

## **Germany Elevators and Escalators - Market Size & Growth Forecast 2025-2030**

Market Report | 2025-05-02 | 115 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Germany elevator and escalator market size by new installations is expected to grow at a CAGR of 1.18% from 2024 to 2030.

#### **Recent Developments in The Germany Elevator and Escalator Market**

- The 2025 Schindler Germany elevator line brought modern designs with a fashionable panel combined with digital controls and intelligent cabin features. The Premia 500 tableau stands out as a major feature that uses multimedia display technology for in-cabin real-time information system orientation.
- TK Elevators secured a contract with KVB, which is the public transport provider in Cologne to modernize escalators across Cologne's subway stations in September 2024. This project includes the installation of 23 Victoria-type escalators in many high-traffic stations; starting from the Neumarkt station in the center of the city which would help KVB to improve the passenger experience and operational efficiency.
- KONE Germany used a strategic move in January 2025 by purchasing Aufzug & Service W+S GmbH in South Germany as well as EKS Lift Services GmbH in Rhineland-Palatinate. The recent acquisitions will help KONE establish stronger market control within the German vertical transportation industry.

### **KEY HIGHLIGHTS**

- The German elevator market by new installations is projected to surpass reach 24.1 thousand units by 2030.
- The residential elevator sector dominated the German elevator market in 2024 even though economic power remained limited due to growing interest rates. The recovery of this market will commence in 2025 because government spending on construction activities is expected to rise.
- The machine room traction system maintained the highest market position because of its widespread adoption and efficient performance.
- The commercial sector dominated the industry share in 2024 because multiple public transit infrastructure developments were scheduled.

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- In 2024 parallel escalators made up the largest market segment since they are frequently used in commercial and transit facilities.
- German modernization market experts predict that future demand will reach USD 548 million by 2030 because of low-emission technology applications and energy efficiency enhancements.

#### Elevator Market Segmentation by

##### Machine Type

- Hydraulic and Pneumatic
- Machine Room Traction
- Machine Room Less Traction
- Others
- Climbing
- Elevators
- Industrial Elevators

##### Carriage Type

- Passenger
- Freight

##### Capacity

- 2-15 Persons
- 16-24 Persons
- 25-33 Persons
- 34 Persons and Above

##### End-User

- Commercial
- Residential
- Industrial
- Others
- Public Transit
- Institutional
- Infrastructural

#### Escalator Market Segmentation by

##### Product Type

- Parallel
- Multi Parallel
- Walkway
- Crisscross

##### End-User

- Public Transit
- Commercial
- Others
- Institutional Sector
- Infrastructure
- Industrial

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## GERMANY ELEVATOR AND ESCALATOR MARKET DRIVERS & OPPORTUNITIES

### Sustainable Energy Solutions and Innovations in Urban Infrastructure

- Germany has implemented strategies for a greener nation and has been quite successful as of now. By 2030, the nation is targeting 65% of its energy to be from renewables and aims to become carbon neutral by 2045.
- Manufacturers in the Germany elevator and escalator market are choosing advanced and environmentally friendly solutions to save sustainable energy. EOX model by TK Elevator is an example of how engineering has contributed to energy savings by up to 28% and KONE Ultrarope technology is another revolutionary technology as it has helped in a decrease of 31% of all consumed energy.
- The use of the combination of regeneration and advanced battery management systems such as Dazen's energy-efficient elevators enables technology as this allows to production of maximum energy at minimum cost and maximizes the renewal sourcing of the energy. This allows them to contribute significantly to cost savings and reduce their carbon footprint.

### Smart, Efficient, and Sustainable Elevator Innovations in The Germany Elevator and Escalator Market

- The Otis Smart Cab elevator introduces advanced in-cabin technologies to improve passenger experience. This model shows personalization and sensory engagement through features like customizable smell and smart image displays. It also promotes energy efficiency by dimming the lights and displays when they are not in use.
- The KONE High-Rise Minispace DX elevator introduces space optimization and construction efficiency innovation which includes compact design, simplified pit construction, and increased rentable space, to enhance efficiency and sustainability in buildings.

