

## **Europe Construction Machinery Rental - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 111 pages | Mordor Intelligence

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### **Report description:**

The Europe Construction Machinery Rental Market size is estimated at USD 35.33 billion in 2025, and is expected to reach USD 45.41 billion by 2030, at a CAGR of 5.15% during the forecast period (2025-2030).

Over the forecast period, the European construction industry is expected to be supported by a shift in construction businesses toward renting equipment to lower operational costs. The ongoing recovery in the industry is also expected to drive the studied market positively in the coming years.

Over the long term, the market demand is expected to be fueled by the constant need for new infrastructure, increased business in the construction and real estate sectors, and the rapid construction of substantial road infrastructure and smart cities in Europe. The expansion of the industry is also aided by government and construction company initiatives aimed at infrastructural development.

The expansion of the European construction market can be attributed to rising demand for housing in urban areas, increased infrastructural development activities, and increased modernization and renovation of buildings to improve their energy efficiency. With the region's robust economic growth, commercial infrastructure construction, such as offices, schools, hotels, restaurants, and leisure facilities, is rising.

Additionally, various favorable initiatives and investments by governments to improve housing infrastructure and provide housing for the vulnerable section are supporting the growth of the European construction machinery rental market. In September 2023, the German government announced its plans to suspend proposed building regulations as part of a EUR 45 billion (USD 47 billion) relief package to support the struggling construction industry, which is facing high interest rates and rising costs. Berlin plans to

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allocate EUR 18 billion until 2027 for affordable housing, with additional funding from federal states and municipalities.

## Europe Construction Machinery Rental Market Trends

### The Building Construction Industry is Expected to Remain the Focal Point

The expansion of the European construction market can be attributed to rising demand for housing in urban areas, increased infrastructural development, and increased modernization and renovation of buildings to improve their energy efficiency. With the region's robust economic growth, commercial infrastructure construction, such as offices, schools, hotels, restaurants, and leisure facilities, is rising.

Various favorable initiatives and investments by governments to improve housing infrastructure and provide housing for the vulnerable section are also supporting the growth of the European construction machinery rental market. In October 2023, the Czech Republic updated its National Energy and Climate Plan (NCEP), intending to construct 6,000 MW of solar plants, including building a substation and installing PV panels, turbines, generators, and transmission lines by 2030. In March 2024, the European Investment Bank (EIB) approved over USD 111 million for expanding the Kruonis Pumped Storage Hydroelectric Power Plant in Lithuania, aiming to boost capacity from 900 MW in 2023 to 1 GW by 2026.

Developing economies are investing heavily in infrastructural development to address major issues such as traffic congestion, population growth, high manufacturing costs, and aging transportation infrastructure, while developed economies are investing in technologies such as earthquake-proof buildings and hyperloop to improve their current infrastructure. These factors are driving up sales in the construction machinery rental market.

Increasing technological advancements and digitalization in construction equipment are anticipated to offer enormous growth opportunities in the construction machinery rental market during the forecast period. Growing product launches and innovations may further enhance the adoption of small skid steer loaders during the forecast period.

Construction equipment manufacturers are pressured to choose electric and hybrid vehicles over traditional hydraulic and mechanical ones due to the demand for cost-effective machines and regulatory pressures for lower emissions. As a result, the electrification of construction equipment is gaining momentum. For instance,

- In January 2024, Japanese construction machinery manufacturer Komatsu introduced the PC138E-11 electric excavator as a rental machine, first in Japan, followed by Europe. The 13-ton machine is particularly suitable for urban construction projects.

Owing to such developments and rising construction activities, the market is expected to continue to grow during the forecast period.

### Germany Holds the Largest Market Share

Construction rental machinery is a growing market in Germany due to the increasing need for advanced equipment, technological advancements, and the rise in construction activities in the country. Bulldozers, excavators, and cranes are among the most in-demand heavy machinery in Germany. Construction companies are meeting their objectives at a low cost while avoiding high expenses by renting construction equipment.

The growth of the construction industry primarily drives the demand for rental construction machinery. An increase in government

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investment in infrastructure projects is intended to spur economic growth and generate opportunities, which may be favorable to the German construction industry. Additionally, the rise in urbanization and the nation's expanding population may boost the demand for rental construction equipment.

The COVID-19 pandemic significantly impacted the German construction industry, with many construction projects being delayed or canceled. However, the industry has shown resilience, and construction activity has gradually picked up pace as the economy reopened. High demand for construction equipment rentals is expected on the back of infrastructure development projects in the country over the coming years. For instance,

- In February 2024, the Saxony city government unveiled a EUR 105 million (USD 107.5 million) package for housing construction and low-interest loans under 1% with a 25-year fixed rate for purchasing condominiums.

- In December 2023, construction began on the Fehmarnbelt tunnel near the Fehmarn strait to develop an 18.5 km stretch to reduce travel time between Hamburg and Copenhagen from 4.5 hours to 2.5 hours, with completion expected by 2029.
- In July 2023, NeuConnect Interconnector announced the commencement of work on the first UK-German power link project. This project aims to enhance energy security as Europe looks for alternatives to Russian pipeline gas following the invasion of Ukraine.

The demand for construction equipment rentals is expected to grow in the coming years. The need for affordable solutions to address equipment requirements, rising government spending on infrastructure projects, and the expansion of the construction industry are expected to contribute to the growth curve of the German construction machinery rental market during the assessment period.

#### Europe Construction Machinery Rental Industry Overview

The European construction rental machinery market is dominated by several key players, including Caterpillar, Kobelco Construction Machinery, Deere & Company, Komatsu Ltd, Volvo Group, Doosan Infracore, and XCMG. The rapid expansion of construction machinery rental services across the region and the increasing acquisitions between key players are expected to boost the market's growth during the forecast period.

- In June 2023, Boels Rental disclosed that it spent EUR 551 million last year to expand and diversify its rental equipment range, now comprising 840,000 items, 81% of which are electric-powered. Much of the investment went into construction equipment with new battery, electric, and hybrid technologies, helping customers meet evolving government regulations and Net Zero targets by reducing their carbon footprints.
- In January 2023, Ardent Hire announced the opening of its new super-hub depot at Chawston, near Bedford. The new facility is on the A1 and offers excellent access to London and the North. With over 6 acres of concreted space, the site includes office and workshop facilities and a new training center that is being built.
- In January 2023, John Deere introduced a new dealer business system powered by Microsoft Dynamics 365 to provide a common technology platform for many aspects of a dealer's business, allowing dealers to capitalize on new opportunities for growth, innovation, and customer insights. Both companies will leverage their expertise to deliver this cutting-edge technology. Dynamics 365 applications will seamlessly integrate John Deere dealers' sales, rental, aftermarket, and administrative capabilities to enable higher levels of process automation and decision-making insights.

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

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