



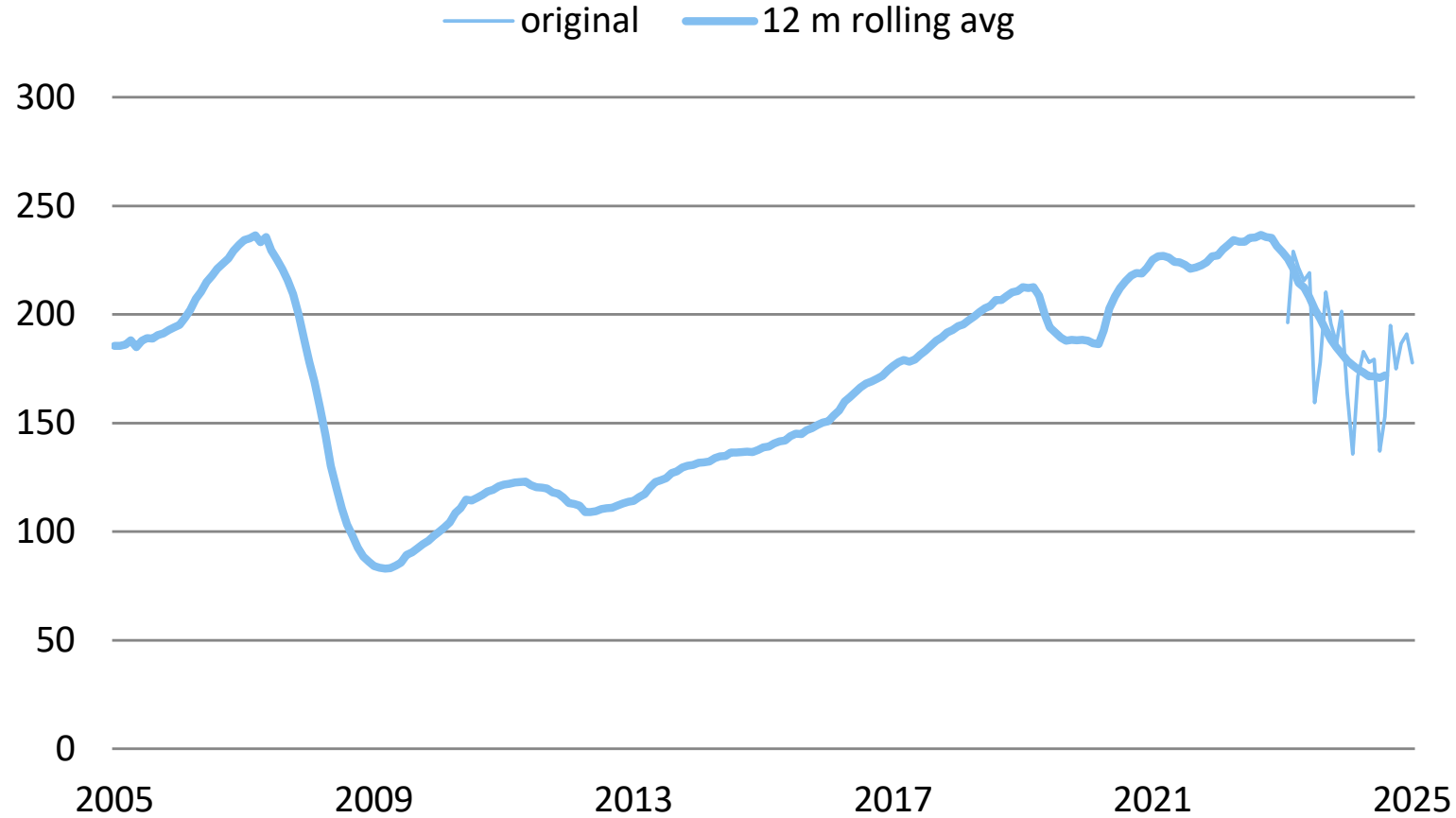
Sebastian Popp
CECE Economic
Affairs Manager

