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**The European construction
equipment market in
the first half of 2026**



KEY TAKEAWAYS



Market momentum
continues to strengthen



Sustainability investments
drive long-term growth



Positive outlook across
all regions



Circular economy
& efficiency



Digitalization
& connectivity

Energy transition
& electrification

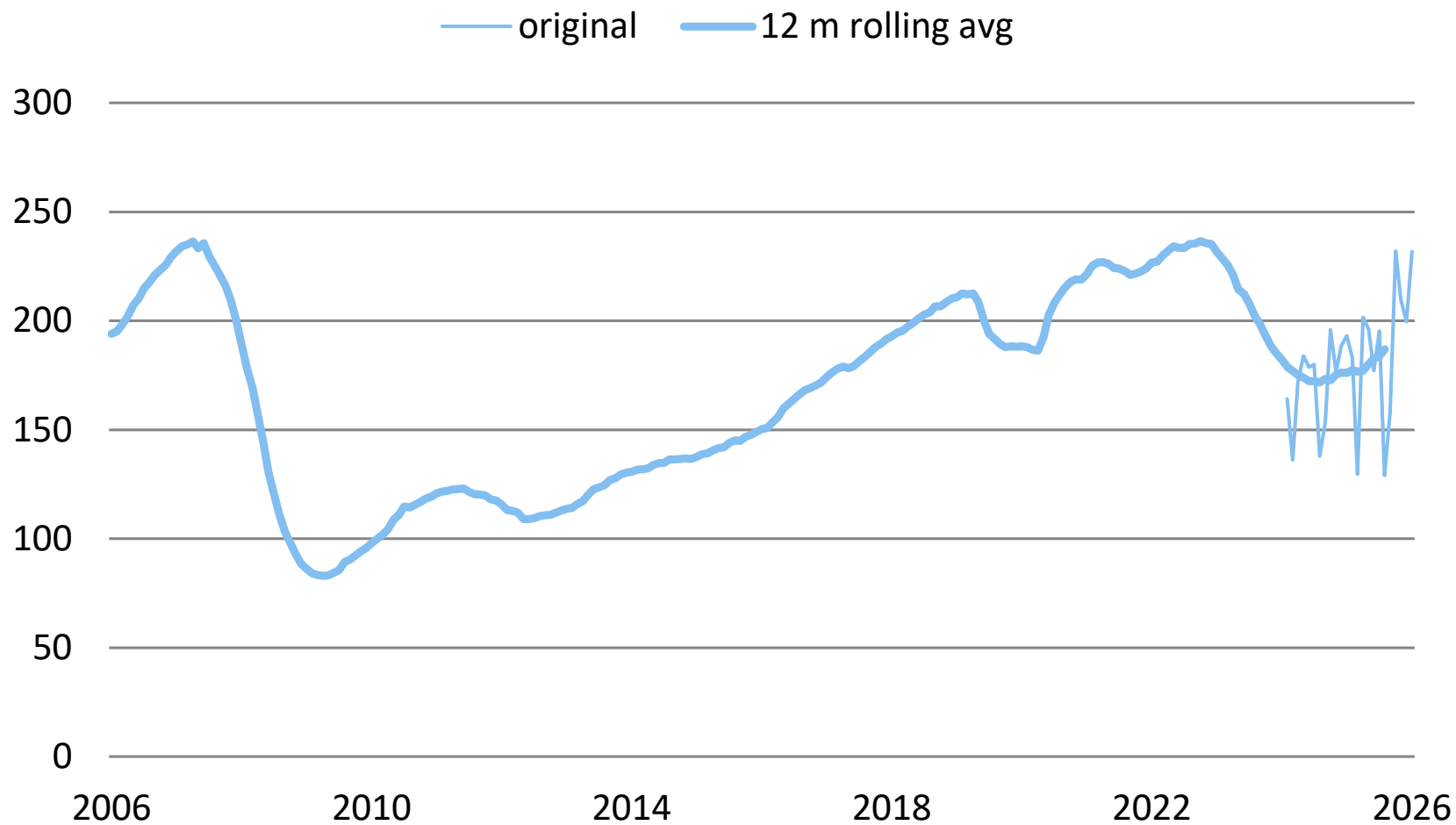


Infrastructure
development

#WEMAKE2BUILD



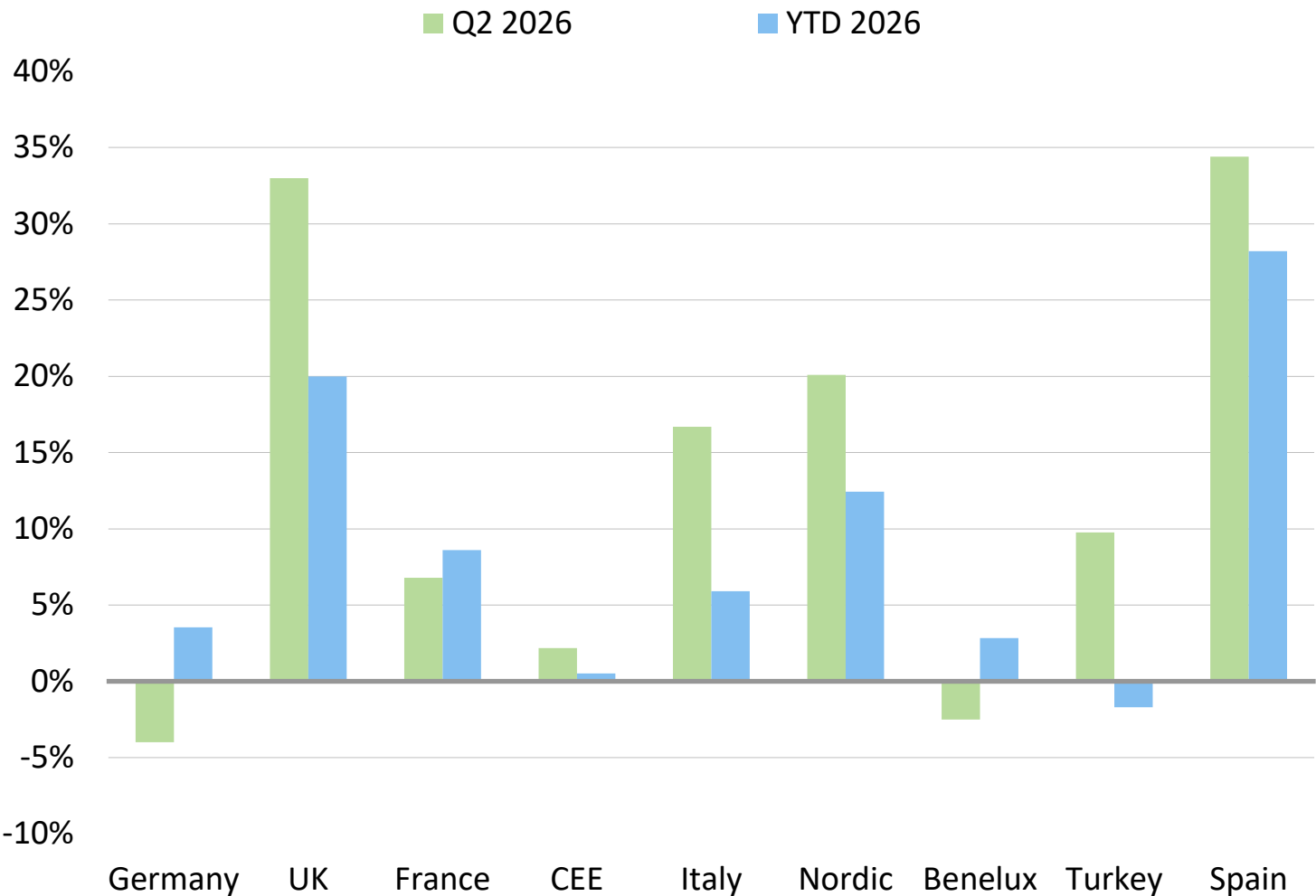
Sales growth momentum picked up in H1 2026



monthly earthmoving equipment sales in Europe, last data point: June 2026, index 2010 = 100



