

REPORT OF ACTIVITIES 2017

Message from the President

CECE at the technological forefront



Bernd Holz, CECE President 2016 - 2017

“

After my first year as President of CECE, the European trade association representing the 13 national construction equipment associations in Europe, I would like to remind you how important our industry is: CECE represents more than 350 machinery OEMs, with over 500 brands and we have a collective turnover of 35 to 40 billion Euros in our European businesses. The industry structure is a “low-volume – high-complexity”, which makes it more difficult for all of them to implement new regulations.

Our industry employs a direct workforce of 150,000 people in Europe – and indirectly 2 to 3 times more. Over 85% of our production capacity is in Europe, with over half of OEMs producing exclusively

in Europe. Over 40% of the revenues are collected in continents outside of Europe – and over half of the revenue comes from mid-sized companies. Therefore, we are a true asset to the European economy.

CECE priorities include the completion of the new engine exhaust emissions legislation in all its technical details, as well as activities in the fields of outdoor noise regulation and machine safety standards, including the drafting of a new standard for machine visibility. Furthermore, CECE carries on its work to further strengthen the profile of the European construction equipment sector, reinforcing its communication towards EU policy makers and other stakeholders by describing and promoting the importance of the sector for the European economy.

An item of significance the coming year will be the issue of skills development and the availability of future engineers. Our sector needs well-skilled young professionals to conceive, design, manufacture and maintain the machines of tomorrow. CECE members and manufacturers already undertake several activities at national level to illustrate the attractiveness of developing a career in the construction machinery and equipment industry. We will continue our efforts to put these initiatives in the spotlight and add a European dimension where relevant.

The sector has used the last decade to make its production leaner and sustain their strength amongst the global competition. Now, we are shifting from selling just steel and hydraulics to offering

more all-integrated services to support customers in executing their work. Therefore, many companies are planning to increase their spending on R&D to remain on the technological forefront.

The most important technology trend for our sector in the coming years, beside emissions technology, will be the advancement of telematics. Telematics and remote-monitoring are closely linked to better serving our customers.

Our industry should be ready for the rapidly up and coming era of “digitisation”. The key to success for OEMs will be how quickly they are able to change and implement these advancements into their strategy and transform their business models, becoming more service- and customer-oriented than ever before.

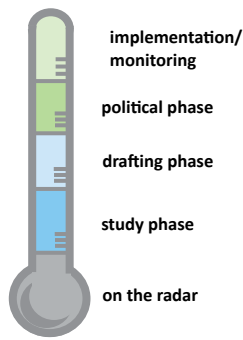
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TOPIC-O-METER



Environment

| | 2016 | 2017 | 2018 |
|---------------------------|-------------|-------------|-------------|
| Air quality | Green | Green | Light Green |
| CO ₂ emissions | Grey | Grey | Grey |
| Noise | Light Blue | Light Blue | Green |
| Circular economy | Green | Green | Light Green |
| Chemicals | Light Green | Light Green | Light Green |

Market access

| | 2016 | 2017 | 2018 |
|--------------------------------|------------|-------------|-------------|
| Economic & industrial policy | Light Blue | Light Green | Light Green |
| Standardisation policy | Light Blue | Light Green | Light Green |
| Trade issues & internal market | Light Blue | Light Blue | Green |
| Digitalisation | Grey | Blue | Blue |

Safety

| | 2016 | 2017 | 2018 |
|---------------------|------------|--------------------------------|--------------|
| Visibility | Green | Green | White with X |
| Road circulation | Light Blue | Light Blue with Green Triangle | Light Blue |
| Machinery Directive | Light Blue | Green | Light Green |

CECE MISSION

CECE is the recognized organisation representing and promoting the European construction equipment sector and related industries towards the European Institutions and other organisations worldwide.

CECE coordinates the views of its members (National Associations) and their members (construction equipment manufacturers) with the aim of achieving a fair and competitive regulatory environment via harmonised standards and other relevant policy means.

CECE monitors up and coming European legislation, formalises the industry position on specific subjects and actively communicates the views and interests of the sector to legislators. CECE is the established source of factual and technical information on the European construction equipment sector and its overall contribution to society.

CECE functions as a European network organisation with a secretariat in Brussels and regularly involves the staff and expertise of the national associations as well as company representatives. This approach facilitates an informed dialogue with the

European Institutions as well as facilitating the timely input from across the industry, where members are often small and medium-sized companies, as well as global players.

CECE organises the collection of a number of European market statistics exchanges for many types of construction equipment, and regularly polls the sector on the business climate. CECE also participates in a worldwide statistical exchange.

CECE represents the European industry within a network of the worldwide associations for the construction equipment industry, in particular the associations from China, Japan, Korea and North-America.

CECE cooperates with a limited number of leading global and international trade exhibitions that meet the demands of the construction equipment industry. By providing information about exhibitions, CECE helps smaller manufacturers to identify relevant trade fairs to promote their products in non-European countries.



CECE is an association of associations

The daily tasks of the Committee for European Construction Equipment (CECE) are managed by the CECE office in Brussels, consisting of two technical policy officers, supporting staff for administration and communications and the secretary general.

The team's work is supported and supervised by the Executive Committee, composed of the managing directors of the thirteen national construction equipment associations that are the members of CECE. The Executive Committee meets four to five times each year.

Twice a year, the CECE Steering Group gathers together the presidents of the national member associations, who discuss the CECE work programme, review the organisation's achievements, set priorities and approve the work of the Executive Committee and CECE office.

The Steering Group is chaired by the CECE president, seconded by a first and

second vice president, each of whom is elected for 2 years. The president is also the leading CECE representative in external relations, supported by the secretary general. The organisation is completed by a General Assembly, who approves the budget and accounts, and settles statutory issues.

AN ASSOCIATION OF ASSOCIATIONS

The work of CECE is organised by different topics as well as products. The work on topics is handled by Commissions supported by dedicated Project Teams for specific tasks. Topics relevant for a particular range of products are handled via Product Groups. The organisation and proper functioning of the Commissions, Teams and Groups, as well as the timely interaction and consultation between them, is initiated and coordinated by the CECE office.

