

Construction Equipment Rental Market Report by Equipment Type (Earthmoving, Material Handling, Concrete and Road Construction), Propulsion System (Electric, ICE), Application (Residential, Commercial, Industrial), and Region 2024-2032

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Abstracts

The global construction equipment rental market size reached US\$ 116.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 188.2 Billion by 2032, exhibiting a growth rate (CAGR) of 5.3% during 2024-2032. The market is experiencing steady growth driven by the growing demand for flexible rental agreements, rising focus on cost-efficiency in construction projects, and integration of advanced technologies to enable real-time monitoring of machinery while providing data on performance.

Construction Equipment Rental Market Analysis:

Market Growth and Size: The market is witnessing moderate growth, driven by the increasing construction activities, along with the rising focus on cost-efficiency.

Technological Advancements: The introduction of more efficient, safe, and eco-friendly machinery is strengthening the market growth. Moreover, the integration of advanced technologies like telematics systems to enable real-time monitoring of machinery is positively influencing the market.

Industry Applications: Construction equipment rentals find applications in residential, commercial, and infrastructure development, meeting the needs of various projects.

Geographical Trends: Asia Pacific leads the market, driven by the increasing construction of high-rise buildings. However, North America is emerging as a fast-growing market due to stringent environmental and safety regulations.

Competitive Landscape: Key players are focusing on sustainability by incorporating eco-friendly and electric construction equipment into their fleets. They are aiming to align

with environmental regulations and meet the growing demand for green construction solutions.

Challenges and Opportunities: While the market faces challenges, such as supply chain disruptions, it also encounters opportunities in offering innovative and sustainable equipment solutions.

Future Outlook: The future of the construction equipment rental market looks promising, with the rising adoption of advanced technologies in construction equipment. Moreover, the increasing focus on maintaining environmental standards is expected to propel the market growth.

Construction Equipment Rental Market Trends:
Growing demand for flexible rental agreements

The increasing adoption of rental agreements that offer the flexibility to scale equipment up or down as needed is contributing to the growth of the market. This is particularly advantageous for contractors dealing with fluctuating workloads. They can adjust their equipment inventory to match the demands of their current projects while optimizing resource allocation. Apart from this, each project is unique and requires specific equipment types and quantities, which makes rental a preferred choice among organizations. Additionally, renting allows companies to tailor their equipment choices to suit individual project requirements, which is bolstering the market growth. Furthermore, a company working on a high-rise construction project may need specialized cranes for a limited duration. Instead of investing in these expensive machines, they can rent them for the duration of the project, ensuring they have the suitable tools for the job without the long-term commitment. Besides this, the thriving construction sector around the world is propelling the market growth.

Rising focus on cost-efficiency

The escalating demand for construction equipment rental on account of the rising focus on cost-efficiency is supporting the growth of the market. Apart from this, purchasing heavy machinery requires significant upfront costs, including the purchase price, maintenance, insurance, and depreciation expenses. On the other hand, equipment rentals offer a more budget-friendly alternative. In addition, renting allows construction companies to access a wide range of specialized machinery without bearing the full financial burden, which is propelling the market growth. Moreover, this flexibility is especially valuable for projects with varying equipment requirements. In line with this, rental agreements often cover maintenance and repairs, relieving lessees of these responsibilities. Furthermore, renting eliminates the long-term commitment associated with ownership. Additionally, the increasing focus on construction equipment rental, as it

allows companies to quickly adapt to changing project demands, is impelling the market growth. This financial agility and reduced financial risk make equipment rentals an attractive choice for various companies.