**The European construction
equipment market in
the first half of 2025**

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European market is past its trough

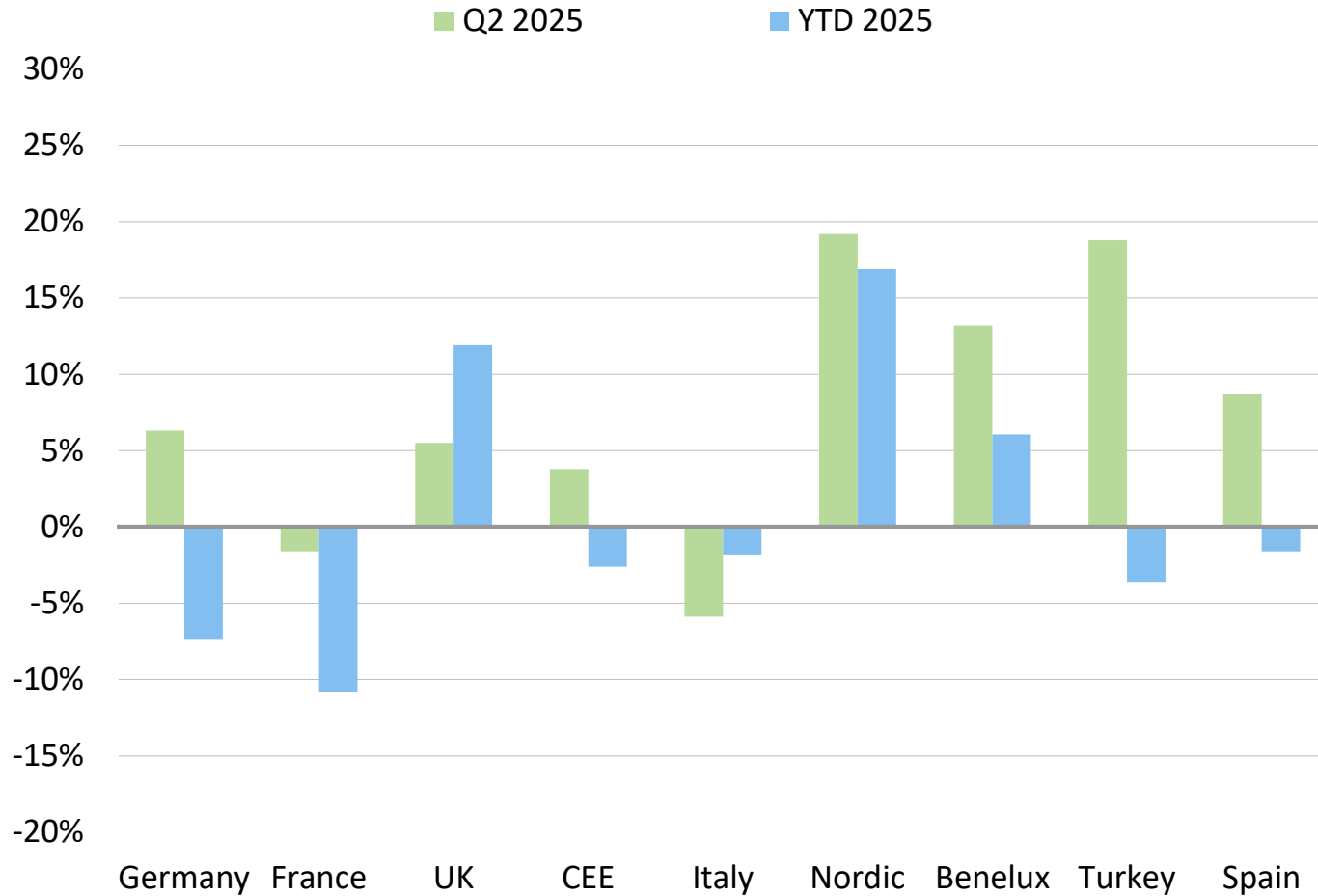
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monthly earthmoving equipment sales in Europe, last data point: July 2025, index 2010 = 100