To deal with the large amount of technical and regulatory issues, two Commissions and several Project Teams have been established. The High-Level Technical Policy Advisory Group (HLTPAG) consists of CTOs of companies with a strong interest in European topics, nominated by the national member associations. This group advises CECE with regard to strategic positioning, sector priorities and industry positions on technical and environmental subjects. The group's members support the advocacy work of CECE through speaking engagements or participation in meetings with policy makers.

The Technical Commission (TC) brings together a wide variety of technical experts from national associations and companies. They review the work of the Project Teams (PTs) and discuss technical topics not covered by a specific PT. The TC is also a platform to inform non-PT members about the ongoing work.

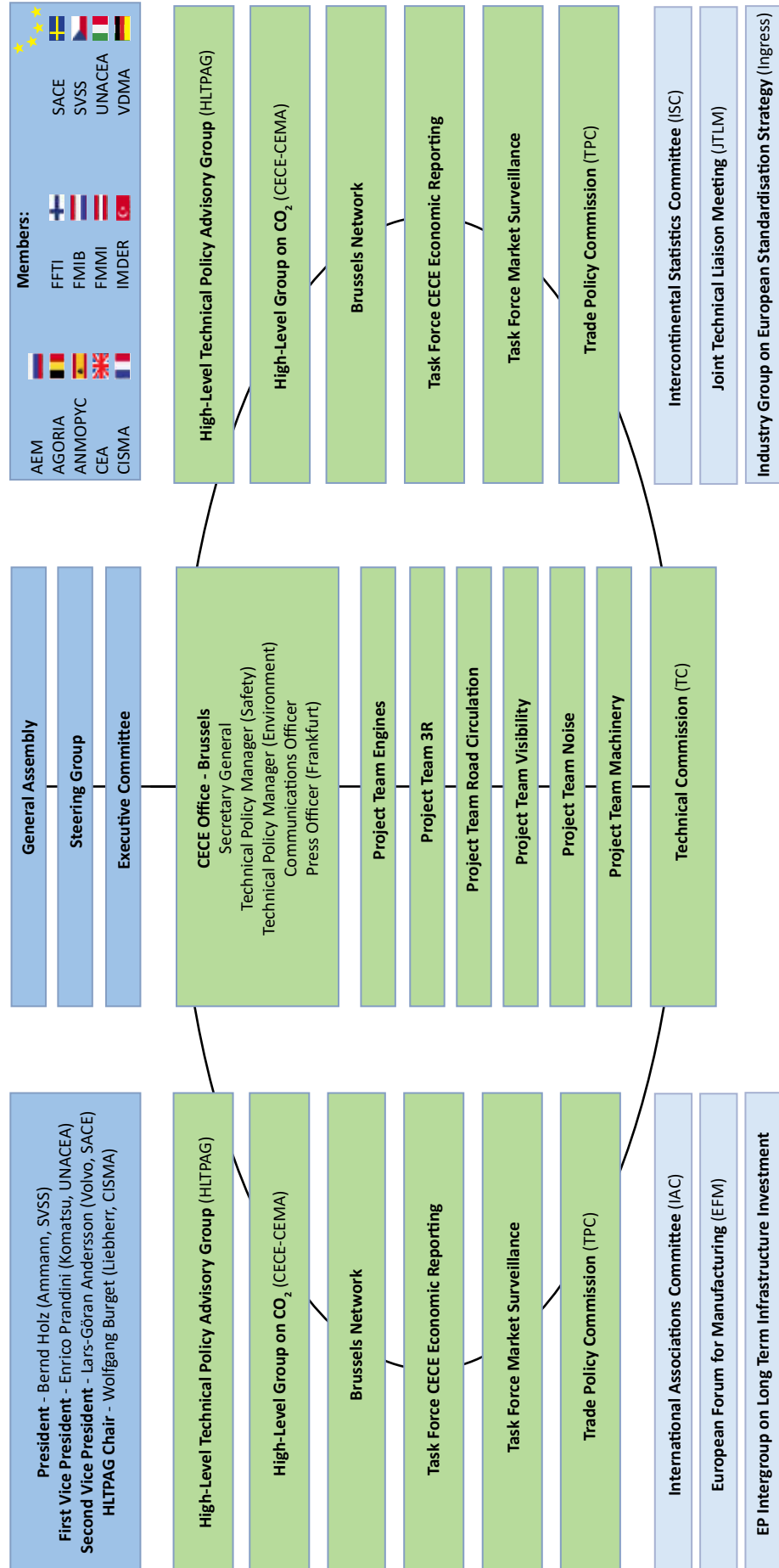
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| Steering Group | | | Executive Committee | |
|---|---|---|------------------------------|---|
|  |  |  | Asker Nakhushev |  |
| President Bernd Holz, Ammann (SVSS) | 1st Vice President Enrico Prandini, Komatsu (UNACEA) | 2nd Vice President Lars-Göran Andersson, Volvo (SACE) | Nathalie Nicolas |  |
| Andrey Komov , Volvo | | | Jorge Cuartero Dastis |  |
| Bruno Labie , Caterpillar | | | Rob Oliver |  |
| Jordi Perramon , AUSA | | | Renaud Buronfosse |  |
| Nick Ground , GKD Technik | | | Matti Leivo |  |
| Henri Marchetta , Mecalac | | | Paul Burger |  |
| Jukka Ylänen , Geomachine | | | Barbara Schicker |  |
| Paul Burger , Hitachi | | | Oğuz Yusuf Yiğit |  |
| Ulrich Hammerle , Liebherr | | | Pavel Urban |  |
| Tamer Öztoyggar , HMF-Hyundai | | | Calle Beckvid |  |
| Johann Sailer , Geda-Dechentreiter | | | Luca Nutarelli |  |
| | | | Joachim Schmid |  |
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ORGANISATION CHART





Continued from p. 3

CECE is an association of associations

The Trade Policy Commission (TPC) of CECE focuses on international trade, economic policy and internal market issues, including market surveillance, intellectual property rights and counterfeiting.

For advice and support for the CECE advocacy strategy, CECE regularly calls on the company representatives that are working in the EU capital,

the Brussels Network.

Product Groups (PG) consist of industry representatives that manufacture the same type of equipment. They meet to exchange information - in accordance with European regulations and laws on competition - and to promote technical and economic co-operation.

