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CECE PRESS RELEASE

European construction equipment sector sees moderate recovery in 2025 with 4.6% growth in sales

- Annual Economic Report & tailor-made video released.
- European construction equipment market: The downturn has bottomed out in 2025.
- Single digit growth in 2026 for the European market is a realistic outlook.

The European construction equipment industry stands at a decisive moment. The CECE Annual Economic Report 2026 shows that after reaching a low point in 2025, the market is stabilising and moderate growth prospects are emerging – provided that the right economic and political framework conditions are put in place now.

Performance 2025

At the macroeconomic level, conditions remain challenging. European economic growth is weak, with GDP increasing by around 0.9% in 2025, while investment remains constrained and consumption grows only modestly. Although interest rates have stopped rising and are gradually stabilising, they remain high compared with pre-2022 levels, continuing to weigh on household finances and real estate investment. Within this environment, the European construction sector remains uneven.

But, in 2025, the European construction equipment market could stop its downturn and even saw moderate sales growth of 4.6% compared to the previous year. Residential building continues to be the main area of weakness, reflecting the ongoing housing downturn across most major European markets. Overall construction output is broadly stable year on year, however, as growth of around 3% in civil engineering and infrastructure activity offsets the decline in building. Infrastructure investment therefore continues to play a stabilising and cushioning role for the sector. Overall, 2025 marks a transition year for the European construction sector with growth drivers remaining fragile.

Outlook 2026

The outlook for 2026 is more positive. Stabilising interest rates, a gradual recovery in private investment and the continuation of infrastructure programmes are expected to support a return to moderate growth of around 2% to 2.5%. This improvement should be driven by a recovery in housing after two years of steep decline, alongside increased investment linked to the energy transition and infrastructure development. The sector enters 2026 with the prospect of a gradual recovery, largely dependent on macroeconomic conditions and public investment policies rather than a spontaneous rebound in demand. The industry continues to face structural challenges, including overregulation and unfair competition as well as the unpredictability of the important US market. Addressing these challenges will require close cooperation between industry and policymakers at both European and national level.

> *"While the economic downturn is behind us, the challenges facing European manufacturers are far from over. Trade barriers are rising, Chinese competition is intensifying, and over-regulation continues to weigh on Europe's industry. With exports to key markets such as the United States under severe pressure, Europe must focus on strengthening its own market. In a changing global economic landscape, a strong European construction market with a genuine level playing field is more essential than ever."*
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> — Riccardo Viaggi, CECE Secretary General

About the Report – together with a short summary in a video

The CECE Annual Economic Report contains sections on the macro-economic situation, the performance of the construction sector, the main markets and main segments of the European construction equipment industry, including the mining industry. The report also includes information from the national CECE member associations, shedding more light on regional developments in the European construction equipment sector.

The full report with detailed figures and graphs can be viewed and downloaded here. **The video animation** can be viewed here. Slides presented during the event are available here.

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About CECE

CECE, the Committee for European Construction Equipment, represents the interests of 1,200 construction and mining equipment manufacturers through national trade associations in Europe. CECE members invest and innovate continuously to deliver equipment with highest productivity and lowest environmental impact. Efficiency, safety and high-precision technologies are key. See also www.cece.eu.