Technological innovations

Innovations in construction equipment assist in enhancing safety, efficiency, and sustainability. In addition, the integration of telematics and the Internet of Things (IoT) enables real-time monitoring of machinery, providing data on performance, fuel consumption, maintenance needs, and location. This data allows for proactive maintenance and efficient resource allocation. Moreover, the rising demand for electric and hybrid construction equipment, as it offers reduced emissions, lower operating costs, and quieter operation, is bolstering the market growth. Apart from this, self-driving equipment, robotic arms, and drones are used for tasks, such as excavation, concrete pouring, and site inspection. These innovations improve precision and reduce labor costs, which is supporting the market growth. Furthermore, innovations in materials are leading to the development of lightweight yet durable components, reducing the overall weight of construction equipment. This enhances mobility and fuel efficiency while maintaining structural integrity. Additionally, safety innovations include features like collision avoidance systems, operator alertness monitoring, and enhanced visibility through cameras and sensors.

Construction Equipment Rental Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on equipment type, propulsion system, and application.

Breakup by Equipment Type:

Earthmoving

Excavator

Loader

Backhoe

Motor Grader

Others

Material Handling

Crawler Crane

Trailer-Mounted Crane

Truck-Mounted Crane Concrete and Road Construction

Earthmoving accounts for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the equipment type. This includes earthmoving (excavator, loader, backhoe, motor grader, and others), material handling (crawler crane, trailer-mounted crane, truck-mounted crane), and concrete and road construction. According to the report, earthmoving represented the largest segment.

Earthmoving equipment includes machinery designed for excavation, grading, and site preparation. In addition, it encompasses bulldozers, excavators, loaders, backhoes, and graders. Besides this, the growing demand for earthmoving rental equipment on account of the rising construction of buildings, roads, and lands development is offering a positive market outlook.

Material handling is crucial for the transportation and handling of construction materials and goods on job sites. It comprises various equipment, such as forklifts, telehandlers, and cranes. In line with this, the rental of material handling equipment is essential in construction activities involving heavy lifting, such as warehouse construction, industrial projects, and material transport at construction sites.

Concrete and road construction equipment includes machines specialized in tasks like concrete mixing, paving, and road maintenance. It comprises concrete mixers, pavers, rollers, and asphalt plants. In addition, these machines are critical for the construction of roads, bridges, highways, and the development of concrete structures. They are often rented to ensure that project-specific requirements are met efficiently.

Breakup by Propulsion System:

Electric
ICE

ICE holds the largest market share

A detailed breakup and analysis of the market based on the propulsion system have also been provided in the report. This includes electric and ICE. According to the report, ICE accounted for the largest market share.

ICE equipment is powered by traditional internal combustion engines, usually running on diesel or gasoline fuels. This category includes a wide range of construction machinery like diesel-powered excavators, bulldozers, loaders, and generators. In addition, ICE equipment is known for its robustness, high torque, and ability to handle heavy-duty tasks, which makes it suitable for various construction applications.

Electric equipment is powered by electricity, often from grid power or rechargeable batteries. This category covers electric versions of construction machinery, such as electric excavators, compactors, and aerial lifts. In line with this, electric equipment is favored for its environmental benefits, reduced emissions, quieter operation, and lower operating costs.

Breakup by Application:

Residential

Commercial

Industrial

The report has provided a detailed breakup and analysis of the market based on the application. This includes residential, commercial, and industrial.

The rising adoption of construction equipment rental in residential construction projects, such as building single-family homes and apartment complexes, is propelling the growth of the market. In line with this, equipment rentals for residential applications typically involve smaller to mid-sized machinery, such as mini excavators, skid-steer loaders, and compactors. These machines are well-suited for tasks like excavation, landscaping, and foundation work.

Commercial construction encompasses the development of retail stores, office buildings, hotels, restaurants, and other non-residential structures. Rental equipment for commercial applications often includes a broader range of machinery, such as larger excavators, cranes, and concrete equipment. Furthermore, these machines support tasks like site preparation, steel erection, and concrete pouring.

Industrial construction projects involve the creation of manufacturing facilities, warehouses, power plants, and other heavy industrial structures. Equipment rentals for industrial applications usually focus on heavy-duty machinery like large excavators, industrial forklifts, and specialized cranes. These machines are essential for heavy

lifting, material handling, and industrial facility construction.