CECE's Statistical Commission (SC) brings

together statistical and market experts from member associations and companies in order to optimise the statistical service of CECE. The representatives of the Statistical Commission together with representatives of the sister associations from Japan, Korean and North-America form the Intercontinental Statistical Committee (ISC), which takes care of the worldwide statistical systems for the construction equipment industry.



High-Level Technical Policy Advisory Group

Strategic advisory and advocacy role for relevant technical topics

Chair: Dr Wolfgang Burget, Liebherr-EMtec

Secretary: Stephan Belaen, CECE

Number of experts: 18 CEOs and CTOs

Highlight in 2016: Meeting the Commission on the practical application of the exhaust emissions regulation and having a dialogue on the announced study related to retrofitting. The Group advised CECE on the Low Emission Zones and the need for worldwide harmonization of emissions, and acceptance of certification worldwide.

Priority for 2017: Focus on the challenges and opportunities that the increasing digitization will bring for CECE - industry.

Quote from the chair: "The digitization picture is very broad and a structured approach is needed for CECE. The needs of OEMs, fleet management, technologies, logistic concepts, process integration strategies and an interactive, standardized communication technology have to be analysed."

Members of the HLTPAG: Anton Demarmels (Ammann), Per Roos (Atlas Copco), Sebastian Bauer (Bauer), Robert Laux (Bomag), Stefan Ortloff (Caterpillar), Vito Martina (CNH), Dobroslav Rak (Doosan), Ichiro Hirami (Hitachi), Phil Layton (JCB), Jörg Hermanns (Komatsu), Wolfgang Burget (Liebherr), Matthias Hess (Manitowoc), Max Boni (Mecalac), Dirk Jahn (Putzmeister), Jukka Ahola (Sandvik), Peter Osterberg (Volvo), Martin Lehner (Wacker Neuson), Günter Hähn (Wirtgen)

CECE-CEMA High-level Group CO₂

Process and operational efficiency improvements reflected in CO₂ emissions reductions

Chairs: Dr Wolfgang Burget, Liebherr-EMtec and dr Eberhard Nacke, Claas

Secretaries: Belen Bravo, CECE and Tim Hamers, CEMA

The CECE- CEMA joint High-level Group continues to explore the CO₂ reduction potential in the field of construction and agricultural machinery applications. The Group stresses the importance of moving from a purely machine-specific approach to a more holistic view ('4 pillars approach'); it means that not only the optimization of all elements related to the machine itself (engine, transmission, hydraulics, tyres, etc.) contribute to reduce emissions; but the process and operational efficiency, together with the sustainable use of alternative energy sources should also be part of the holistic evaluation concept. How digitalization may contribute to machinery- and process - optimisation is one of the key questions that the group will face in the course of 2017.



Exchange of information on regulatory developments



Technical Commission

Technical files at unprecedented speed

Vice-Chair: Stefan Nilsson, Volvo CE

Secretary: Stephan Belaen, CECE

Number of experts: 137

Highlight in 2016: Guiding and steering the CECE technical work regarding engine emissions, the revision of the outdoor noise directive, the lifting of the warning against visibility, the study on the harmonization of road circulation requirements, the study on the review of the machinery directive and the follow-up on Reach, RoHS and Resource efficiency, the so called 3R.

Priority for 2017: Overseeing the proper execution of the work that commenced in 2016, push the road circulation report towards a regulation and monitor new developments, e.g. digitization, machinery safety.

Quote from the vice-chair: “The technical experts of the Technical Commission play a very important role in steering the different Project Teams and monitoring issues that are on the radar.”

Project Teams collect technical knowledge to inform CECE positions



Project Team Engines

Stage V for NRMM engine emissions. Europe to be top of the class for emissions performance

Chair: Jason Ong, Komatsu

Secretary: Belén Bravo, CECE

Number of experts: 35

Highlight in 2016: In 2016 Europe approved the new Regulation (EU) 2016/ 1628 on emissions from engines used in non-road mobile machinery (NRMM). This will introduce a new Stage V which will be implemented from 2019 or 2020 depending on engine power category. With this Regulation European construction equipment will lead the world in terms of emissions performance for the sector. PT Engines provided input to the EU Parliament and Council of members states to ensure that the concerns of the construction machinery sector were properly considered. The group also followed the process for implementing and delegated acts and submitted key concerns to the EU Commission.

Priority for 2017: Support members by providing a better understanding of the new emissions Regulation (EU) 2016/1628. Promote the use of Stage V where emissions control zones are being implemented to address local air quality issues. Monitor progress of the EU Commission report on retrofit emission control devices.

Quote from the chair: “It will be a challenging time for manufacturers as they develop their new products utilising Stage V technology in an exacting timeframe; PT Engines will support members to meet the demands of the new engines emissions Regulation.”



Project Team Machinery

Contributing to the evaluation of our most important piece of safety legislation

Chair: Jason Ong, Komatsu

Secretary: Stephan Belaen, CECE

Number of experts: 24

Highlight in 2016: Providing input to the public consultation of the Commission on the evaluation of 20 years of the machinery directive (check on its effectiveness, efficiency, etc.). In parallel The PT worked together with a consultant conducting a study on the same issue. The PT is also working on the formal objections of the Commission Machinery Working Group.

Priority for 2017: Convince the European Commission that the machinery directive should not be reopened but only be upgraded by the “New Legal Framework” legislation. We wish to discuss with the Commission the current “abuse” of the Machinery Working Group by member states who are pressing for formal objections to circumvent the process of developing consensus standards.

Quote from the chair: “The machinery directive is a good, well functioning piece of legislation, whilst some small improvements can be considered it does not require any substantial change.”



Project Team Noise

Noise reduction must be perceivable and technically feasible

Chair: Darius Sossdorf, VDMA

Secretary: Stephan Belaen, CECE

Number of experts: 65

Highlight in 2016: Develop a draft position paper on a study conducted by the Commission in view of a potential revision of the outdoor noise directive. A CECE position is being worked out for the following equipment that are affected in the report: compaction machines, concrete or mortar mixers, conveying and spraying machines for concrete and mortar, dozers, drill rigs, hydraulic hammers, hydraulic power packs, steel tracked loaders, piling equipment, road milling machines, truck mixers and mobile sieve installations & Mobile waste breakers.

Priority for 2017: Finalise the position paper and work with the European Commission to ensure that legislative requirements are technically and economically viable.

