

Brazil Construction Equipment Market Research Report 2025-2030

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Report description:

The Brazil construction equipment market size is expected to grow at a CAGR of 4.01% from 2024 to 2030.

KEY HIGHLIGHTS

- Earthmoving equipment accounted for the largest market share of the Brazil construction equipment market in 2024. Excavators in the earthmoving segment accounted for the largest share in 2024. The country's investment in developing its public infrastructure and increased utilization of excavators in the mining sector drive the Brazilian earthmoving market.
- On the other hand, demand for material handling equipment is also growing due to the booming manufacturing sector, driving the development of warehouses and logistics parks across the country.
- The forklifts and telescopic handler segment holds the largest share among material handling equipment in Brazil, driven by ongoing and upcoming warehouse developments. Electric forklifts dominate the market, representing the largest and fastest-growing segment. The shift toward electrification is being accelerated by the adoption of lithium-ion (Li-ion) battery technology, which offers faster charging times, longer operational lifespan, and lower total cost of ownership. Hangcha Brazil's XC series 4-5-ton new energy electric forklifts are increasingly popular across the country.
- The road construction equipment segment is estimated to reach around \$240 million by value by 2030, growing at a CAGR of 1.90%.
- Road rollers sales are high in Brazil in response to the rising renovation and expansion of transport networks.
- Sustainability represents an emerging but significant driver. In September 2025, Dynapac deployed the first fully electric asphalt road roller in Brazil—the CC 1000e model—on the Ayrton Senna/Carvalho Pinto Highway (SP-070) through a partnership with Ecopistas and Vero Construcao Civil. The equipment operates with zero CO₂ emissions, zero noise, and eliminates fuel and combustion engine maintenance costs, representing the first machine from Dynapac's Z.ERA sustainability program in operation in Brazil.
- In 2024, Brazil's Minister of Ports and Airports announced the first phase of the Universalization of Air Transport Programme to reduce airfares and operating costs in Brazil by 2024. Among the three main measures announced, the minister laid out the construction plan of 120 new airports in Brazil by 2026.

- Construction equipment utilization in the construction industry by end-user (volume) has the largest market share in 2024.
- Brazil's construction sector is expected to grow by 2.5% in real terms in 2025, driven by expansions in residential housing, industrial and energy projects, and an increase in construction employment. In the first quarter of 2025, the value added by construction rose by 3.4% year-on-year. Significant infrastructure funding includes BRL 80 billion (approximately \$14.8 billion) in credits approved by BNDES for ports, shipyards, and related projects.
- The construction equipment used in the mining industry is undergoing significant expansion, primarily due to the growing mining and mineral extraction activities of the country. Key construction equipment used in the mining sector, such as hydraulic excavators, wheel loaders, dump trucks, bulldozers, and motor graders are expected to witness significant sales with rising mining activity in the country.
- Nickel production surged 44% to 40,300 tons in Q2 2025 - the highest output since 2021 - benefiting from improved Canadian assets and the Onca Puma operation. Nickel stands as a critical mineral for EV batteries and grid energy storage, positioning Brazil as a cornerstone supplier.

BRAZIL CONSTRUCTION EQUIPMENT MARKET TRENDS

Growing Prominence of Mini Excavators in Brazil

- Mini excavators are becoming essential assets, valued for advanced features such as intelligent controls, low fuel consumption, zero-swing capabilities, and digital management interfaces. The market's drive toward versatility and sustainability is evident through the adoption of fuel-efficient engines, reduced emissions, and adaptability to diverse terrains and uses.
- Increased investments in construction and growth in small to medium projects are leading operators to favour equipment offering agility, fuel efficiency, and manoeuvrability.

Growing Demand for Skid-Steer Loaders

- Skid-steer loader industry outlook remains optimistic in 2025. The sector is advancing toward more sophisticated and efficient models, exemplified by innovations like the Bobcat T7X-the world's first fully electric compact track loader. This battery-driven loader offers higher productivity, instant torque, quieter operation, and greater power compared to traditional diesel models, all while producing zero carbon emissions.
- Market growth for these machines is rapid, as sectors increasingly seek compact, multipurpose equipment for varied uses. This expansion is accelerated by technological innovations and a push toward greater efficiency in construction, agriculture, and renovation activities.

BRAZIL CONSTRUCTION EQUIPMENT MARKET DRIVERS

Accelerating Infrastructure Development through Government-Funded Investment Programs

- The New Growth Acceleration Program (Novo PAC) remains the principal driver of market expansion. The Novo PAC is a Brazilian government initiative to address infrastructure bottlenecks and stimulate economic growth through investments in nine key areas: transportation, cities, healthcare, energy, education, water access, digital inclusion, social infrastructure, and defence industry innovation.
- Renewable energy development is another key growth area influencing equipment demand. Brazil is targeting to raise the share of renewables in its total energy mix from 16% in 2023 to 45% by 2030. The Brazilian Electricity Regulatory Agency (ANEEL) has initiated two major transmission auctions amounting to BRL 11.3 billion (\$2.09 billion) across 25 states in 2025.
- Housing sector demand further supports market growth. Brazil faces a housing deficit of 6-7 million homes, and the government's Minha Casa, Minha Vida program aims to build 2 million new housing units by 2026. Urbanization, population increases, and social housing initiatives are maintaining high levels of equipment utilization in residential and mixed-use construction.