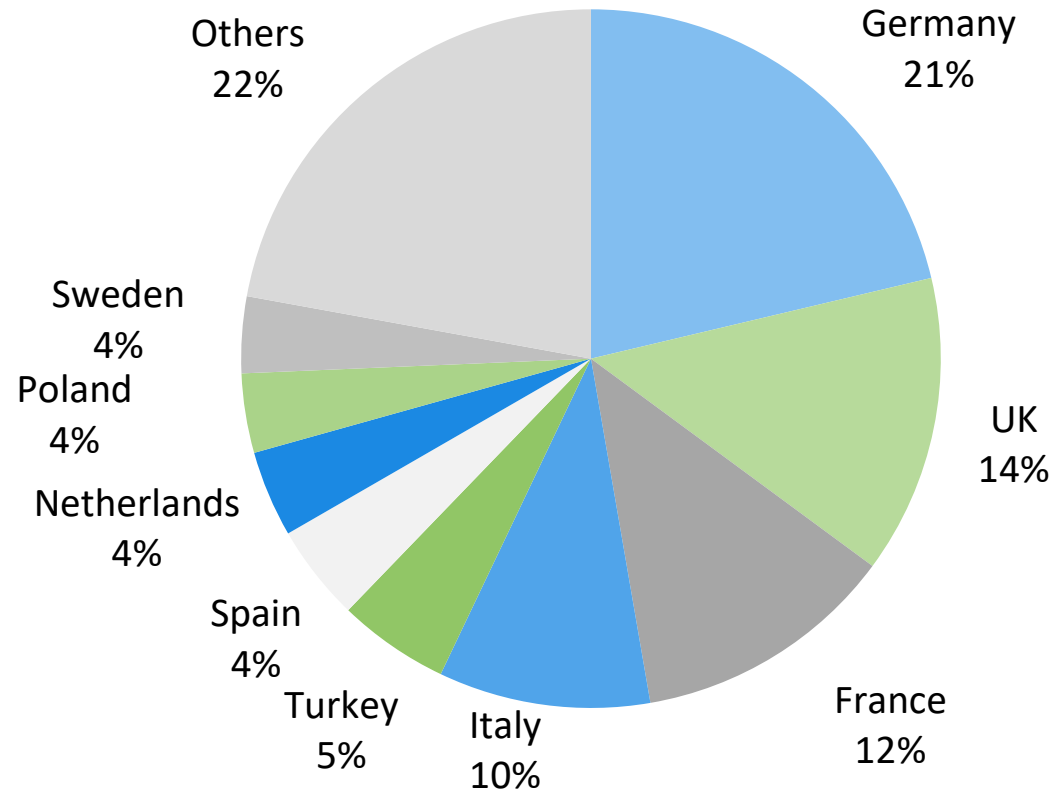
Sales on the European market up by 8%



construction equipment sales on the European market Jan-June 2026 compared to previous year in %



