



COMMITTEE FOR EUROPEAN
CONSTRUCTION EQUIPMENT



**2. BIZNIS & TRENDI
V GRADBENIŠTVU**

26. in 27. marca 2019, Portorož

Riccardo Viaggi, CECE Secretary General

**An Overview of Economic Trends
in the Construction Industry**



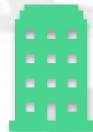
CECE

Committee for European Construction Equipment

Committee for European Construction Equipment



**REPRESENTATIVE
ASSOCIATION OF
MANUFACTURERS**



**ESTABLISHED IN
LONDON = 1959**



**PERMANENT
ESTABLISHMENT IN
BRUSSELS =2004**



**MEMBERS ARE
NATIONAL TRADE
ASSOCIATIONS**



**SECRETARIAT 8
STAFF**

The fundamentals



40 BN €
REVENUES



300 000
OVERALL
EMPLOYMENT



1 200
COMPANIES

An integrated & international sector



20%
SHARE OF GLOBAL
PRODUCTION



26 BN €
EXPORT

A sector for SMEs



The background features a stylized, light-colored illustration of a city skyline. On the left, a construction crane is visible. In the center and right, there are various building silhouettes. A road with dashed lines curves through the scene. A vertical blue bar is positioned on the left side of the page, partially overlapping the illustration.

THE ROAD TO 2024

A CECE Manifesto for the EU Legislative Term

The Road to 2024: A CECE Manifesto for the EU Legislative Term

[Click to watch the video](#)



A CALL TO POLITICAL ACTION

WE CALL ON THE EUROPEAN PARTIES, ALL CANDIDATES AND FUTURE ELECTED MEPs TO SUPPORT A MAJORITY COALITION MANDATE TO THE EUROPEAN COMMISSION ONLY IF INDUSTRY IS SHORTLISTED AS A TOP-5 PRIORITY OF ITS POLITICAL PROGRAMME.

CECE Manifesto

This call to action is complemented by concrete measures CECE is advocating to make sure that Industry and Manufacturing are at the heart of EU policy-making during the 2019-2024 legislature.

// APPOINTMENT OF A VICE-PRESIDENT for Industry within the European Commission

// OUTLINING A NEW AND AMBITIOUS LONG-TERM VISION to feed a newly-drafted EU Industrial Strategy

// CONSIDERATION OF THE INDUSTRY4EUROPE COALITION JOINT PAPERS in drafting the EU Industrial Strategy

// MANDATING THE VICE-PRESIDENT for Industry to implement the EU Industrial Strategy

// MAINSTREAMING INDUSTRIAL COMPETITIVENESS into all EU regulatory decisions through rigorous impact assessment of new initiatives and review of the existing legal framework

// DEVELOPMENT OF THE EU INDUSTRY DAY into the reference appointment and the annual occasion to measure progress in implementation of the EU Industrial Strategy

// CREATION OF A EUROPEAN PARLIAMENT INTERGROUP on Sustainable Industrial Competitiveness to accompany the work of the Commission and gather relevant stakeholders from across all areas and interests

The EU Policies to support a competitive construction equipment industry

1 | INTERNAL
MARKET

2 | ENVIRONMENTAL
SUSTAINABILITY

3 | INTERNATIONAL
TRADE

4 | DIGITAL
CONSTRUCTION



CONSTRUCTION EQUIPMENT SECTOR

Trends and Performances

CECE Annual Economic Report

EQUIPMENT MARKET

2018 was the strongest year for the European construction equipment sector since the economic crisis of 2008/09. Sales on the European market grew by 11%, and the absolute market level is now only 10% below the 2007 peak. During 2018, there was considerable growth momentum during the whole year.

