

## **Saudi Arabia Construction Equipment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 190 pages | Mordor Intelligence

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### **Report description:**

Saudi Arabia Construction Equipment Market Analysis

The Saudi Arabia construction equipment market is expected to grow from USD 1.78 billion in 2025 to USD 1.89 billion in 2026 and is forecast to reach USD 2.55 billion by 2031 at 6.2% CAGR over 2026-2031. The expansion is powered by the USD 1.5 trillion Vision 2030 giga-project pipeline, rental-driven fleet optimization, and accelerating demand for earth-moving machines fitted with telematics. Equipment localization incentives, mandatory AI-based safety features in public tenders, and draft Tier-4f emission norms add structural tailwinds. Meanwhile, volatile steel prices, a skilled operator shortage, and grid limitations for on-site charging place measurable, yet manageable, constraints on market velocity. Competitive intensity is rising as Chinese manufacturers gain share through pricing, and global OEMs form Saudi joint ventures to satisfy local-content rules, all of which reshape service models and technology roadmaps in the Saudi Arabia construction equipment market.

Saudi Arabia Construction Equipment Market Trends and Insights

Vision-2030 Giga-Project Pipeline Worth USD 1.5 Trillion

The pipeline of mega-developments such as NEOM, the Red Sea Project, Diriyah Gate, and Qiddiya is recalibrating demand toward high-capacity excavators, autonomous bulldozers, and specialized tunneling rigs. NEOM alone is investing heavily for robotic construction systems, compelling OEMs to integrate AI telematics and remote operation modules into Saudi Arabia construction equipment market offerings. Contractors prefer long-term rental agreements because equipment life cycles trail the multi-decade

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project timelines, lowering balance-sheet stress while meeting rapid technology refresh needs. Government bond issuances and sovereign wealth fund spending smooth cash-flow visibility, providing contractors with financing certainty that reinforces equipment procurement planning.

#### Earth-Moving Demand for NEOM/Red Sea

NEOM's 26,500 km<sup>2</sup> desert terrain requires continuous grading, cut-and-fill operations, and large-scale soil stabilization, driving 24/7 deployment of crawler excavators, articulated dump trucks, and motor graders. Coastal elements of the Red Sea Project call for amphibious excavators and low-vibration piling rigs to protect coral ecosystems. Sustainability clauses built into both projects favor diesel-electric hybrids and battery-powered compact loaders, catalyzing power-source diversification in the Saudi Arabia construction equipment market. Remote locations elevate the value of predictive maintenance software and on-site parts stock, differentiating OEMs with robust service footprints.

#### Volatile Steel and Freight Prices

Surging global steel benchmarks raise manufacturing costs for excavator booms, crane masts, and chassis frames. Though new Saudi steel capacity aims to inject supply stability, rapid infrastructure demand keeps domestic prices elevated, compelling OEMs to implement quarterly price surcharges. Ocean-freight spikes tied to Red Sea security disruptions layer further cost pressure, nudging buyers toward localized assembly where shipping exposure is limited. Higher acquisition costs speed up the shift to rental contracts, as contractors offload price risk onto fleet owners.

Other drivers and restraints analyzed in the detailed report include:

Rental Preference to Cut Capex and Labor Costs  
Local-Content Rules Driving OEM Localization  
Skilled Operator Shortage

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

#### Segment Analysis

Earth-moving equipment captured 46.35% of Saudi Arabia construction equipment market share in 2025, underscoring its indispensability to desert grading, megacity foundation work, and logistics-corridor construction. Excavators top the growth chart at 8.30% CAGR, empowered by Vision 2030 backlogs that demand high-cycle duty across multiple simultaneous giga-sites. Bulldozers and graders benefit from multi-lane highway projects that interconnect Riyadh, NEOM, and Red Sea corridors, while crawler cranes sustain mid-single-digit growth on the back of vertical mixed-use towers. Concrete pumps and mixers remain essential for residential output bursts, whereas aerial work platforms stake relevance amid stricter worker-safety codes in urban settings.

The machinery mix is trending toward specialized sub-categories. Tunnel borers find niche acceleration in Riyadh Metro extensions, and stone crushers anchor aggregate self-sufficiency drives in Tabuk Province. High-capacity material-handling trucks serve port modernizations at King Abdullah Port, feeding export supply chains. Precision drilling rigs align with renewable-energy park installations, while compact backhoe loaders service urban infill projects. The broader Saudi Arabia construction equipment market therefore demands product diversity, pushing OEMs to widen portfolios and engage in selective local assembly of high-volume models.

Diesel engines sustained a wide 78.95% share of the Saudi Arabia construction equipment market in 2025, owing to their high power density and ubiquitous service infrastructure. Yet battery-electric units clock a 20.10% CAGR to 2031, supported by sustainability mandates at giga-projects and falling lithium-ion pack costs. Interim hybrid platforms grow in step with Tier-4f

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emissions compliance, blending fuel savings with dependable refueling logistics.

Grid constraints at remote Western and Northern job sites complicate rapid electrification, but developers are piloting solar-plus-storage microgrids to solve charging bottlenecks. Hydrogen fuel-cell prototypes are undergoing field trials tied to the Kingdom's green-hydrogen export ambitions. Diesel OEMs defend market share via telematics-based fuel-efficiency upgrades, while rental companies hedge with blended fleets that meet current diesel demand and emergent electric requirements within the Saudi Arabia construction equipment market.

The Saudi Arabia Construction Equipment Market Report is Segmented by Machinery Type (Cranes, Earth-Moving Equipment, Material Handling Equipment, Bulldozers, Dump Trucks, and More), Power Source (Diesel, Hybrid, and More), Sector Type (Building, Infrastructure, Energy, and More), Power Output (Below 100 HP, 101 To 200 HP, and More), and Region. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

List of Companies Covered in this Report:

Caterpillar Inc. Komatsu Ltd. Volvo Construction Equipment Hitachi Construction Machinery XCMG Group CNH Industrial (Case, New Holland) Doosan DEVELON Liebherr-International AG JCB Sany Heavy Industry Tadano Ltd. Manitowoc Co. Hyundai Construction Equipment Bobcat Co. Kobelco Construction Machinery Zoomlion Heavy Industry Science & Technology Co Zahid Tractor and H.M. Co. Ltd. Bin Quraya Rental Heavy Machinery Center (HMC) Al-Futtaim Auto and Machinery (FAMCO)

Additional Benefits:

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

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