Sales in Europe down by 1.1% in H1

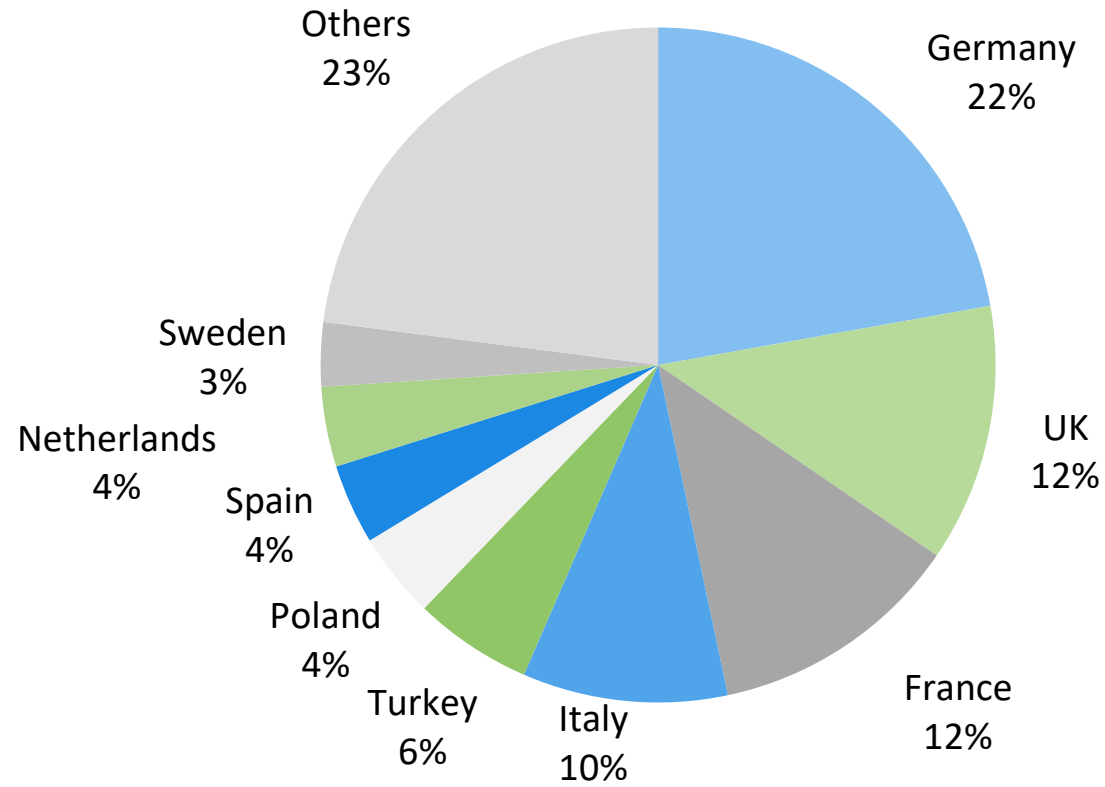
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construction equipment sales on the European market Jan-June 2025 compared to previous year in %