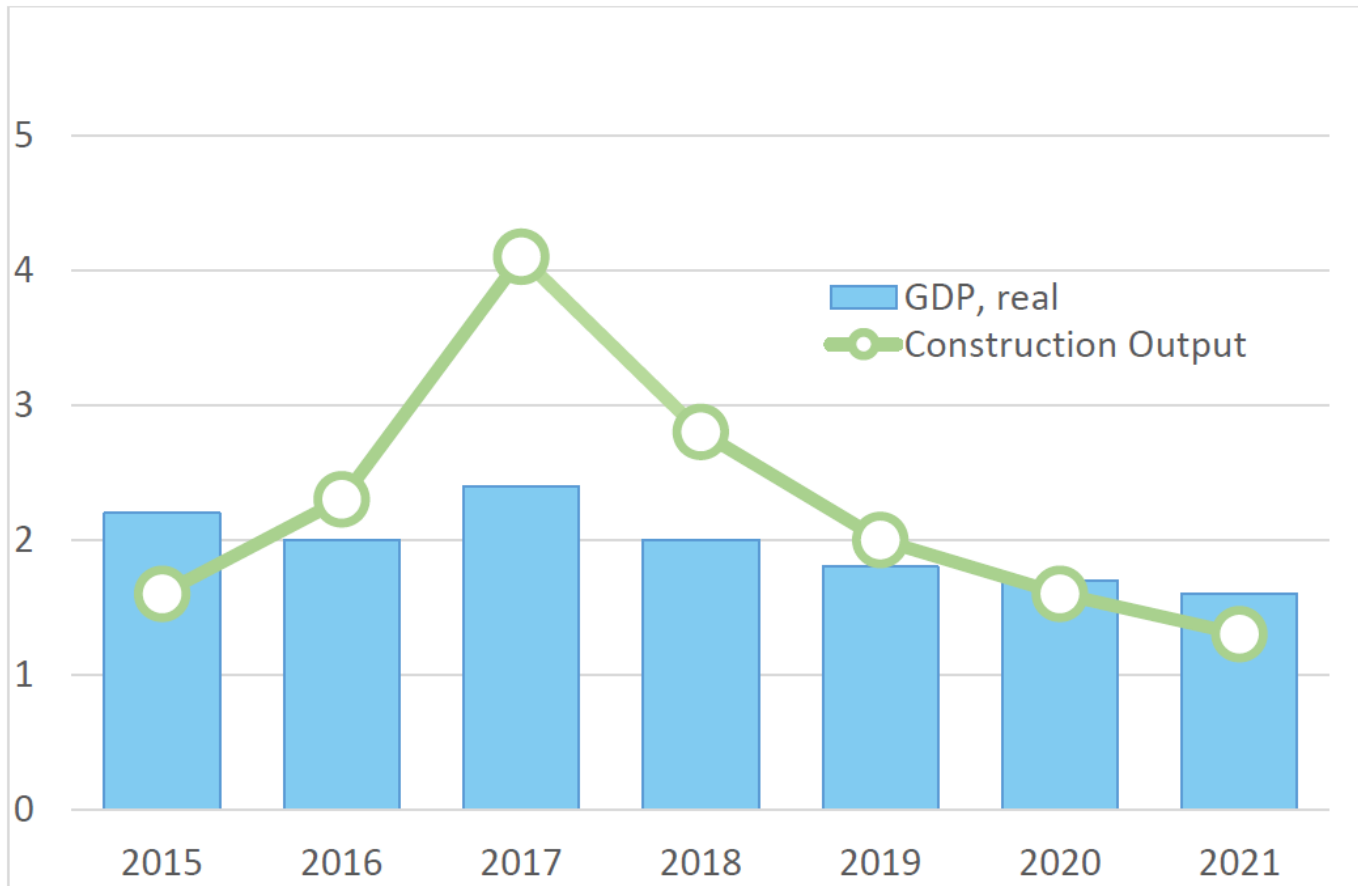
CECE Annual Economic Report

	Gross Domestic Product growth in %				Gross Investment in equipment in %			
	2017	2018	2019	2020	2017	2018	2019	2020
Germany	+2.2%	+1.5%	+1.1%	+1.7%	+4.0%	+4.5%	+2.8%	+1.8%
France	+2.2%	+1.5%	+1.3%	+1.5%	+4.4%	+4.0%	+3.4%	+1.8%
UK	+1.8%	+1.4%	+1.3%	+1.3%	+1.8%	-0.5%	-0.1%	+1.0%
Spain	+3.0%	+2.5%	+2.1%	+1.9%	+5.7%	+3.0%	+3.9%	+2.4%