Quote from the chair: “It makes no sense to reduce machinery noise when it’s not perceivable and when the process noise is predominant.”

Project Team Road Circulation

Road Circulation Regulation: On track

Chair: tbd

Secretary: Stephan Belaen, CECE

Number of experts: 36

Highlight in 2016: Working out the CECE preferred legal solution for the harmonized governing of the use of mobile machines travelling on public roads in the EU and the related technical requirements. These technical requirements are being worked out in the so called ‘Industrial Task Force’ where 5 mobile machinery associations are involved.

Priority for 2017: To continue to cooperate with the European Commission and member states to develop a regulation and provide a draft report for the Commission on the detailed technical requirements worked out within the Industrial Task Force.



Project Team Visibility

The warning in the Official Journal should be withdrawn

Chair: tbd

Secretary: Stephan Belaen, CECE

Number of experts: 26

Highlight in 2016: To give industry guidance on what approach to apply during the period when there is no presumption of conformity of EN 474-1 related to visibility aspects and to work actively in the Commission's working group dealing with this issue. The PT also follows closely the ongoing activities on visibility standardization in ISO 5006 and the activities of the ADCO Machinery Working Group on earthmoving equipment.

Priority for 2017: Working closely with the European Commission and the member states so that they are aware that the existing project on ISO 5006, combined with CEN action to update EN 474-1, has successfully addressed the 5 ADCO recommendations and ADCO concerns raised later related to residual risks. Following this, the warning in the Official Journal of the EU should be withdrawn.



Project Team 3R

CECE follows Resources efficiency, RoHs and REACH in a new project team

Chair: Darius Sossdorf, VDMA

Secretary: Belén Bravo, CECE

Number of experts: 30

Highlight in 2016: The new group focused on all topics related to Resources efficiency, RoHS and REACH (3R) that could have an impact on the construction equipment sector. The group is a forum for discussion to follow-up current and new legislation and also to provide input to the EU regulatory bodies ensuring that constraints within our sector constraints are properly considered.

Priority for 2017: CECE will explore the impact of the REACH article 33 obligations for construction machinery products and 'article is an article' impact evaluation. Also, to explore the amended scope in RoHS2 and check the circular economy package.

Quote from the chair: "Manufacturers are facing an increasing workload to be in compliance with demanding legislation. In this context, a forum for discussions on all chemical/resources-efficiency topics that could impact our members is a must."

Product Groups focus on specific types of equipment



Product Group Road Equipment

Enabling easy communication among mixed fleets

Chair: Anton Demarmels, Ammann Group

Secretary: Richard Cleveland, CISMA

Number of experts: 10

Highlight in 2016: Observation and follow-up on the various revisions to machine safety regulations.

Priority for 2017: Realizing a common protocol for machine-to-machine jobsite communication.

Quote from the chair: "Our discussions are driven by the spirit to find common solutions to regulatory requirements and to the challenges of the digital era with minimal boundaries for future product developments and market offerings."



Product Group Tower Cranes

Tower cranes: joint interest to improve quality and timing

Chair: Amaia Susperregui, Jaso

Secretary: Luca Nutarelli, UNACEA

Number of experts: 7

Highlight in 2016: Economics and statistics.

Priority for 2017: Economics; improving quality and timing, increasing the share of the market coverage of the statistics.

Quote from the chair: "Tower crane sales in Europe were up by one third compared to 2016. It looks like the strong growth in the building construction sector in Europe is having a positive effect on current sales of tower cranes. Without external shocks the growth could continue also in 2017."



Product Group Concrete Equipment

Concrete equipment market: stable situation

Chair: Frank Siefert, Liebherr

Secretary: Luca Nutarelli, UNACEA

Number of experts: 90 participants, circa 15 active

Highlight in 2016: Economics and statistics.

Priority for 2017: Increasing the concrete equipment product lines covered by CECE statistics and the number of reporters.

Quote from the chair: "Concrete sales experienced double digit growth in 2016 at a global level, but in Europe, due to a decline in the final months of the year, could only reach the same volume as 2015. According to industry sentiment, business is expected to remain stable in the near future, at the same level as 2015 and 2016."



Product Group Hydraulic Attachment Tools

It is the attachment that makes the machine versatile and productive

Chair: Torsten Ahr, Atlas Copco

Secretary: Sebastian Popp, VDMA/CECE

Number of experts: 50

Highlight in 2016: Establishment of a worldwide statistical exchange on excavator-mounted plate compactors, new hydraulic breakers statistics using working tool diameter.

Priority for 2017: Expand the statistics coverage further; Work on an initiative to highlight the advantages of specialized hydraulic attachments in "deconstruction" rather than conventional demolition.

Quote from the chair: "It is encouraging to see that we still manage to get new manufacturers interested in the work of our group. With the creation of plate compactors statistics, we expanded our coverage beyond the demolition sector which is an important step for us."



Stay informed with CECE market statistics and the leading business barometer for the sector

CECE collects and provides up-to-date market data for many types of construction equipment, and provides a leading indicator on the development of European construction equipment markets on a monthly basis. The information is highly regarded by the participating companies, and is considered a well-developed source of business intelligence.

CECE runs both European and international sales statistics, and is one of the partners of the Intercontinental Statistics Committee which provides worldwide statistics. CECE statistics coverage extends to earthmoving equipment, road equipment, tower cranes, concrete equipment and hydraulic attachments. The CECE Statistical Commission, with representatives from manufacturers and national associations, oversees the proper functioning of the statistical exchange, and manages development process of enlarging and improving the scheme.

Manufacturers are invited to take part in the statistical exchanges by reporting their sales by country, on a monthly

or quarterly (depending on the particular exchange programme) basis. All statistics reported are confidential to the participants and cannot be shared beyond the reporting companies.

Since 2008 CECE has conducted a monthly business trend survey, the CECE Barometer. The objective is to provide the members with a regular indicator of business trends within the European construction equipment industry. The companies taking part in the Barometer receive a full set of the survey results covering the economic situation in Europe each month. A brief summary of the highlights is published on the CECE website.

