

Europe Construction Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Construction Equipment Market size is estimated at USD 54.46 billion in 2025, and is expected to reach USD 76.25 billion by 2030, at a CAGR of 6.96% during the forecast period (2025-2030).

Rapid urbanization and industrialization, as well as the growing government investments in infrastructure development and the expansion and growth of real estate and construction companies throughout the region, are some of the factors that are anticipated to boost demand in the market.

Additionally, emerging economies invest significantly in infrastructure development to address traffic congestion, population growth, and aging transportation infrastructure. They also focus on innovations such as the hyperloop and earthquake-resistant construction to upgrade their existing infrastructure. Due to these factors, the construction equipment market in Europe is experiencing sales growth.

The demand for cost-effective machines, combined with regulatory pressures for lower emissions, is pressuring construction equipment manufacturers to choose electric and hybrid vehicles over traditional hydraulic and mechanical vehicles. As a result, progress in the electrification of construction equipment is accelerating.

Some companies are adopting strategies to gain a significant market share, such as developing advanced technology and launching new construction equipment to cater to their customers better. For instance:

Key Highlights

- In June 2023, Caterpillar Inc. introduced the advanced Cat 995 Wheel Loader. This new model boasts a significant 19%

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improvement over its predecessor. Additionally, it promises a reduction in hourly fuel consumption by up to 13% and an efficiency boost of 8%.

- In March 2023, Caterpillar announced the new Cat Smart Grader Blade and Smart Dozer Blade options. The new external control kit for the GB120 and GB124 smart grader blades expands the use of these blades to Cat D and D2 series SSL and CTL machines, enabling customers with previous model fleets to run smart blades.

Additionally, the emergence of technologically advanced equipment, both autonomous and electrified, and government initiatives promoting infrastructure development present new business opportunities for industry participants. The building industry is becoming more intelligent. Development is being accelerated by digitalization, connectivity, and automation, which have a significant impact on building projects.

It is also expected that rental companies will undercut sales of new equipment because they are prepared to invest in new technologies to meet the rising demand for sophisticated construction equipment and replace their outdated fleets with new or upgraded models.

Europe Construction Equipment Market Trends

The Electric Drive Type is Expected to Drive the Growth of the Market

The construction industry has been rapidly shifting toward electric construction equipment because of its many advantages, including cost-effectiveness and environmental sustainability. Growing environmental concerns are a major factor in European nations' growing acceptance of electric construction equipment. Due to stringent regulations to curb carbon emissions and foster sustainability, construction companies seek environmentally friendly substitutes for conventional diesel-powered equipment.

With zero emissions and reduced noise levels, electric construction equipment provides a more environmentally friendly option that is perfect for urban construction sites where noise pollution is an issue. In addition, long-term costs are lower for electric construction equipment. Electric equipment has lower running costs than traditional diesel-powered equipment, even though the initial investment may be higher.

Furthermore, owing to technological advancements, electric construction equipment now performs much more efficiently, making it a good choice for building companies trying to save costs without sacrificing quality.

Key players in the construction equipment manufacturing sector are actively introducing new models of construction equipment in the European region, further driving market growth. For instance:

- In September 2023, LiuGong unveiled a new 21-tonne electric wheeled loader in Europe. This electric wheel loader features a substantial 423kWh lithium iron phosphate battery, exemplifying the industry's commitment to electric technology.
- In July 2023, Komatsu Ltd introduced the PC33E-6, a novel 3-ton class electric mini excavator in Europe. This electric excavator is powered by a 35kWh lithium-ion battery, aligning with the growing trend toward electrification.
- In June 2023, the battery-electric EC230 excavator showed success in a number of commercial applications in Europe and Asia. It is currently offered for sale to a limited number of European clients. Along with the same performance as its conventional diesel counterpart, the 23-ton EC230 Electric excavator also has the advantages of zero emissions, low noise, low vibration, improved controllability, and a lower total cost of ownership. Operators have reported that it achieves a digging force comparable to the Volvo EC200E diesel equivalent, which is achieved with a faster cycle time and significantly reduced noise.

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The segment is expected to witness substantial growth during the forecast period, driven by the advancements listed above across the region.

Germany is Expected to Hold a Considerable Market Share in the Market

The construction equipment market in Germany is being driven by rising investments in enhancing infrastructural capability, the government's focus on building efficient road transportation networks, and the demand for advanced equipment such as electric-powered equipment. The country's expanding construction industry has a massive demand for construction equipment.

- In October 2023, BEOS AG gave Implenia and its joint venture partner Dressler Bau GmbH the construction of two more sections of the groundbreaking BERLIN DECKS city campus in Berlin-Moabit. Implenia is the project's technical lead.
- The German Federal Government and Deutsche Bahn (DB) unveiled the largest and most extensive infrastructure program for the railway network and stations since the 1994 railway reform in September 2023.
- This declaration was made in Frankfurt during the Railway Summit hosted by the Federal Ministry for Digital Affairs and Transport in mid-September 2023.

Various domestic and international manufacturing companies operating in the market are also actively engaging in launching new products and expanding their business presence to cater to the increasing demand in the country, which would positively impact the target market.

Based on the aforementioned points, the market studied is expected to witness significant growth during the forecast period.

Europe Construction Equipment Industry Overview

The European construction equipment market is consolidated, with dominant players like Liebherr and Volvo Equipment. A growing trend is the development of new products that are equipped with advanced technologies to enhance the entire industry's operational efficiency.

In February 2024, Komatsu announced that its new PC33E-6 3-ton class electric mini excavator was expected to make its equipment debut for European equipment buyers at the Intermat 2024 fair in Paris in April 2024. Komatsu claims that the new electric mini excavator is intended to raise the bar for emission-free operations. According to reports, the PC33E-6 will provide class-leading features and outstanding performance to improve construction site safety, cleanliness, and quietness.

In December 2023, Kubota Corporation announced the launch of the KX038-4e electric mini excavator to the European market in the spring of 2024. Kubota aims to achieve carbon neutrality in construction by expanding its range of mini excavators, which are commonly utilized for construction work in urban areas, and include an electric model.

Additional Benefits:

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

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