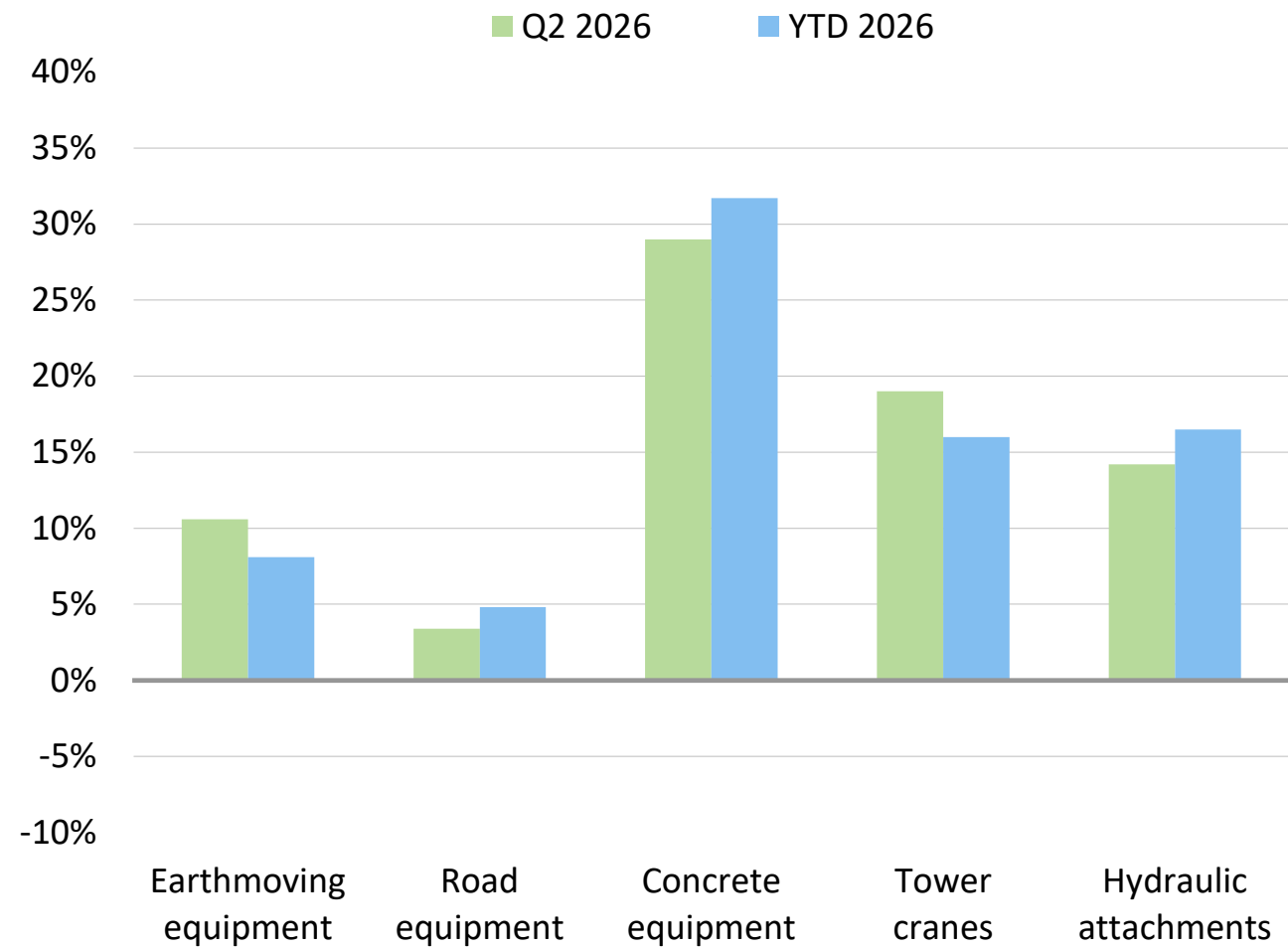
UK market and Southern Europe gain ground