Companies who are interested in participating in the statistical exchanges are encouraged to contact Sebastian Popp, Secretary CECE Statistical Commission, at sebastian.popp@cece.eu. Companies interested in participating in the monthly barometer should contact CECE Office, info@cece.eu.

| Product group | Product | Reporting cycle | European Retails | Worldwide Retails | Worldwide Shipments |
|-----------------------|------------------------------|--------------------|------------------|-------------------|---------------------|
| Earthmoving Equipment | Crawler Tractors | monthly | x | x | x |
| | 4WD Wheel Loaders | monthly | x | x | x |
| | Motor Graders | monthly | x | x | x |
| | Rigid Frame Haulers | monthly | x | x | x |
| | Articulated Haulers | monthly | x | x | x |
| | Crawler Excavators | monthly | x | x | x |
| | Wheel Excavators | monthly | x | x | x |
| | Skid Steer Loaders | monthly | x | x | x |
| | Compact Track Loaders | monthly | x | x | x |
| | Loader-Backhoes | monthly | x | x | x |
| | Pipe Layers | monthly | | x | x |
| | Telescopic Handlers | monthly | | x | x |
| | Roto Telehandlers | monthly | | x | x |
| | Rough Terrain Forklifts | monthly | | x | x |
| Road Equipment | Vibratory Tampers | monthly | | | x |
| | Vibratory Plates - Fwd | monthly | | | x |
| | Vibratory Plates - Rev | monthly | | | x |
| | Walk-behind Rollers | monthly | | | x |
| | Vib. Tandem Rollers 2D | monthly | | | x |
| | Single Drum Rollers, Smooth | monthly | | | x |
| | Single Drum Rollers, Padfoot | monthly | | | x |
| | Combination Rollers | monthly | | | x |
| | Pneumatic Tired Rollers | monthly | | | x |
| | 3 Wheel Rollers | monthly | | | x |
| | Refuse Compactors | monthly | | | x |
| | Asphalt Pavers-Tracked | monthly | | | x |
| | Asphalt Pavers-Wheeled | monthly | | | x |
| | Hydraulic Attachments | Hydraulic Breakers | monthly | | |
| Primary Crushers | | monthly | | | x |
| Secondary Crushers | | monthly | | | x |
| Grappies | | monthly | | | x |
| Scrap Shears | | monthly | | | x |
| Plate Compactors | | monthly | | | x |
| Concrete Equipment | Truck Mixers | quarterly | | | x |
| | Batching Plants | quarterly | | | x |
| | Mixer Systems | quarterly | | | x |
| | Recycling Plants | quarterly | | | x |
| Tower Cranes | Tower Cranes | quarterly | | | x |



CECE Statistical Commission

Chair: Nicolas Clerc, Caterpillar

Secretary: Sebastian Popp, VDMA/CECE

Number of experts: 31

Highlight in 2016: Quality of statistics data – the top priority given for the year – further improved, as more manufacturers switched to reporting of end-user retail sales.

Priorities for 2017: Together with our international partners AEM, CEMA, and KOCEMA, we will work on various relevant initiatives: A new classification for wheel loaders in response to evolution of machines, a clean statistics coverage of compact wheel loaders and telehandlers, and important adjustments to the compaction equipment programmes, to name only a few.

Quote from the Chair: “Thirteen new companies will start participating in international statistics programmes in 2017 or start reporting new products. This is the highest number we have ever seen, and a clear proof that our statistical work is going into the right direction.”



CECE Congress 2016

European construction machinery sector embraces digital transformation as driver of success

Every second year CECE organises an Industry Congress, which takes place in the country of CECE presidency, this time hosted by SVSS, the Czech association. The 2016 event took place in the capital of the Czech Republic, the beautiful city of Prague.

The CECE Congress is an excellent occasion for industry executives, partner organisations and journalists to meet and discuss the main challenges and opportunities the industry is experiencing in terms of market developments, demands shifts and investment climate.

The theme of the 2016 event was 'Industry in Transformation: Drivers of Success' and took participants on

a geographical journey through the eastern and central European region and the neighboring countries. Special attention was also drawn to the fundamentals of the construction equipment industry: customer relations, and a drive to develop the best solutions in technology and service.

The second day of the Congress started with the Regulatory Update session, where the leaders of the CECE Project Teams gave an update on the main issues and priorities of the CECE regulatory work.

The Economic forum provided an update on the general market situation for our sector. Renowned speakers shed the light on the state of the macro

economy, as well as construction industry perspectives. One of the sessions was focused on the construction equipment market in India.

The Technical forum panel discussions were dedicated to electrification and the construction sites of the future.

The 2016 edition was judged a sound success by participants. Each time the Congress is held, it gains more momentum, as demonstrated by the total turnout of about 200 attendees, and by the increasing social media interaction around the event.

All presentations, photos and information about the event can be found on the dedicated website: www.cece-congress.eu.



IMDER conference

CECE takes center stage at IMDER conference

CECE vice-president Lars-Göran Andersson (SACE) gave an outlook on the challenges and market opportunities for construction equipment manufacturers in Europe, during the international panel of the IMDER conference in Istanbul in October 2016. Apart from shedding light on the development of the market in Europe, CECE's Andersson followed up on the main themes as presented during the CECE Congress 2016, in particular on the importance of digitalisation and the focus on customer needs. More information about the conference is available: [here](#).



Factory visit

European Commission visits Caterpillar

On 4th July 2016 CECE invited the European Commission to take a closer look at machines' safety, noise and road circulation aspects of non-road mobile machinery at Caterpillar Gosselies. The purpose of the visit was to demonstrate the manufacturing and testing of construction machinery on a daily basis. The Commission was represented by Felicia Stoica, Mario Gabrielli-Cossellu and Niccolo Costantini, the policy officers responsible for respectively the machinery directive, outdoor noise and road circulation issues.



JTLM

CECE hosts 26th Joint Technical Liaison Meeting

A large delegation of CECE companies and member associations participated in the 26th JTLM (Joint Technical Liaison Meeting), was organized by CECE in Augsburg from the 6th to the 8th of April, just before the bauma fair. During the JTLM, information on current legislative and normative activities in the EU, US, Latin-America, Japan, Korea, China, Pacific Rim, India and other major countries was exchanged. It was a fruitful meeting with more than 40 participants from across the main regions, and over 80 reports were discussed. In the next CECE Quarterly Technical Bulletin an extensive report will be available for members.