Share of top 3 markets has come down

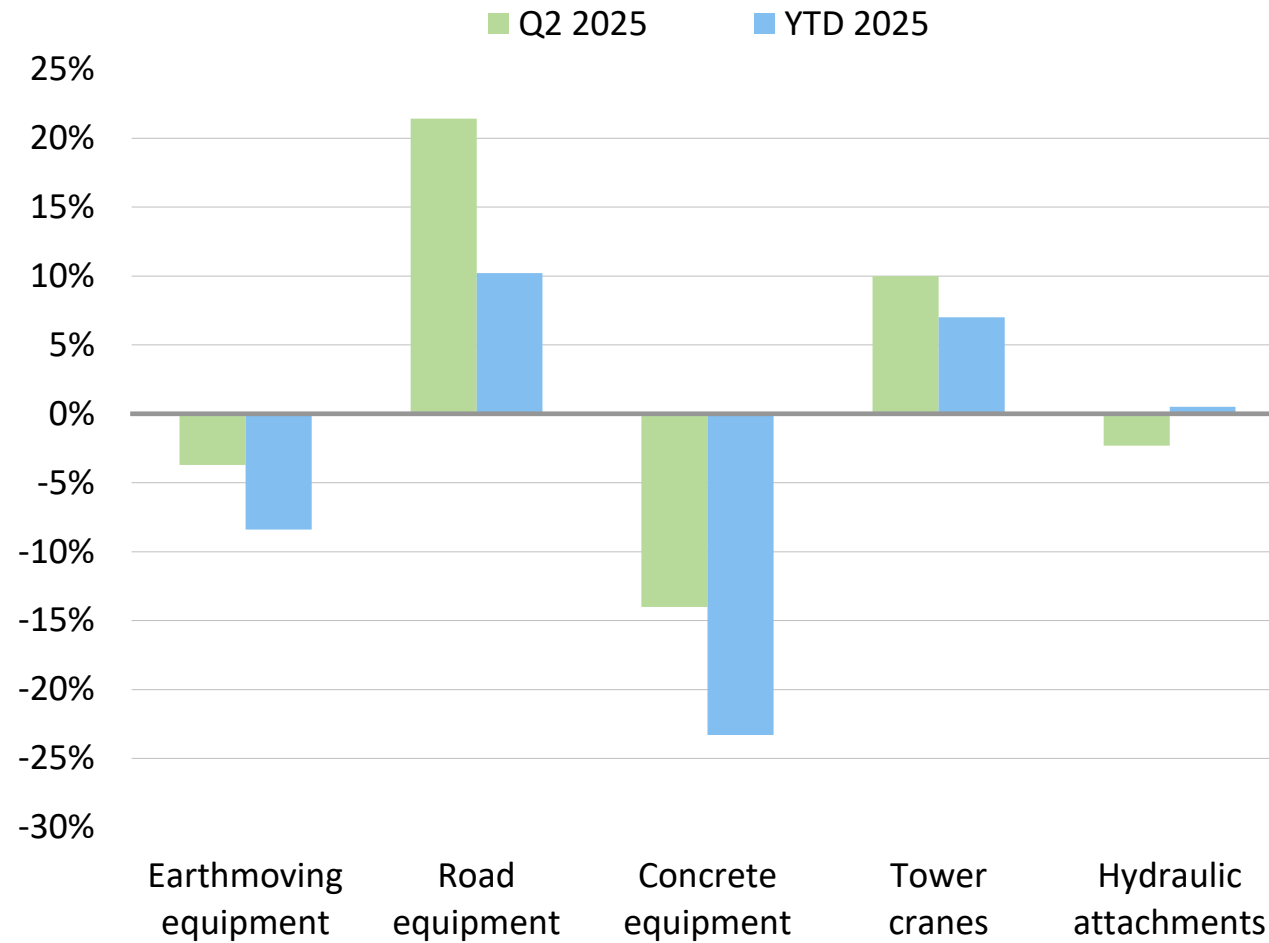
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shares of construction equipment sales in European countries, Jan-June 2025

