

Europe Excavator And Loaders - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Excavator And Loaders Market size is estimated at USD 21.70 billion in 2025, and is expected to reach USD 30.41 billion by 2030, at a CAGR of 6.98% during the forecast period (2025-2030).

The increase in construction activity is expected to drive demand for excavators and loaders. Government programs such as stimulus packages and lower housing costs that encouraged people to buy new homes are expected to drive market expansion during the forecast period.

With the increased spending from several government authorities in the region on construction and mining activities, the demand for cost-effective machines, along with regulatory pressures for lower emissions, has been pressurizing construction equipment manufacturers to opt for electric and hybrid vehicles over traditional hydraulic and mechanical ones.

Infrastructural growth and development in construction across European countries are likely to enhance the sale of construction equipment during the forecast period. For instance,

Under the Federal Transport Infrastructure Plan (FTIP) 2030, the federal government announced an investment of USD 147.6 billion for the development of road infrastructure in Germany by 2030.

The rise in demand for advanced construction machinery due to an increase in labor cost is also likely to drive the demand for excavators and loaders during the forecast period, which is likely to remain a prominent driver for the market.

As the number of commercial and residential buildings in Europe increases, so does the need for routine maintenance to keep

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them safe places to live and work. As a result, building owners and contractors spend significant amounts of money on building maintenance as well as remodeling old and underutilized rooms to profit from them. As a result, demand for excavators and loaders is increasing, contributing to overall market growth.

Major players in the market are Caterpillar Inc., CNH Industrial NV, Liebherr Group, Komatsu Ltd, and Many others. Considering the growth in demand, major players are working on strategic partnerships and product launches to stay ahead of the competition.

For instance, In May 2024, SMT announced to launch the new 23-tonne Volvo EC230 Electric excavator to the UK market. The model is Volvo CE's first fully electric model in the mid-sized excavator category, which is sustainable to the environment.

Thus, the factors above are projected to induce significant growth in the European excavator and wheel loader market.

Europe Excavator and Loaders Market Trends

Excavator Holds the Highest Share

A rise in excavation activity across the region is likely to increase the demand for excavators in the coming years. In Europe, the rise in investment in the real estate segment still offers attractive opportunities for the market during the forecast period.

Excavators are typically available in two types: wheeled excavators and crawler excavators. Most of the buyers purchased a low-cost crawler excavator over high-cost wheeled excavators because the former equipment offered high stability during digging operations on rough or uneven terrains compared to wheeled excavators.

With the evolving demand by the government to move toward greener vehicles, excavators and loader manufacturers are turning their conventional vehicles to electric and hybrid to adopt the changes. Most automakers are introducing new electric excavator models. For instance,

- In November 2023, Holland displayed its first fully electric mini excavator. The E15X is one of the manufacturer's new range of fifteen mini excavator models that have been designed with compact dimensions and has environmental credentials are further enhanced by its use of eco-friendly biological hydraulic oil, which also extends service intervals, and by the use of cobalt-free lithium batteries.

Over the next five years, the market is anticipated to register robust growth due to big spending on infrastructure projects by the EU countries and the introduction of electric and hydrogen-powered excavators. Several key players are introducing new models of excavators, which, in turn, is anticipated to boost the market during the forecast period. For instance,

- In January 2023, Volvo CE launched mid-size EC230 Electric in Europe. The mid-size electric excavator by Volvo Construction Equipment (Volvo CE) is now available for select customers in Europe.

Companies focus on the development of new models of excavators with enhanced performance characteristics and eco-friendly features to gain momentum in the market studied. This is expected to attract customers during the forecast period.

Hydraulics is Expected to Hold the Highest Share

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Among the various industries that use hydraulic power, the construction sector is one of the major application areas that is most benefited by using hydraulic drive type. Modern machinery equipped with hydraulic systems makes construction work safer, faster, and more efficient.

One of the major factors driving the growth of the market is the growing construction industry, especially in developing countries, owing to numerous growth opportunities in infrastructure, residential, and non-residential sectors.

With the ongoing innovations in the hydraulics drive type, it is being used in various types of construction equipment from powerful excavators to more compact equipment.

The introduction of hydraulics in the construction industry has let more jobs be completed quickly and improved productivity. The science of hydraulics allowed the equipment to complete the range of motion and be held with increased precision as it is an essential part of the current construction industry, and persisting technological advancements will make utilizing hydraulic equipment even more necessary in the future.

With the growth in construction activities in Europe leads to the increased adoption of hydraulic equipment for various activities and companies are expanding its hydraulic equipment offering to cater the demand. For instance,

- In May 2023, Kubota had enhanced its extensive range of innovative construction machinery with the launch of a new 8.5 tonne hydraulic mini-excavator, providing operators with advanced performance and superior operation.

Hence, the growing construction sector in some of the European countries and the development of new excavators and loaders is expected to witness considerable growth in the target market in the upcoming years.

Europe Excavator and Loaders Industry Overview

The European excavator and loaders market is consolidated and led by globally and regionally established players. The companies adopt strategies such as new product launches, collaborations, and mergers to sustain their market positions. For instance

- In June 2024, Komatsu showcased a variety of its latest electrification and digitalization solutions which include a 3-ton PC33E-6 electric mini-excavator for the productive, smart, and clean construction sites of the future. in INTERMAT 2024. Komatsu plans to launch them in Europe in 2025.

Some of the major players in the market include Caterpillar Inc., Komatsu Corp., Liebherr Group, Volvo Construction Equipment, and Deere & Company.

Additional Benefits:

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

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