Workers Safety Project

CECE joins EU project on worker safety

In January 2016 CECE joined the EU project on worker safety with contractors and trade unions, promoting a better dialogue in the construction industry with regard to worker-machine safety on construction sites. CECE believes the project offers important opportunities for enhancing stakeholder relations, contributing to a better understanding of the industry in the field of safety and other safety benefits. CECE participated in three workshops where experts from across the EU exchanged views on safety issues and concerns they face in daily life. CECE's particular goal in joining the project is cementing and improving the established standardisation process that facilitates the safe operation of machines.





Pact4Youth

CECE joins the leaders meeting of the Pact4Youth

This involves a coalition of multinationals and business associations lead by CSR Europe, and is a sign of the construction equipment sector’s commitment to attracting young talent to the industry, especially with technical skills. On the 24th November CECE participated in the leaders’ meeting to endorse a set of proposals that aim to make business-education partnerships the “new normal” across Europe. The meeting was co-chaired by Marianne Thyssen, European Commissioner for Employment, Social Affairs, Skills and Labour Mobility, and Viscount Etienne Davignon, Belgian Minister of State and President of CSR Europe.



Factory visit

CECE team visits Wirtgen factory

In June 2016 the CECE team visited the Wirtgen factory in Windhagen, Germany, as part of their annual team off-site event. The purpose of the visit was to expand the knowledge of the CECE team on road building equipment and on manufacturing of construction machinery on a daily basis. The visit was led by Günter Hähn, Managing Director of Wirtgen, who first presented the history of the company and then gave a tour of the factory. The team were able to take a close look at the production process for road milling machines, cold recyclers, soil stabilizers, slipform pavers and surface miners.



Factory visit

CECE team visits Ammann factory

As a part of CECE team’s annual off-site event the team had also visited the Ammann factory in Hennef, Germany. The team had an opportunity to take a closer look at the production process for vibratory plates and soil compactors. CECE president Bernd Holz, Managing Director of Ammann Verdichtung, and Ammann Sales Director Europe (North) presented the history of the Ammann company and gave the tour of the factory.



Factory visit

CECE team visits Doosan factory

In October 2016 the CECE team visited the Doosan factory in Dobris, Czech Republic. The visit was led by Pavel Urban, EMEA Homologation Manager at Doosan. The purpose of the visit was to expand the knowledge of the CECE team on road building equipment and on manufacturing of construction machinery on a daily basis. The CECE team was familiarised with the production process for mini excavators and mini wheeled and tracked loaders. The team had also had the opportunity to do a test drive with a mini excavator and a mini tracked loader.





bauma

CECE hosts seminar on the new industry report at Munich trade fair

bauma is the world’s largest trade fair for construction machinery, building material machines, mining machines, construction vehicles and construction equipment. It is held in Munich, Germany, organised every three years. The 2016 event took place from 11th to the 17th of April and was an overall success for the organisers. In 2016 the number of visitors and exhibitors increased compared to previous edition and the satisfaction survey demonstrated that the vast majority of exhibitors were satisfied with the visitors they met.

On 13th April CECE together with McKinsey&Company, co-hosted a seminar on the findings of the new industry report “Reengineering construction equipment”. The study builds on interviews with more than 30 industry experts, as well as a unique survey of senior executives at more than 75

OEMs. The survey was conducted with the support of CECE, through a survey of member companies and input from an Expert panel.

Over 130 industry representatives and a dozen of trade journalists participated in the seminar. A panel of OEMs and experts discussed the main trends and conclusions.

The European construction equipment industry is confidently looking towards the future and is ready to embrace the transition into the digital era, with a stronger-than-ever focus on technology leadership and customer needs. “We’ve used the past years to make our production leaner and sustain our strength to compete globally. Now, we are shifting from selling just steel and hydraulics to an offering of more all-integrated services to support customers

in executing their work”, commented CECE president Bernd Holz.

The main findings of the study showed that the European manufacturers of construction equipment expect annual growth of 5 to 6 % through 2020, and 2 percentage points in additional profit. Moreover, 69 % of companies are optimistic about the future, with just one out of ten is predicting that their business situation will worsen. Specifically, manufacturers point to two primary opportunities: growth from markets outside Europe and the increasing importance of the aftermarket business (parts, service, and solutions). About six out of ten companies say that these two developments will be the most important trends for the industry.

The press release is available: [here](#). The report is available: [here](#).





CECE maintains active relationships with industry trade press and EU-focused media in Brussels

CECE issues a number of press releases each year to inform the trade press and media in the EU capital on relevant developments. Notably, the annual publication of the CECE Economic Report, each spring, finds a large coverage in the industry press. The CECE Summit and Congress provide interesting content as well. Topics for the ‘Brussels’ media include engine emissions regulation and other environmental issues. CECE’s views on the general industrial business climate and the European regulatory framework are brought to the attention of both sets of media as well.

Press releases in 2016

- 11 January [‘Bernd Holz \(Ammann, SVSS\) takes up CECE Presidency’](#)
- 17 March [‘European construction equipment market performs relatively well in global comparison; striking regional disparities remain’](#)
- 13 April [‘Confident construction equipment industry ready to embrace shift in operational focus’](#)
- 5 July [‘New emission limits: European mobile machines to become cleanest in the world’](#)
- 6 October [‘European construction machinery sector embraces digital transformation as driver of success’](#)
- 6 December [‘AEM and CECE sign International Exhibition Partnership Agreement’](#)

Stay tuned with an array of dedicated publications

Construction Europe

CECE writes a monthly column for the KHL magazine “Construction Europe”.

CECE Members Bulletin

For members only. A regular update for member associations and companies on topics and challenges related to EU legislation and the workings of CECE in general.

CECE EU Newsletter

The CECE EU Newsletter informs stakeholders on issues related to the construction equipment industry, in particular with regard to EU legislation, and voices the industry’s position on more general economic and policy trends.

CECE Quarterly Economic Bulletin

For members and partners only. The Quarterly Economic Bulletin provides insight on the situation in the European construction equipment markets as well as the macro-economic environment.

CECE Technical Bulletin

For members and partners only. The Technical Bulletin describes developments in the field of technical regulation at a detailed level.

CECE Annual Economic Report

CECE publishes its Annual Economic Report in the spring of each year, providing an in-depth look at the state of the European construction equipment sector. The CECE Annual Economic Report is publically available at www.cece.eu to help promote the knowledge and understanding of the sector amongst a wider audience.