Italy	+1.6%	+1.0%	+0.2%	+0.8%	+1.8%	+4.9%	+1.8%	+1.7%
EU28	+2.4%	+1.9%	+1.5%	+1.7%	+2.9%	+3.0%	+2.5%	+1.8%

GDP forecast for European countries, source: European Commission, European Economic Forecast, February 2019

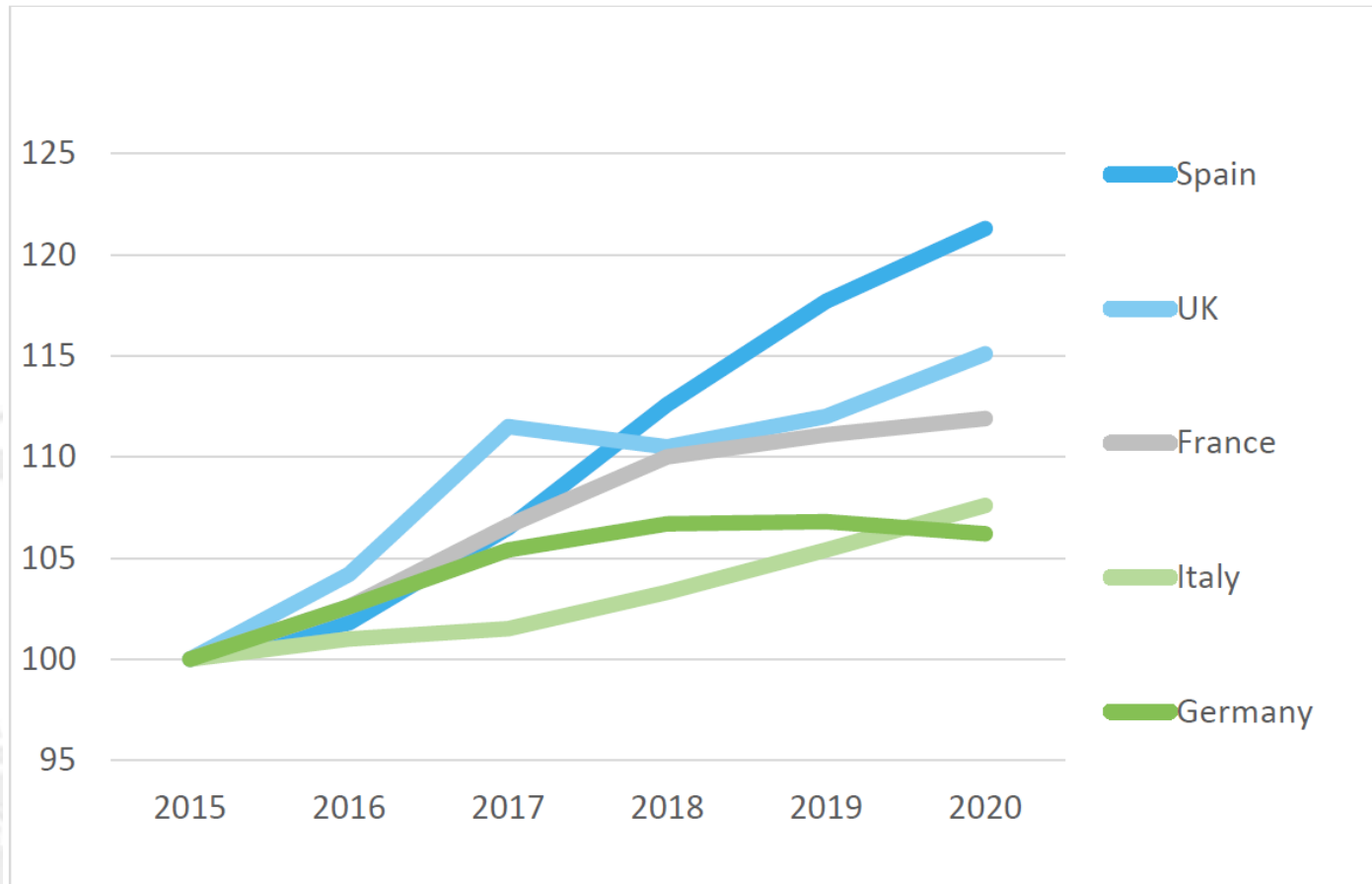
Investment growth forecast for European countries, source: REXECODE Forecast, December 2018