Breakup by Region:

North America

United States

Canada

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

Asia Pacific leads the market, accounting for the largest construction equipment rental market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share due to the rising construction projects, ranging from high-rise buildings to transportation infrastructure. Besides this,

the increasing demand for cost-effective construction equipment rental is propelling the growth of the market. In addition, favorable government initiatives in the region are supporting the market growth.

North America stands as another key region in the market, driven by the rising construction of residential and commercial spaces. Apart from this, stringent environmental and safety regulations are impelling the growth of the market. Moreover, rental companies in the region are increasingly updating their fleets to meet these standards, attracting clients who prioritize safety and environmental responsibility.

Europe maintains a strong presence in the market, with the growing demand for construction equipment rentals on account of the rising infrastructure projects. In addition, the increasing development of eco-friendly equipment to maintain environmental sustainability is bolstering the growth of the market in the region. Moreover, the rising focus on renewable energy installations that require a wide range of specialized construction equipment is strengthening the market growth.

Latin America exhibits growing potential in the construction equipment rental market on account of the increasing focus on reducing costs in infrastructure projects. In line with this, the growing demand for construction equipment rental due to the thriving construction sector is offering a positive market outlook in the region.

The Middle East and Africa region shows a developing market for construction equipment rental, primarily driven by the thriving tourism sector. Apart from this, favorable government initiatives for infrastructure projects are contributing to the growth of the market. Furthermore, the rising urbanization is supporting the market growth in the region.

Leading Key Players in the Construction Equipment Rental Industry:

Key players in the market are continuously investing in expanding and updating their equipment fleets by acquiring new machinery or upgrading existing equipment to meet regulatory standards. In line with this, they are focusing on sustainability by incorporating eco-friendly and electric construction equipment into their fleets. They are aiming to align with environmental regulations and meet the growing demand for green construction solutions. Moreover, companies are incorporating digital technologies to streamline their operations. They are using online platforms and mobile apps to make equipment selection, booking, and tracking more convenient for buyers. Furthermore, they are offering customized equipment solutions to meet specific project needs.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Ahern Rentals Inc.
Boels Rental
Caterpillar Inc.
Finning International Inc.
H&E Equipment Services Inc.
Herc Rentals Inc.
Hitachi Construction Machinery Co. Ltd. (Hitachi Ltd.)
Liebherr-International AG
Nishio Rent All Vietnam Co. Ltd
Ramirent Oy
United Rentals Inc.
Kanamoto Co. Ltd.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Latest News:

April, 2023: Boels Rental acquired Norwegian rental company BAS Maskinutleie through its Nordic subsidiary Cramo. This acquisition is an important step for Cramo Norway, as BAS is a well-established company that not only adds equipment and locations, but above all new competences and expertise.

June 5, 2023: H&E Equipment Services Inc. announced the opening of its Houston South branch, its 22nd rental location in the state of Texas. The branch includes a fully fenced yard area, offices, and a separate repair shop and can handle a variety of construction and general industrial equipment.

March, 2022: Herc Rentals Inc., a leading North American equipment rental supplier, entered into a purchase agreement to acquire Cloverdale Equipment Company. The combined teams and resources position Herc Rentals to be a preeminent equipment rental partner in the Great Lakes region and nearby markets, serving a diverse mix of construction, industrial and government consumers.

Key Questions Answered in This Report

1. What was the size of the global construction equipment rental market in 2023?
2. What is the expected growth rate of the global construction equipment rental market

during 2024-2032?

3. What are the key factors driving the global construction equipment rental market?
4. What has been the impact of COVID-19 on the global construction equipment rental market?
5. What is the breakup of the global construction equipment rental market based on the equipment type?
6. What is the breakup of the global construction equipment rental market based on the propulsion system?
7. What are the key regions in the global construction equipment rental market?
8. Who are the key players/companies in the global construction equipment rental market?

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