shares of construction equipment sales in European countries, Jan-June 2026



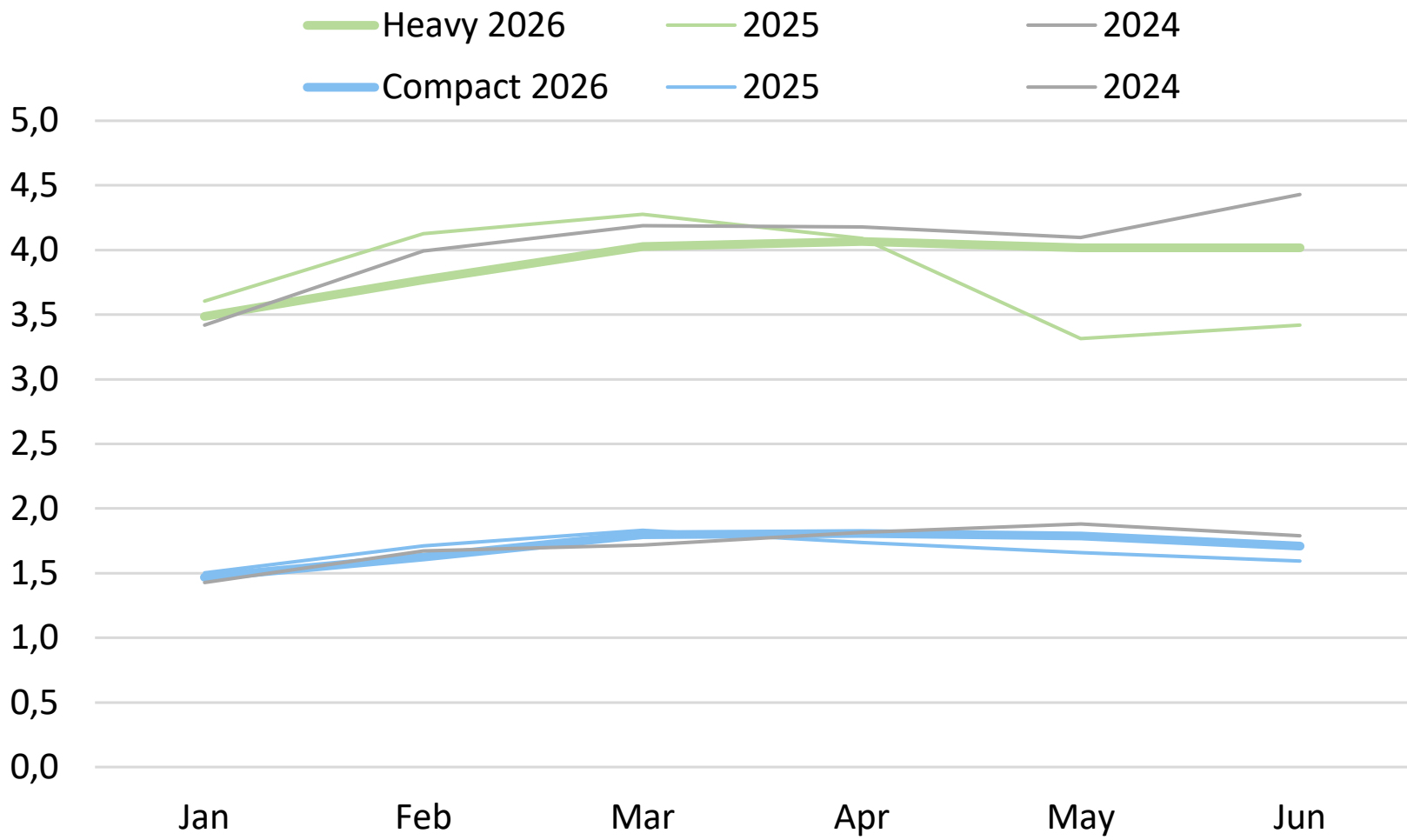
Concrete machinery the best-performing segment



construction equipment sales on the European market Jan-June 2026 compared to previous year in %