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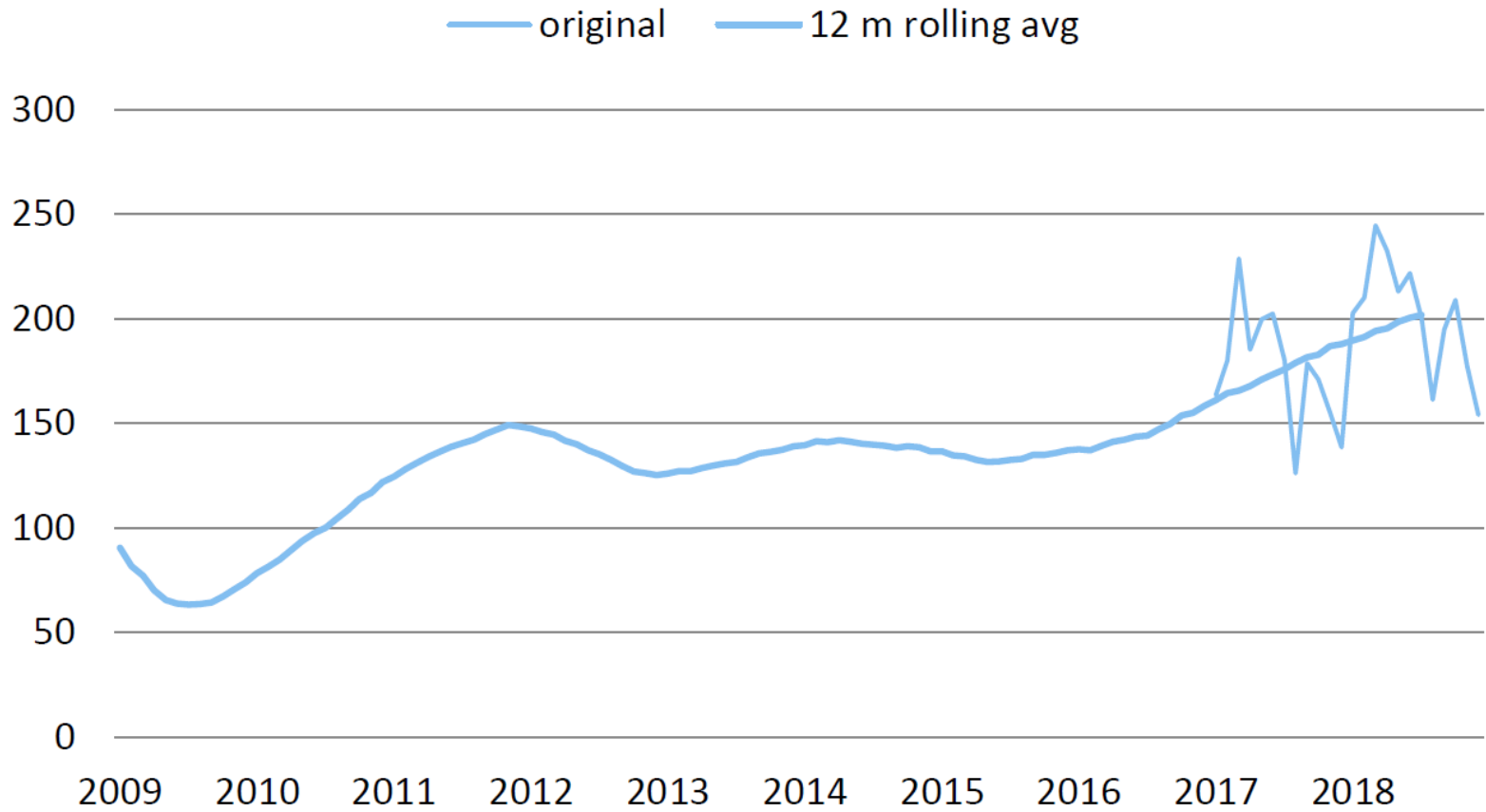
GDP vs. Construction Output; y-o-y change, in %; source: Euroconstruct