Road machinery with strong momentum

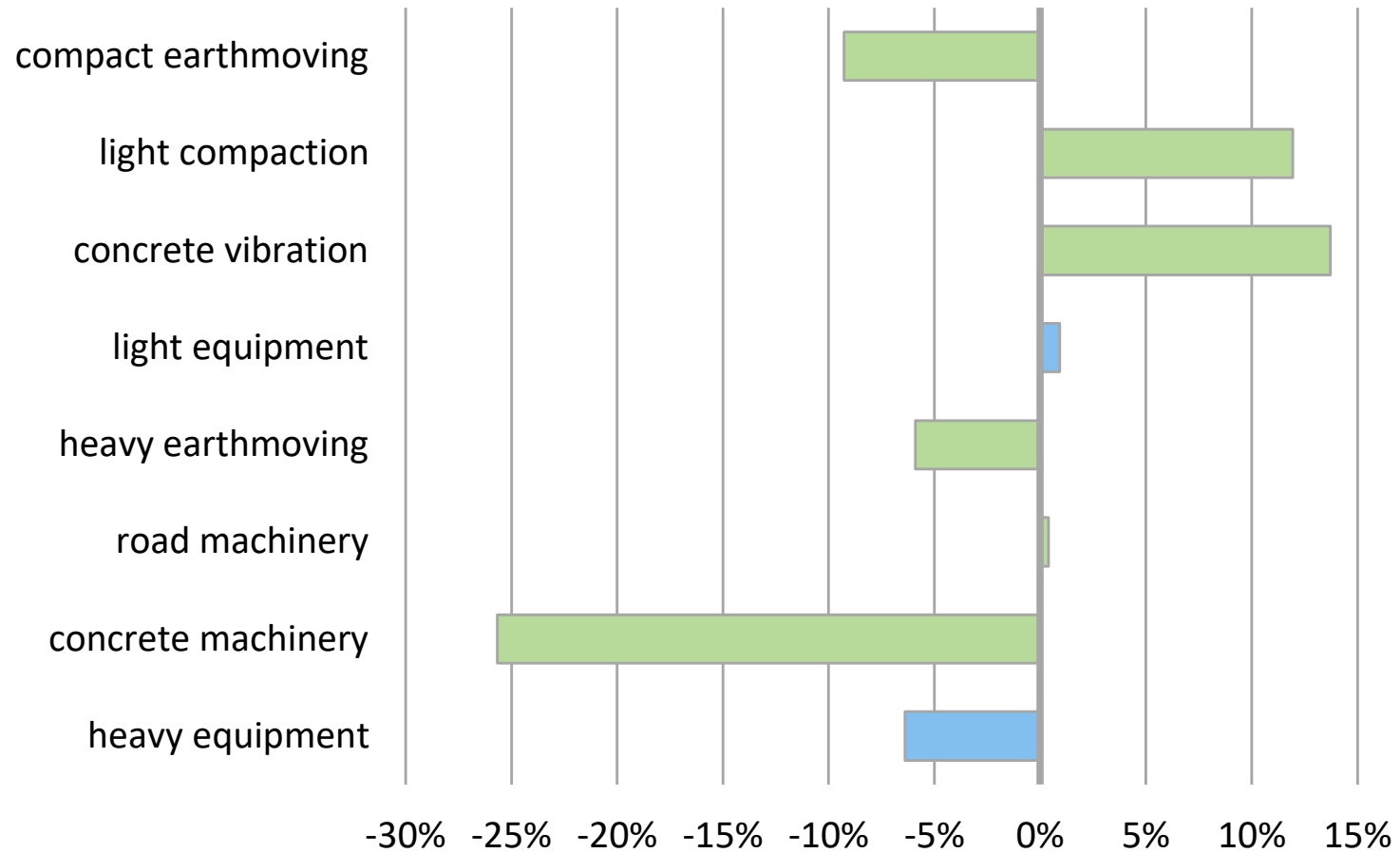
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construction equipment sales on the European market Jan-June 2025 compared to previous year in %