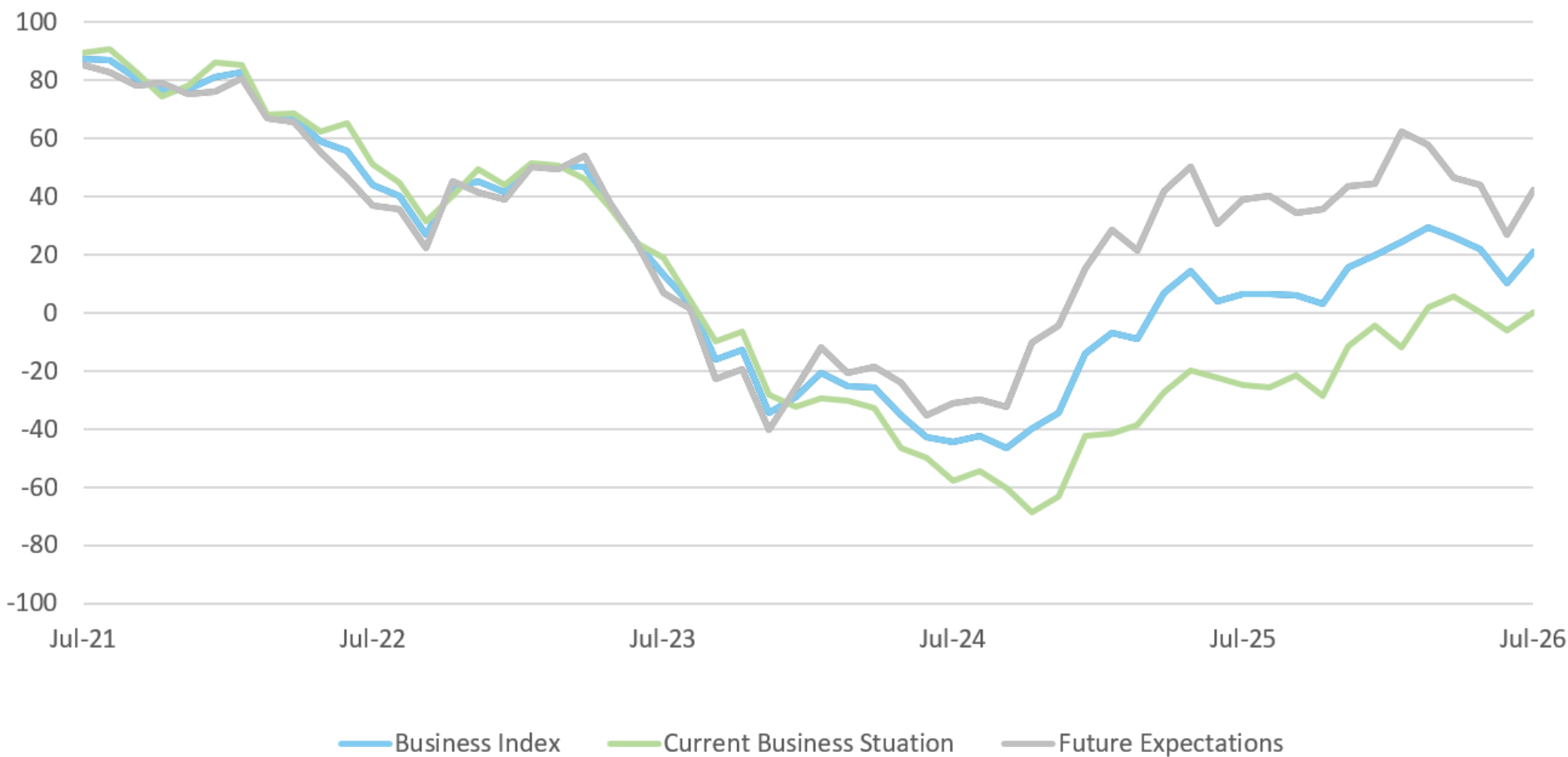
Machine utilization is slightly above last year's level



average operating hours per working day for heavy and compact earthmoving equipment, source: CECE Uptime Tracker