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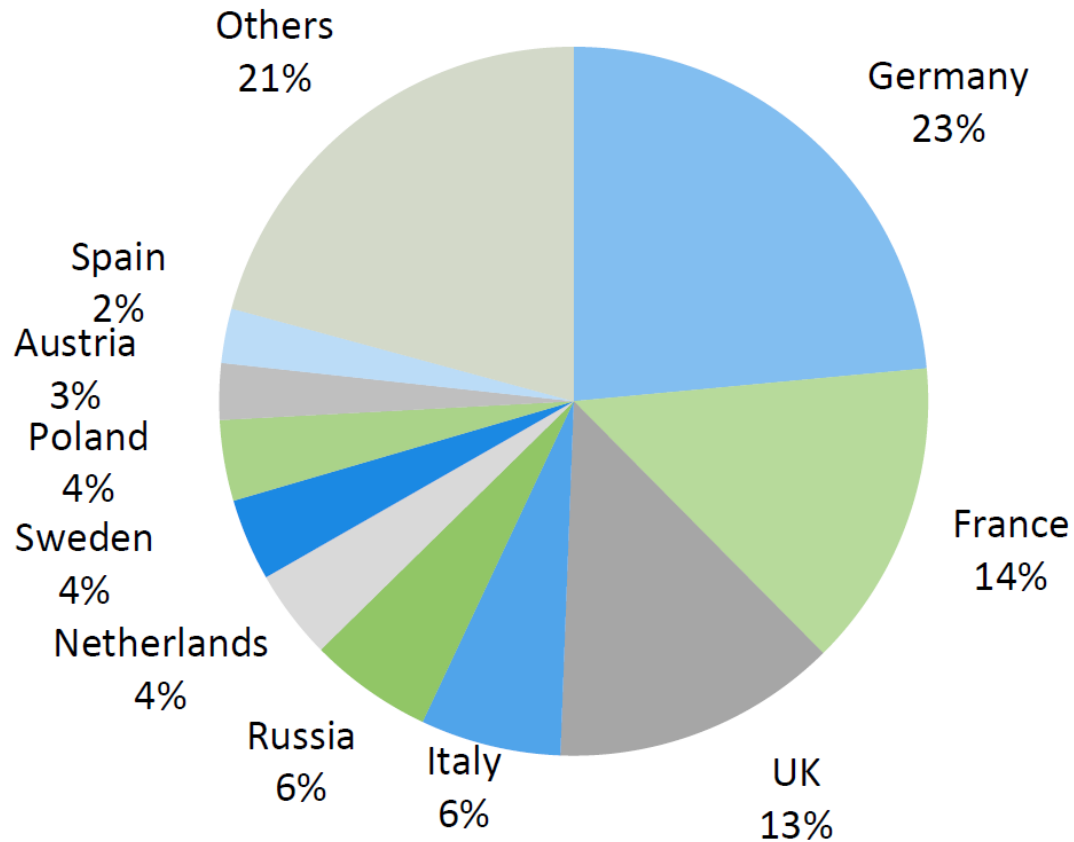
Total Construction Index; source: Euroconstruct