Light equipment is the growth driver

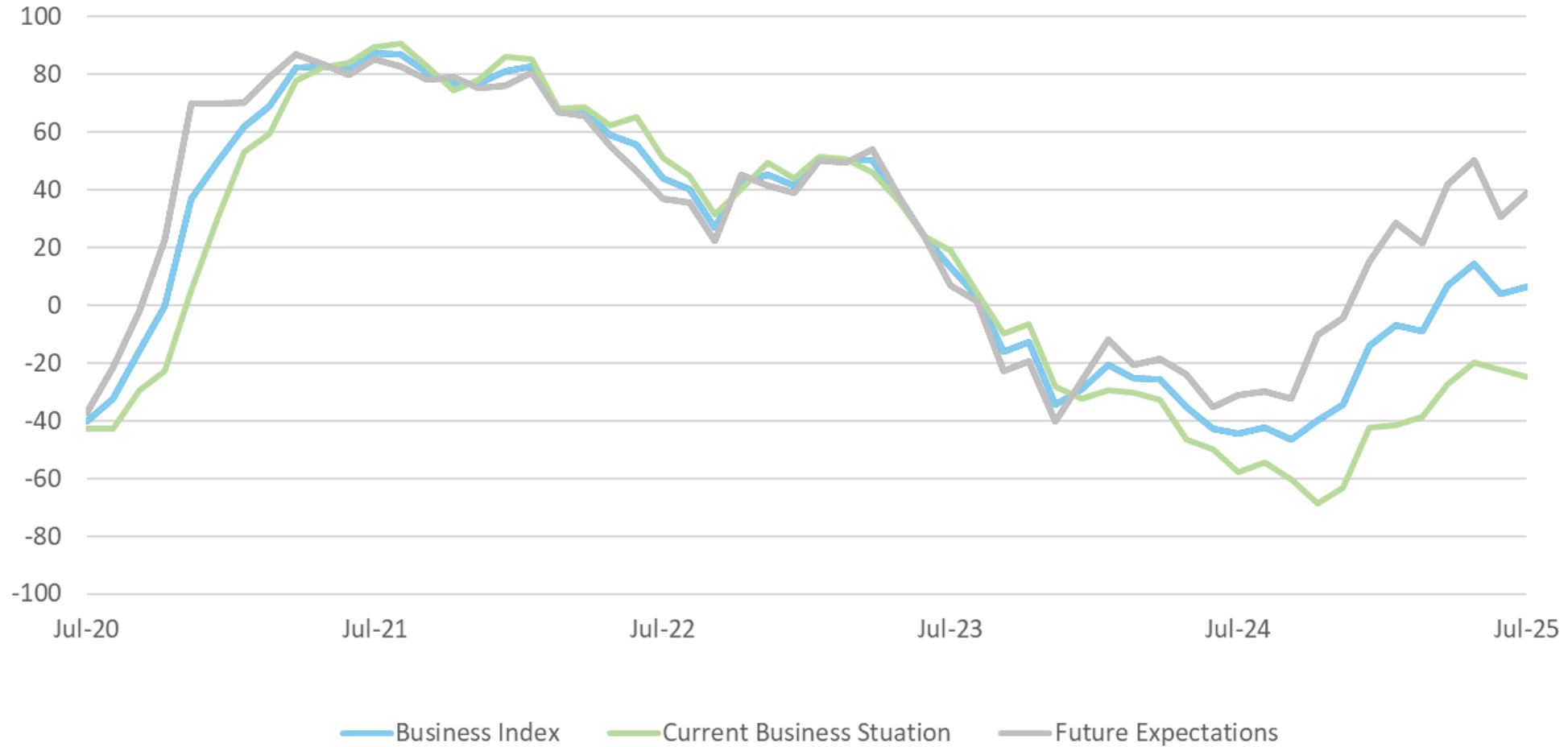
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construction equipment sales on the European market Jan-June 2025 compared to previous year in %