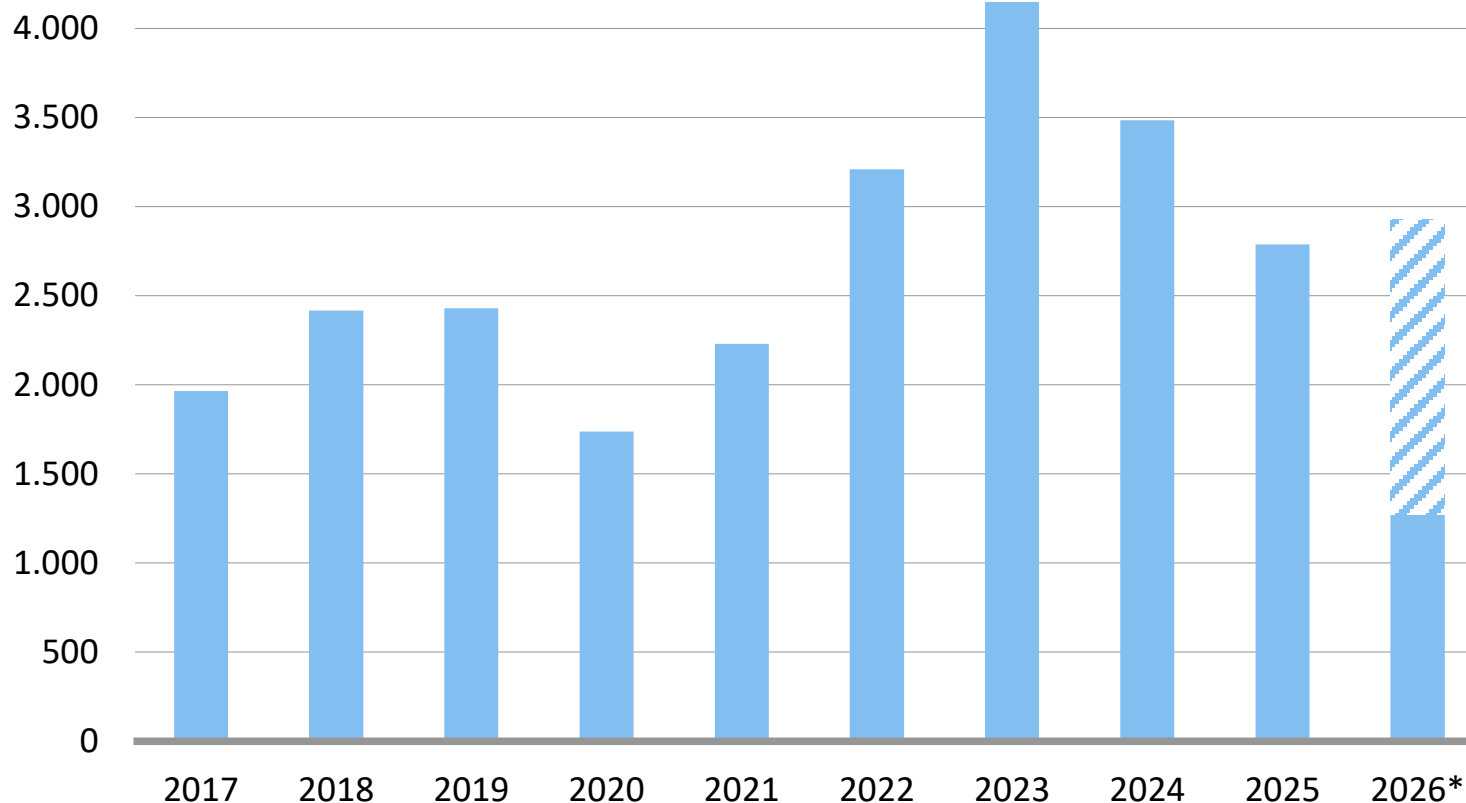
Gradual improvement of business climate continues



