

# **Tower Crane Rental Market by Capacity (Low (5–20 tons), Low to Medium (20–100 tons), Heavy (100–500 tons), Extreme Heavy (>500 tons)), End-use industry (Building & Construction, Infrastructure, Energy & Power), and Region - Global Forecast to 2030**

<https://marketpublishers.com/r/TD85B2A7977EEN.html>

Date: June 2025

Pages: 226

Price: US\$ 4,950.00 (Single User License)

ID: TD85B2A7977EEN

## **Abstracts**

The tower crane rental market is expected to reach USD 22.1 billion by 2030 from USD 17.1 billion in 2025, at a CAGR of 5.2% during the forecast period.

The tower crane rental market is experiencing significant growth, driven by an uptick in construction activity across infrastructure, commercial, and residential sectors. Renting tower cranes offers flexibility, cost-effectiveness, and access to advanced equipment without the financial burden of ownership, making it an appealing option for developers and contractors. Demand for tower crane rentals is particularly robust in emerging economies that are heavily investing in urban development, essential transportation systems, and renewable energy infrastructure. The increasing scale and complexity of construction projects are necessitating the use of high-capacity and specialized cranes, thereby further accelerating rental demand. Additionally, advancements in technology, enhanced safety features, and the capability for remote operation are increasing the appeal of rental options. The market is particularly vibrant in the Asia Pacific region, fueled by ongoing urbanization, government-led infrastructure investments, and a growing need for rental solutions that align with project-specific requirements and sustainability goals.

“Low (5–10 tons) to be the second-largest capacity segment”

The low-capacity segment (5–10 tons) is projected to be the second largest within the tower crane rental industry. This segment achieves a balance between lifting capacity

and operational flexibility, making it ideally suited for mid-rise buildings, commercial complexes, and infrastructure projects that do not require heavy lifting. The increasing trend of vertical expansion in urban areas and a surge in small to mid-sized infrastructure initiatives drive demand for this category. Furthermore, rental solutions offer contractors a cost-effective means of accessing reliable equipment without the burden of long-term ownership. The growth potential in this segment is particularly pronounced in developing economies, where construction companies, often sensitive to costs, are seeking efficient and effective lifting solutions.

“Infrastructure segment accounted for the second-largest share in 2024”

Infrastructure represents the second-largest end-use sector within the tower crane rental market. Key drivers of growth include the rising demand for tower cranes in major infrastructure projects, such as roads, bridges, airports, and railways. These cranes are specifically engineered to optimize lifting capacity, reach, and operational flexibility, making them indispensable for hoisting heavy materials on complex construction sites.

Furthermore, the rental market is experiencing an upward trend, fueled by increased capital investments from government entities in public infrastructure, particularly in emerging economies, alongside broader global urbanization trends. The preference for asset rental over ownership offers significant advantages, including enhanced flexibility and cost efficiency. Additionally, renting a tower crane ensures predictable delivery timelines and costs, aligning with the financial and scheduling demands of construction projects.

“North America to be second-largest market during review period”

North America is anticipated to remain the second-largest global tower crane rental market. The region’s construction activity, predominantly fueled by commercial real estate developments, infrastructure renewal, and residential projects, is driving substantial demand for rental cranes. Additionally, large-scale urban redevelopment initiatives, highway upgrades, and renewable energy projects are further propelling market growth.

The trend toward renting heavy equipment instead of ownership is gaining traction due to its cost-effectiveness, reduced maintenance responsibilities, and adaptability to project-specific needs. Moreover, the presence of well-established rental firms, enhanced safety regulations, and the integration of technologically advanced crane systems significantly bolster North America’s competitive positioning in the market.

By Company Type: Tier 1: 25%, Tier 2: 42%, and Tier 3: 33%

By Designation: C-level Executives: 20%, Directors: 30%, and Other Designations: 50%

By Region: North America: 20%, Europe: 10%, Asia Pacific: 40%, South America: 10%, and Middle East & Africa 20%

Notes: Other designations include sales, marketing, and product managers.

Tier 1: >USD 1 Billion; Tier 2: USD 500 million–1 Billion; and Tier 3: 500 tons)), end-use industry (building & construction, infrastructure, energy & power, marine & offshore, and other end-use industries), and region (Asia Pacific, North America, Europe, South America, and Middle East & Africa). The report's scope covers detailed information regarding the drivers, restraints, challenges, and opportunities influencing the growth of the tower crane rental market. A detailed analysis of the key industry players has been done to provide insights into their business overview, products offered, and key strategies, such as partnerships, agreements, product launches, expansions, and acquisitions, associated with the tower crane rental market. This report covers a competitive analysis of upcoming startups in the tower crane rental market ecosystem.

#### Reasons to Buy Report

The report will offer the market leaders/new entrants with information on the closest approximations of the revenue numbers for the overall tower crane rental market and the subsegments. This report will help stakeholders understand the competitive landscape, gain more insights into positioning their businesses better, and plan suitable go-to-market strategies. The report will help stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following points:

Analysis of key drivers (Growth in construction and infrastructure projects and Rising emphasis on smart city developments), restraints (Preference for old cranes by tower crane rental companies, Price wars, reduced profit margins, and financial constraints for new entrants), opportunities (Increasing requirement for installation and maintenance of wind turbines and Technological advancements and digitalization of equipment), and challenges (High maintenance and operating costs and Lack of skilled labor force and maintenance & repair-related issues).

Product Development/Innovation: Detailed insights into upcoming technologies,

research & development activities, and product & service launches in the tower crane rental market.

**Market Development:** Comprehensive information about profitable markets – the report analyzes the tower crane rental market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the tower crane rental market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players such as Liebherr AG (Germany), Bigge Crane and Rigging Co. (US), ACE Construction Equipment Ltd. (India), Leavitt Cranes (Canada), Wasel GmbH (Germany), Falcon Tower Crane Services Ltd. (UK), Rapicon Inc. (Canada), NFT Group (UAE), Skycrane (Canada), and Maxim Crane Works (US).

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