Australia Construction Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 180 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Australia Construction Machinery Market Analysis

The Australian Construction Machinery Market was valued at USD 3.45 billion in 2025 and estimated to grow from USD 3.61 billion in 2026 to reach USD 4.5 billion by 2031, at a CAGR of 4.52% during the forecast period (2026-2031). Vigorous mining activity and a multi-billion-dollar public infrastructure pipeline underpin the growth trajectory, while digitalization, autonomous technology, and low-emission equipment accelerate replacement demand. Persistent labor shortages heighten interest in automation and rental models, and a smoother supply of critical components stabilizes delivery schedules. Meanwhile, emissions compliance and evolving safety rules spur rapid upgrades, encouraging original equipment manufacturers (OEMs) to localize service and assembly. Competitive intensity remains moderate because global leaders differentiate through technology partnerships, telematics offerings, and robust parts support rather than aggressive price cuts.

Australia Construction Machinery Market Trends and Insights

Government Infrastructure Pipeline 2025-2030

A planned Tasmania works program, Snowy 2.0 hydro expansion, and HMAS Stirling naval upgrade provide multi-year visibility for earthmoving, cranes, and material handling fleets. Tier-one contractors reserve equipment capacity well ahead of ground-breaking, smoothing quarterly order flow for OEMs. Project staging across states mitigates regional downturn risk and spreads parts demand, while public procurement clauses mandating lower emissions accelerate fleet renewal. Rental leaders ramp up inventory to capture short-term peaks, and telematics data from long-cycle projects improves predictive maintenance accuracy, reducing unscheduled stoppages on remote sites.

Mining Super-Cycle Revival (Iron-Ore, Lithium)

Western Australia is strengthening its position as a global mining hub by increasing iron ore production and expanding lithium operations to support the battery supply chain. Investments in advanced technologies, such as BHP's Western Ridge project and Roy Hill's haul truck automation, highlight the region's focus on tech-driven mining. Despite anticipated declines in iron ore prices, operators are upgrading equipment to ensure safety and performance, reflecting confidence in the resource sector. Based on offtake agreements with battery makers, lithium greenfields adopt battery-electric excavators earlier to meet environmental, social, and governance goals. OEMs bundle autonomy software, tele-ops cabins, and lifecycle service contracts, lifting average selling prices.

Cyclical Commodity & Construction Spending Swings

Falling iron ore and coal prices tighten mining capital budgets and delay equipment expansion, especially among mid-tier operators. High interest rates restrain commercial real-estate launches, dampening crane and earthmoving orders in city cores. Pipeline certainty offsets headline volatility, yet procurement committees stagger deliveries to conserve cash flow. Rental utilization dips in line with housing approvals, prompting fleet redeployment across states. Nonetheless, mandatory maintenance and safety overhauls sustain a demand for parts at a base level.

Other drivers and restraints analyzed in the detailed report include:

Growth of Rental & Leasing PlatformsPush for Low-Emission / Electric MachineryStringent Emission & Safety Compliance Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Material Handling captured 47.20% of the Australian construction machinery market share in 2025, as mega-projects demand continuous bulk movement. Mining Support is projected to outpace all other applications at a 4.62% CAGR, reflecting autonomous haulage growth and lithium mine expansions. Earthmoving maintains relevance with steady orders for road base and tunnel spoil removal. Transportation / Haulage benefits from intermodal terminal construction, while Demolition & Recycling gains momentum through strict waste-reduction targets.

Material Handling's prominence stems from port upgrades, logistics warehouses, and modular building yards that rely on cranes, forklifts, and conveyors. Australia's construction machinery market size for Mining Support is forecast to climb alongside BHP's Western Ridge and Roy Hill's ongoing fleet renewals. Digital twin models allow contractors to optimize cycle times, lowering fuel cost per ton moved. Rental houses expand high-capacity telehandler fleets to serve prefab builders. Meanwhile, real-time payload monitoring reduces overloading incidents, cutting maintenance costs and emissions.

Crawler Dozers controlled 42.30% of Australia's construction machinery market size 2025, leveraged by bulk earthmoving on rail, road, and mine sites. Hydraulic Excavators are forecast to record a 4.66% CAGR through 2031, propelled by versatility and autonomous retrofit kits. Wheel Loaders and Articulated Dump Trucks fill load-and-haul gaps, whereas Tower and mobile Cranes remain indispensable for bridges and high-rise cores.

Australia's construction machinery market benefits as excavators integrate grade control and 3D machine guidance, cutting rework by half. Contractors favor 20-35 ton classes that can swap between buckets, hammers, and couplers in minutes. Dozers retain importance on remote mine haul roads where traction and blade capacity trump agility. Telematics software now pushes fuel burn and idle alerts to site supervisors, driving operational discipline. Despite automation advances, XCMG's GR3505 grader launch underlines continuing demand for precision finishing.

The Australia Construction Machinery Report is Segmented by Application (Material Handling, Earthmoving, and More), Machinery Type (Hydraulic Excavators, Wheel Loaders, and More), Propulsion Type (Diesel, Hybrid, and More), and End-User Industry (Construction & Infrastructure, Mining & Quarrying, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

List of Companies Covered in this Report:

Caterpillar Inc. Komatsu Ltd. Hitachi Construction Machinery Co. Ltd. Volvo Construction Equipment John Deere & Co. JCB Construction Equipment Australia CNH Industrial (NHCE) Australia Doosan Bobcat Oceania Liebherr-Australia Pty Ltd. SANY Oceania XCMG Australia Yanmar Construction Equipment Co. Ltd. Kobelco Construction Machinery Co. Ltd. Wacker Neuson Group Sumitomo Construction Machinery Kubota Australia Hyundai Construction Equipment Australia Terex Corporation LiuGong Machinery Australia Sandvik Mining & Rock Technology

Additional Benefits:

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

Table of Contents:

Australia Construction Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 180 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-28

Signature

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com