Growing Utilization of Construction Equipment in the Mining Sector

- Brazil's mining industry commands substantial economic importance within the national economy, constituting approximately 4% of gross domestic product (as of 2023) while generating significant fiscal revenue.
- Recent sectoral growth has been substantially driven by opportunities associated with the global energy transition. Brazil has emerged as a significant location for strategic mineral projects encompassing nickel, copper, rare earth elements, and lithium-minerals essential for battery technologies and renewable energy infrastructure
- The intensified mining activity and associated capital investment directly stimulate demand for construction equipment throughout mining operations-spanning site preparation, exploration, extraction, processing, and material haulage functions.

INDUSTRY RESTRAINTS

Rental and Used Construction Equipment is Dominating the Market

Amid elevated machinery prices and ongoing economic uncertainties, equipment rental has become a more appealing option for many contractors. This shift presents new growth avenues for rental firms and equipment manufacturers, particularly those offering flexible lease agreements and creative financial solutions. The construction equipment rental market in Brazil is currently 2025 valued at approximately \$1.8 billion, highlighting its growing strategic importance.

Several factors have driven the preference for leasing over ownership, including high equipment prices, long delivery times, and the operational complexities of maintenance. Sobratema data reveal that the share of leasing in total machinery sales has doubled over the past decade, rising from 15% to 30%.

Housing Deficit in the Country

The nation's housing shortage continues to weigh heavily on construction activity. According to the Joao Pinheiro Foundation, Brazil faced a housing deficit of 5.98 million units at the end of 2023-equivalent to 7.6% of all occupied dwellings.

Escalating housing prices have added to the strain, limiting new residential starts and reducing utilization rates for construction machinery. Through September 2025, national housing prices rose 7.97% year-on-year, well above the inflation rate of about 5.3%. The average cost per square meter climbed to R\$9,375 (\$1,675), while secondary markets such as Salvador (20.63%), Joao Pessoa (18.25%), and Vitoria (17.09%) recorded even sharper increases.

High interest rates have further compounded the challenge. Brazil's benchmark Selic rate reached 15% in November 2025, sustaining intense pressure on mortgage availability and affordability.

BRAZIL CONSTRUCTION EQUIPMENT MARKET VENDOR LANDSCAPE

- Caterpillar, Komatsu, Volvo CE, Hitachi Construction Machinery, Liebherr, and XCMG are the front-runners in the country's construction equipment market. These companies have strong market share and offer a diverse set of equipment in the Brazil market.
- Tadano, Terex, Kobelco, Zoomlion, Wacker Neuson, Yanmar, Dynapac, and Toyota Material Handling are niche market players in the market. These companies offer low product diversification and have a strong presence in the Brazil market.
- SANY, Manitou, JCB, LiuGong, DEVELON, CNH Industrial N.V., John Deere, Bobcat and HD Hyundai Construction Equipment are emerging in the market. These companies are introducing new technologically advanced products to challenge the market share of market leaders in the Brazilian market.
- Ammann, JLG, BOMAG have low product diversification; these companies are lagging in adopting new technologies used in construction equipment.
- SOTREQ S.A. is one of South America's largest and most established Caterpillar equipment dealers, with over 80 years of

operational history serving Brazil's construction, mining, energy, and maritime industries.

- Hitachi Construction Machinery operates a joint venture with John Deere in Brazil called Deere-Hitachi Maquinas de Construcao do Brasil S.A., established in October 2011 with production commencing in September 2013.
- Vertical Equipamentos introduced Brazil's first Liebherr LTC 1050-3.1 compact crane to the market. The 3-axle crane, designed for restricted working environments with a maximum lifting height of 48 metres and 50-tonne load capacity, is being deployed in refineries and petrochemical plants.
- In 2019, JCB announced a \$25 million investment in its Brazilian operations, signalling its ongoing commitment to market expansion and product development for Brazil and neighbouring South American markets.

Key Vendors

- Caterpillar
- Komatsu
- Volvo Construction Equipment
- Hitachi Construction Machinery
- Liebherr
- SANY
- Xuzhou Construction Machinery Group (XCMG)
- JCB
- Zoomlion
- HD Hyundai Construction Equipment

Other Prominent Vendors

- Kobelco
- Liugong Machinery Co., Ltd.
- CNH Industrial N.V.
- Toyota Material Handling International (TMHI)
- DEVELON
- Tadano
- Terex Corporation
- Manitou
- BOMAG GmbH
- Bobcat
- JLG Industries
- John Deere
- Yanmar Holdings Co., Ltd.
- Ammann
- Dynapac
- Wacker Neuson

Distributor Profiles

- Noroeste Maquinas e Equipamentos LTDA
- FW Maquinas
- Mason Equipment
- Engepecas Equipamentos Ltda

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Segmentation by Type

- Earthmoving Equipment
 - Excavator
 - Backhoe Loaders
 - Wheeled Loaders
 - Other Earthmoving Equipment (Other loaders, Bulldozers, Trenchers, Motor Graders)
- Road Construction Equipment
 - Road Rollers
 - Asphalt Pavers
- Material Handling Equipment
 - Crane
 - Forklift & Telescopic Handlers
 - Aerial Platforms (Articulated Boom Lifts, Telescopic Boom lifts, Scissor lifts)
- Other Construction Equipment
 - Dumper
 - Concrete Mixer
 - 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)

KEY QUESTIONS ANSWERED:

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

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