CECE engages in important stakeholders' projects

Workers Safety Project

In January 2016 CECE joined the EU-funded project 'Working Safer with Construction Machines – a Multi-Stakeholder Approach', promoting a better dialogue within the construction industry with regard to worker-machine safety on construction sites. The project seeks to facilitate increased worker safety on construction sites in relation to construction machinery by - in the first instance - organising a dialogue, bringing parties together to explore respective concerns and ideas for solutions. The project will consist of 4 to 5 workshops in 2016 and 2017, led by experts, and coordinated by a joint steering group that decides on the basis of consensus.

Pact4Youth

CECE has joined 'Pact4Youth', a Brussels based coalition of multinationals and business associations lead by CSR Europe, as a sign of the construction equipment sector's commitment to attracting young talent to the industry, especially with technical skills. The CECE Steering Group confirmed Henri Marchetta (MECALAC) as CECE 'ambassador' for the project. Pact4Youth is run under the patronage of the European Commission and Parliament, and aims to establish quality partnerships between business and education, notably in the form of apprenticeships and reducing the skills gap, as well as contributing to effective EU and national policy making in this field.

Numeracy for Advanced Manufacturing

In September 2016, CECE endorsed the Memorandum of Understanding for the EU-funded Numeracy for Advanced Manufacturing (NAMA) project. NAMA is a two year programme that develops resources to improve numeracy skills in the advanced manufacturing sector's workforce by showing mathematical skills in the context in which they will be used. The advanced manufacturing sector is changing and new innovative technologies are constantly being developed, therefore CECE endorses the idea that the employees need the right kind of mathematical skills to stay ahead. The Memorandum of Understanding and full list of Endorsers can be found [here](#).

International cooperation with associations on all continents



CECE holds a regular dialogue with the major construction equipment associations in other parts of the world, in particular

those in the USA, China, Japan, South-Korea and India. This activity is focused on keeping abreast of relevant developments in the respective regions and to share expertise and knowledge. Once a year, the secretary generals meet in the framework of the International Association

Committee (IAC), usually during one of the international trade fairs.

The IAC receives input from the TTLM, the Joint Technical Liaising Committee, and the ISC, the International Statistics Committee.

Construction Equipment Associations around the world



North-America, AEM
Association of equipment manufacturers



Japan, CEMA
Japan construction equipment manufacturers association



Korea, KOCEMA
Korea construction equipment manufacturers association



India, ICEMA
Indian construction equipment manufacturers' association



Brazil, Sobratema
Brazilian association for construction and mining technology



China, CCMA
China construction machinery association

European Sister Associations

Agricultural machinery, CEMA
European agricultural machinery

Engines, EUROMOT
European association of combustion engine manufacturers

Municipal Equipment, EUnited
European Association of Municipal Equipment Manufacturers

Material handling, FEM
European federation of materials handling

Engineering industries, Orgalime
European engineering industries association

Garden equipment, EGMF
European garden machinery federation



CECE International Exhibition Partnership Programme mounts up

CECE gives coveted patronage to a limited number of leading sector exhibitions, contributing to successful trade fairs around the globe and targeted to promote business and valuable networks.

In 2015, CECE launched its new International Exhibition Partnership Programme to fortify relations. CECE Partners can obtain Bronze, Silver and Gold Partner packages, and profit from a number of commercially and promotionally attractive services. Construction Equipment trade exhibitions play an important role in fostering both the existing and new business opportunities for manufacturers, suppliers, service providers and customers. Promoting visibility and cooperating with the major international exhibitions is important for CECE and the over 1,200 plus companies it represents.

In 2016 CECE and Messe München signed a Gold partnership agreement. The Gold partnership replaces the previous arrangement between CECE and bauma, and specifies the various services in a more direct manner.

CECE has also signed a partnership agreement with the Association of Equipment Manufacturers (AEM). Conexpo opted for a Gold partnership as well.

Sobratema, the Brazilian construction equipment trade association and organiser of the Latin American exhibition M&T Expo has signed a 'Bronze international exhibition partnership agreement, renewing its long-standing cooperation with CECE under the new partnership system.

Apart from bauma and Conexpo, CECE has a Gold partnership with Intermat and a Bronze with Samoter. Through the Gold partnerships with Messe München and AEM, CECE is also partnering with CTT Moscow, bauma China, bauma Conexpo India and bauma Conexpo Africa.

The major trade shows in 2016 were [bauma](#), [CTT](#), [bauma China](#) and [bauma Conexpo India](#).

The major trade shows in 2017 are [Samoter](#), [Conexpo](#) and [CTT](#).





Riccardo Viaggi
Secretary General (from May)

Riccardo represents the construction equipment sector towards the EU institutions, maintains stakeholder and partner relations, and manages the work of CECE's Brussels office.

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Stephan leads and coordinates activities related to technical legislation on machinery's safety, noise for equipment outdoor and standardisation.

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Belén leads and coordinates technical policy activities related to environmental issues, including the engine exhaust emissions legislation, CO2 emissions, WEEE & RoHS and industrial emissions.

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Roma Guziak
Communications Officer

Roma is responsible for managing and developing CECE's communication activities and supporting the organisation of events. She also manages the monthly Business Barometer.

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Sebastian Popp
Secretary Statistical Commission

Sebastian leads and coordinates all CECE activities related to statistical and economic analysis. Based at VDMA in Frankfurt, he is supported by Hans Jürgen Pons who manages the CECE statistical exchanges.

