROMEK
- [] MERLO S.p.A
- [] AUSA
- [] LG

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Distributor Profiles

- [] Holland Machinery
- [] Pon Cat
- [] SMT Netherlands
- [] Boss Machinery
- [] BIG Machinery
- [] Van der Spek Vianen B.V.

KEY QUESTIONS ANSWERED:

1. [] How big is the Netherlands construction equipment market?
2. [] What is the growth rate of the Netherlands construction equipment market?
3. [] What are the trends in the Netherlands construction equipment market?
4. [] Who are the key players in the Netherlands construction equipment market?
5. [] Which are the major distributor companies in the Netherlands construction equipment market?

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