### Booming Investments in Public Transport & Real Estate

- Increasing expansion of both public and private infrastructure in Germany's residential and transportation sectors is one of the main factors boosting the Germany elevator and escalator market. The demand for vertical mobility solutions will likely increase in 2025 because of sustainable allotment for energy, residential, educational, and rail infrastructure, positioning the sector for continuous growth and innovation.
- The economy of Germany increased by 0.7% in November 2024. This indicates the industrial and commercial development, which will help the elevators and escalators sector beneficially.
- Elevators will be more in demand in multi-story complexes and high-rise residential structures because of the federal government's plan to modernize infrastructure and construct 400,000 new flats costing USD 625.65 billion in public investments in 2025.

### Rising Hotel Investments Supporting the Germany Elevator and Escalator Market Growth

- Germany's tourism just hit a milestone with 496.1 million overnight stays in 2024, which is up by 1.9% from last year. This rise is sparking a wave of new hotel constructions and supporting the Germany elevator and escalator market growth.
- Major hotel players like Premier Inn and Accor are ramping things up planning a bunch of new openings from 2025 to 2027, which means there is a growing need for modern elevators to keep up with the demand in the market.

## INDUSTRY RESTRAINTS

### Economic Uncertainty and Rising Costs Impacting Real Estate and Infrastructure Development

- The real estate market alongside infrastructure development has decelerated in early 2025 while construction prices continue to rise due to economic difficulties. Construction project delays and cancellations in the real estate sector became more frequent as

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property prices kept rising which reduced the market demand for vertical transportation solutions and hampered the Germany elevator and escalator market growth.

-□The number of new housing approvals has significantly decreased to 210,000 for 2024 according to forecasts, which represents a 45% downward shift from the previous annual figures. New elevator and escalator installations throughout the residential sector will decrease because of this expected decline.

-□Property developers face additional challenges due to the combination of increasing construction expenses with strict regulations along with resource constraints. Construction delays for commercial and residential buildings using elevators and escalators occurred because inflation caused labor and materials to become more expensive.

#### Regulatory Hurdles and Economic Strains Slowing Construction Growth in Germany

-□The current high interest rates coupled with complicated permit regulations prevent new investments from taking place while stopping residential and commercial construction developments.

-□The time required to gain approvals together with bureaucratic paperwork impedes the development process of new elevator and escalator projects. The number of approved apartments fell by 24.2% during 2024 which demonstrated decreased residential development in that year.

-□European data shows Germany stands among countries with the most expensive wages because of elevated tax rates together with heavy social security fees thereby elevating project expenditures. Germany faces a rising labor shortage that demands 400,000 more employees in 2025 making difficulties for the construction industry.

#### VENDOR LANDSCAPE

-□Mitsubishi Electric, Otis Elevator, TK Elevator, Schindler Group, Kone Corporation, FUJITEC, and KOHLER are the top manufacturers in the Germany elevator and escalator market.

-□Other prominent players in the Germany elevator and escalator market are Lutz Aufzüge, Kleemann Lifts, Cibes Lifts, Stannah Lifts Holding Ltd, Hiro Lifts, & others. These leading players continuously innovate to provide state-of-the-art technology, ensuring safety, efficiency, and sustainability.

#### Key Vendors

- Otis
- KONE
- TK Elevator
- Schindler
- Mitsubishi Electric
- Fujitec
- KOHLER

#### Other Prominent Vendors

- Lutz Aufzüge
- KLEEMANN
- Cibes Lift Group
- Stannah Lifts Holdings Ltd.
- HIRO LIFT
- Orona Group
- AKE Elevators and Escalators

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- []Vestner Aufzüge GmbH

#### KEY QUESTIONS ANSWERED:

- 1.[]How big is the Germany elevator and escalator market?
- 2.[]What are the key opportunities in the Germany elevator and escalator industry?
- 3.[]What are the key Germany elevator and escalator market players?
- 4.[]What is the number of installed bases in the Germany elevator and escalator market in 2024?
- 5.[]What will be the growth rate of the Germany elevator and escalator market?

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