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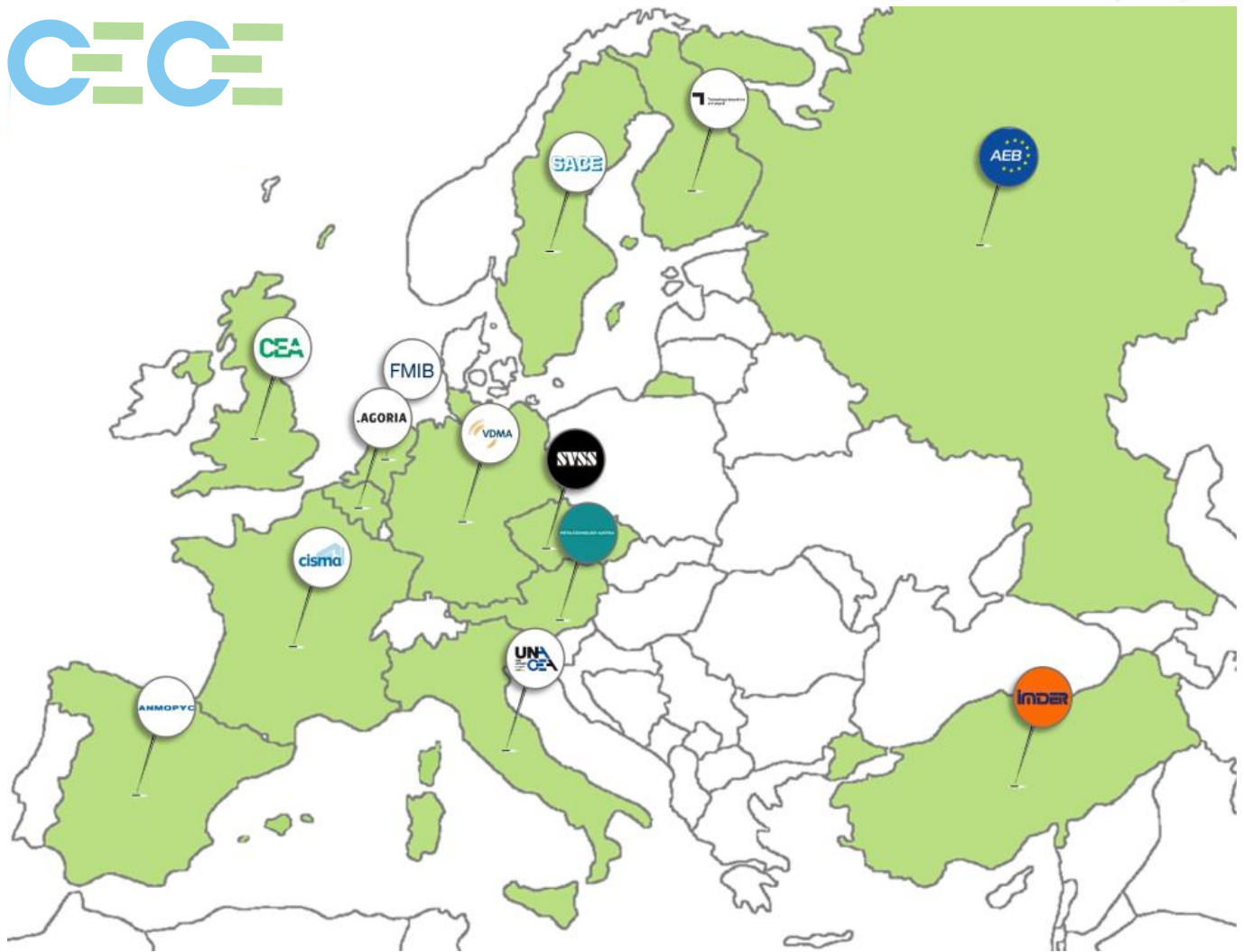


Anja Schnieder
Press Officer

Anja is communications manager at VDMA in Frankfurt and manages CECE relations with trade press. She also supports the organisation of the larger CECE events CECE relations with trade press and supports the organisation of the larger CECE events.

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Our Members



AEB Construction Equipment
www.aebrus.ru

FMIB
www.fmib.nl

AGORIA
www.agoria.be

IMDER
www.imder.org.tr

ANMOPYC
www.anmopyc.es

SACE Construction
www.sace-se.org

Association of the Austrian Machinery and Metalware Industries (FMMI)
www.fmfi.at

SVSS Construction
www.svss.cz/en

CEA Construction
www.thecea.org.uk

UNACEA
www.unaceea.org

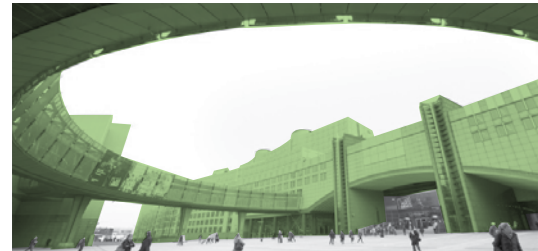
CISMA Construction
www.cisma.fr

Verband Deutscher Maschinen und Anlagenbau (VDMA)
www.vdma.org

The Federation of Finnish Technology Industries
www.teknologiateollisuus.fi/en/



COMMITTEE FOR EUROPEAN
CONSTRUCTION EQUIPMENT



What is the Committee for European Construction equipment?

CECE represents the European construction equipment industry towards the European Institutions, coordinating the views of its national member associations, and working with other organizations worldwide to achieve a fair competitive environment via harmonized standards and regulations.

Our figures

- 13 ASSOCIATIONS
- 1,200 COMPANIES EMPLOYING DIRECTLY AROUND 130,000 PEOPLE.
- TOTAL TURNOVER: 25 BN €
- 20% OF THE WORLDWIDE PRODUCTION

WHAT WE DO

CECE is the acknowledged partner of the institutions of the European Union for all questions related to the construction equipment industry. Based in Brussels, CECE's work involves political representation and the monitoring of legislation and standardization on behalf of its member associations and their corporate members.

CECE also cooperates with CEN and ISO, the European and International Committees for Standardization. CECE furthermore delivers and economic and statistical services to its members and partners.

Representing the interests of the industry

New buildings and infrastructures connect people, boost economies and serve people all over the globe. Construction equipment manufacturers are highly innovative and have invested heavily in increasing the productivity of their machines, while reducing their environmental impact.

The European construction equipment industry forms an important, integral part of the European machinery sector. Manufacturers are predominantly small and medium-sized companies but also large European and multinational companies with production sites in Europe. The industry organised within CECE employs around 130.000 people directly, with a similar number being active in sales and services, and had a turnover of around 25 billion Euro from European production.

Statistics and economic topics

CECE collects and provides up-to-date market data for many types of construction equipment, providing a leading indicator for the development of European construction equipment markets. Since 2008 CECE runs a monthly business trend enquiry, the CECE Barometer. The companies taking part in the Barometer receive a report about the economic situation in Europe each month.

Exhibitions

CECE gives patronage to a limited number of leading sector exhibitions, contributing to successful trade fairs around the globe.



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