Gradual rise in business climate

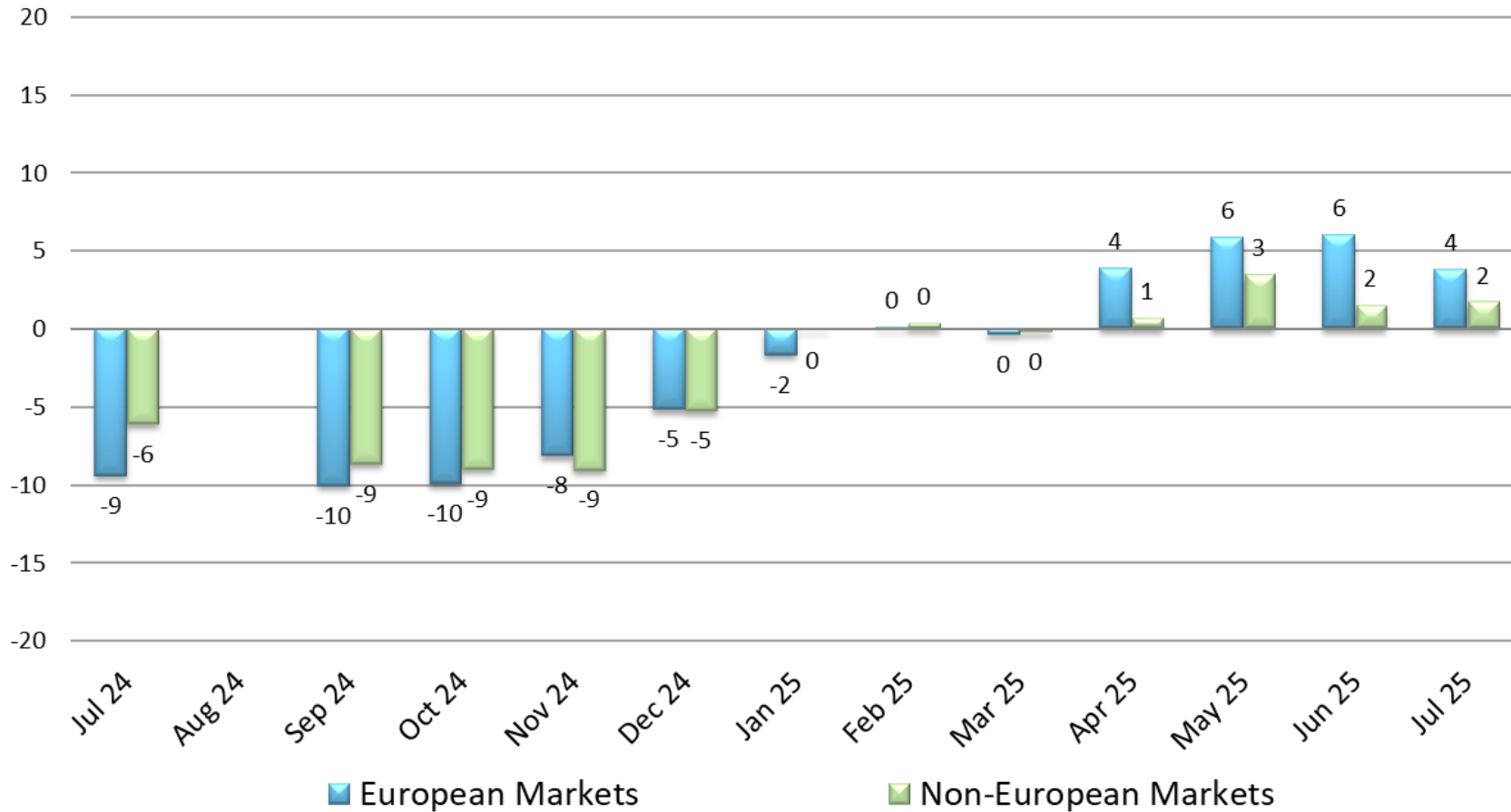
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source: CECE Business Barometer, July 2025

Is the new orders growth sustainable?