source: CECE Business Barometer, July 2026



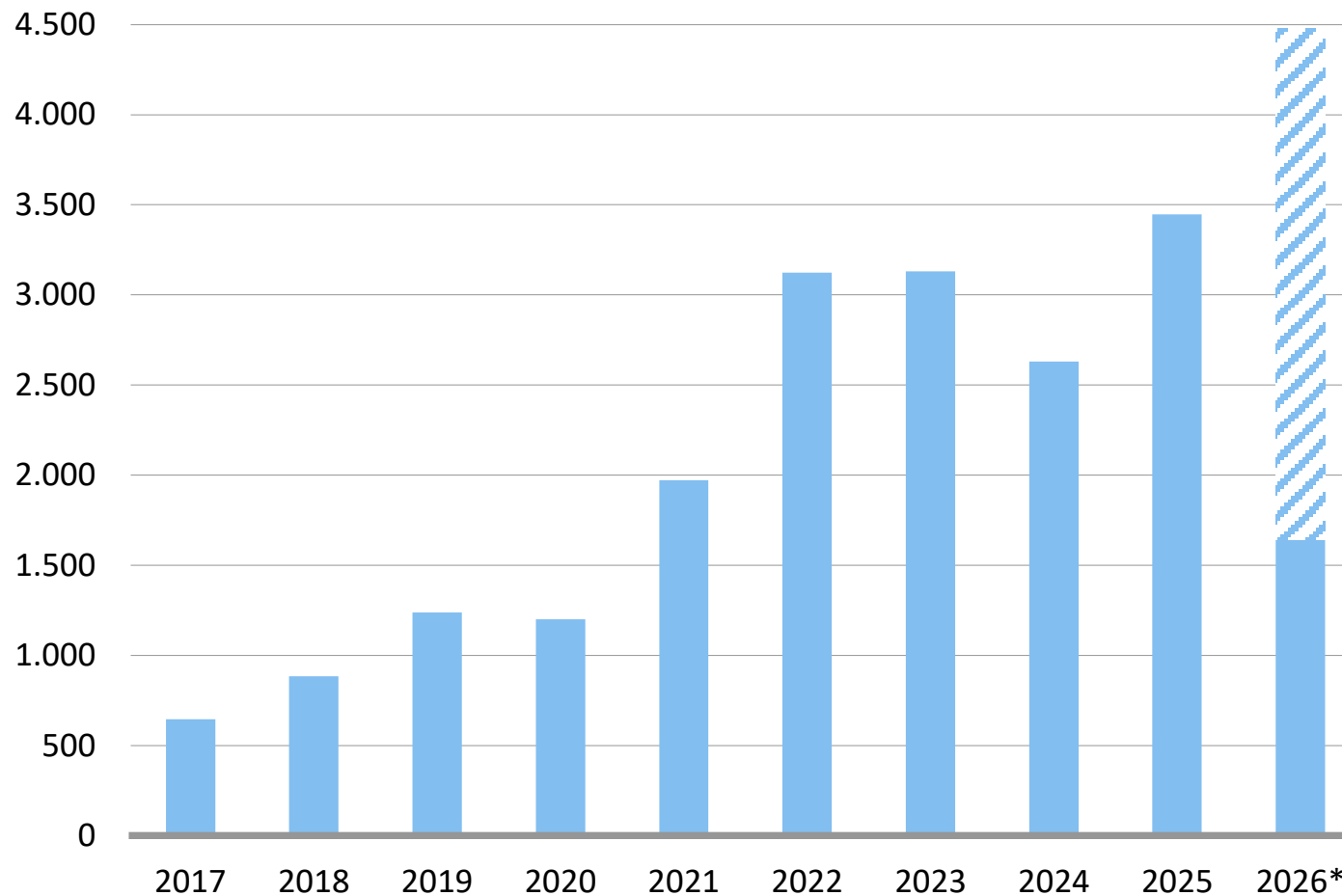
EU exports to the US could bounce back slightly this year



construction equipment exports in EUR million, *=Jan-May 2026 data and projection, source: Eurostat



EU imports from China with further growing momentum



construction equipment imports in EUR million, *=Jan-May 2026 data and projection, source: Eurostat



Summary and Outlook

- European market:
 - After moderate growth in 2025, market sees continued momentum this year
 - Regional growth disparities clearly visible
 - Building construction equipment performing stronger than civil engineering and road construction equipment is primarily a catch-up trend
 - 2026 sales forecast: +5% to +10%
- Global markets:
 - Geopolitical uncertainties remain very high
 - Construction equipment markets in India, SEA, and Latin America with growth impulse in 2026
 - Middle East continues to be in trouble, no sustainable recovery of the Chinese market yet (even fiercer competition of Chinese manufacturers on international markets)
 - Moderate signs of recovery of the US market and European exports to the region
 - 2026 sales forecast: +5%
 - Currently positive numbers may be misleading: The major structural challenges are ahead of us!



**Thank you
very much!**

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