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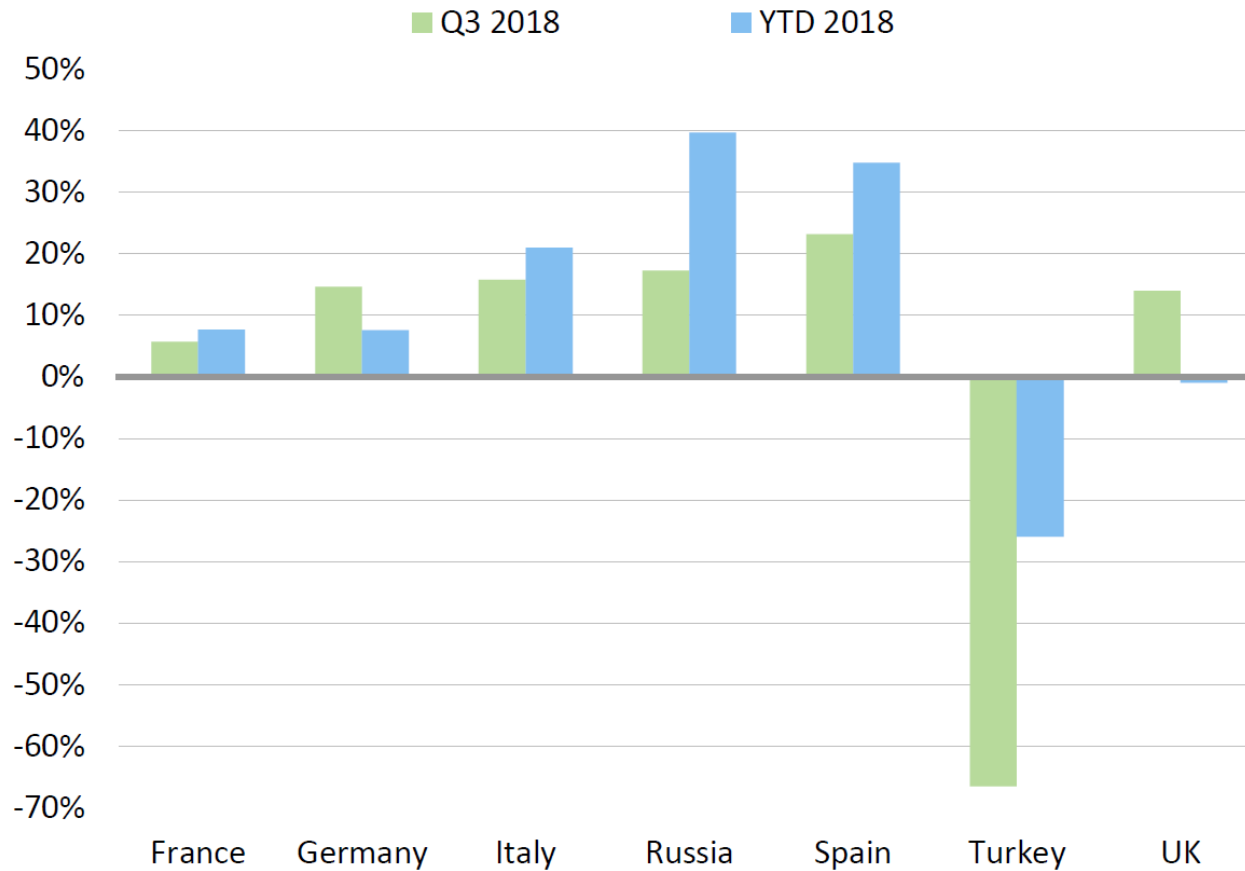
Monthly construction equipment sales in Europe (index 2010=100)