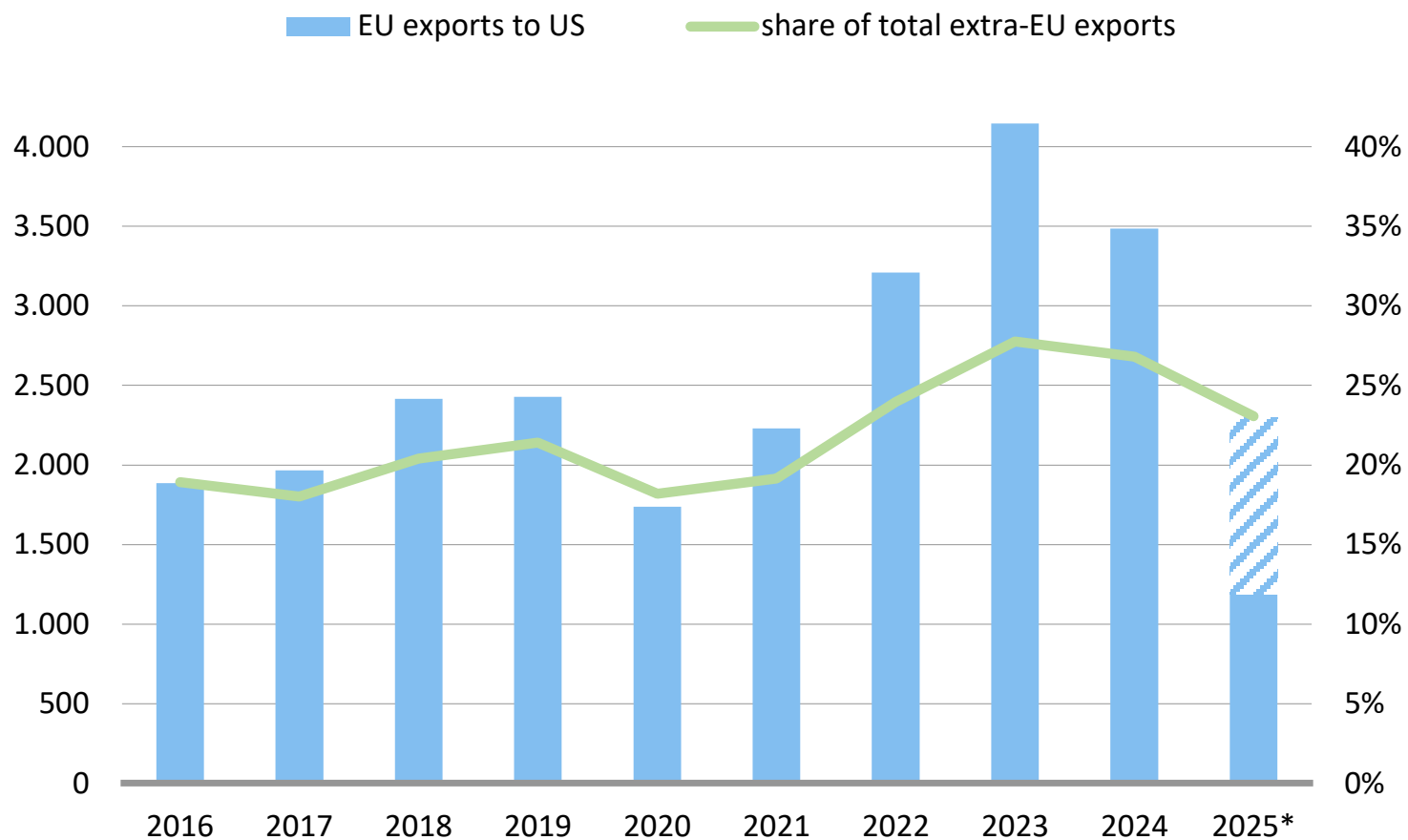
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incoming orders past month compared to one year ago, balance of positive and negative replies, source: CECE Business Barometer, July 2025

YTD EU exports to US down by 34%

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construction equipment exports in EUR million, *=Jan-May 2025 data and projection, source: national statistics bureaus

- European market:
 - Second quarter brought a long-anticipated upturn, but it is difficult to quantify how much of this was due to the temporary “bauma effect”
 - New orders are recovering but don’t take off to strong growth
 - Short-term construction industry outlook is still restrained
 - 5% sales growth for total 2025 seems realistic
- Global markets:
 - US tariffs currently overshadow almost all industry trends
 - Geopolitical crises continue to be a significant threat
 - No sustainable recovery of the Chinese market, competitive pressure from Chinese manufacturers on international markets to become even fiercer
 - India, Middle East, Latin America with a positive outlook
 - US market with substantial declines
 - Global equipment sales in 2025 likely to decline by 5%



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**Thank you
very much!**

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