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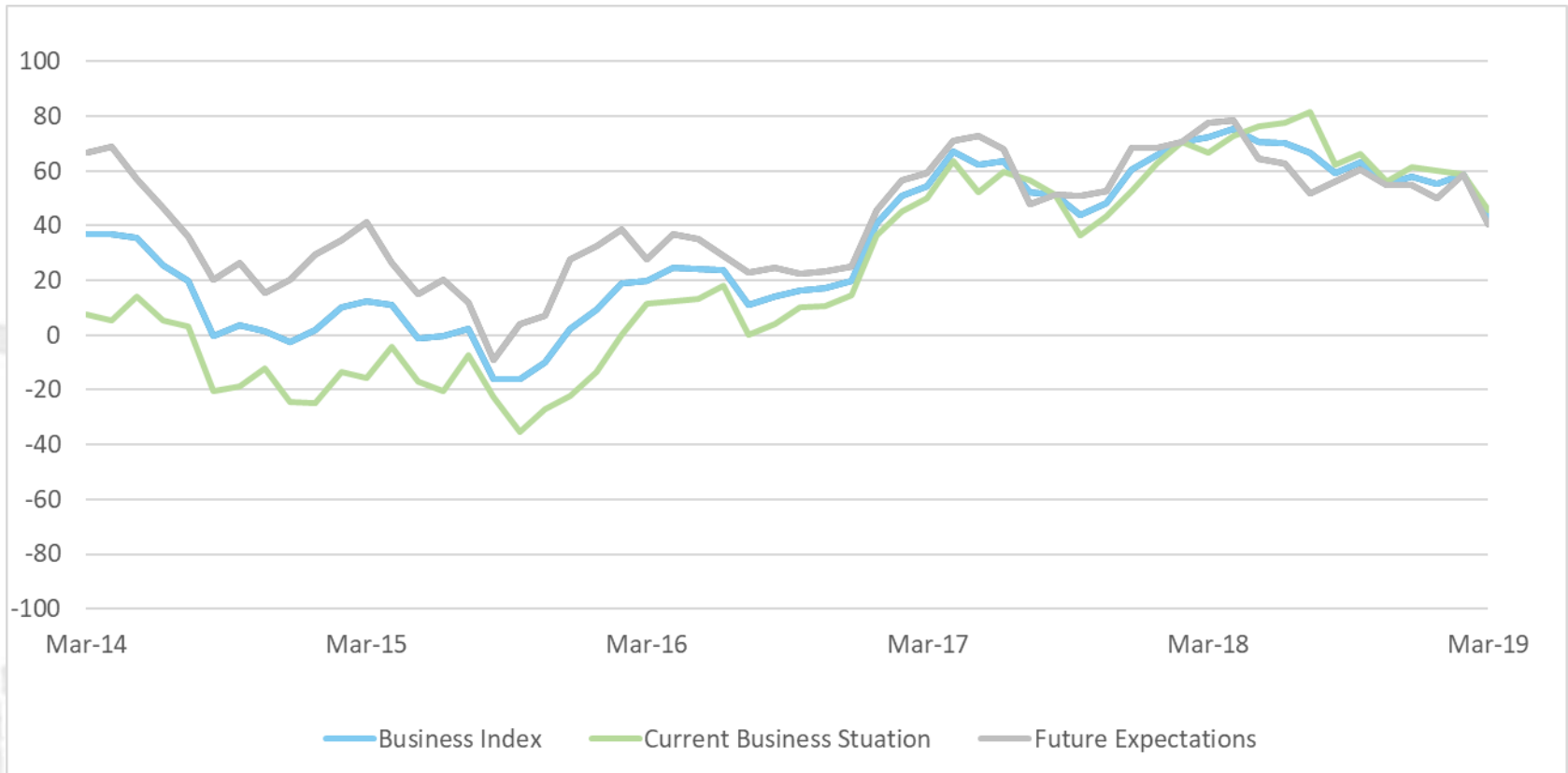
Shares of construction equipment sales in European countries, 2018

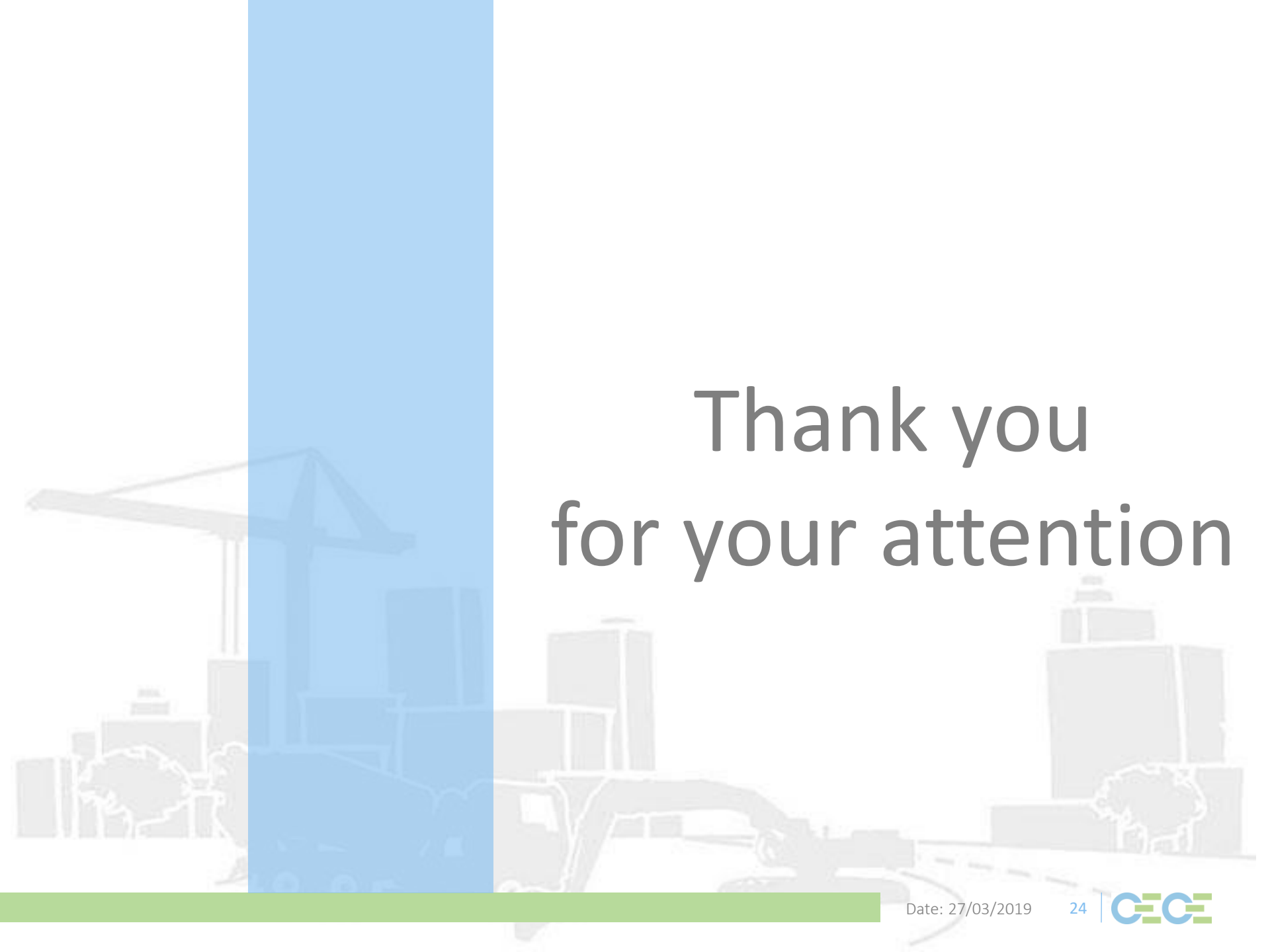
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Construction equipment sales in major European markets compared to previous year in %

CECE Business Climate Index



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Thank you
for your attention



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