

CONSTRUCTION MACHINERY EXPORTS HOLD STEADY DESPITE CURRENT UNCERTAINTIES

Italian exports in the sector held firm at 3.2 billion euros in 2025 (-0.5%). Growth in earthmoving is supporting the sector, while global uncertainties and less dynamic demand are having a negative impact. Positive signals from several international markets.

Verona, 24 March 2026 – Italian construction machinery exports posted a total value in 2025 of approximately 3 billion 226 million euros, recording a slight downturn of 0.5% compared to the previous year. These results confirm the general stability of the sector, despite the challenges of international markets, global economic uncertainties, and trade tensions that continue to impact exports negatively. These details emerged from analysis of data in the third International Trade Report-2026 prepared by Unacea (Italian Construction Machinery Union) in collaboration with CER (European Research Centre). "Notwithstanding the complex international context," said Luca Nutarelli, Director of Unacea, "the construction machinery sector has demonstrated significant stability. Exports held firm, driven especially by earthmoving machinery, thereby confirming our sector's ability to tackle global challenges. This result highlights the strength of Made in Italy, backed up by technological innovation, a focus on sustainability, and targeted investments in new markets. Despite geopolitical uncertainties and fluctuating international demand, the sector continues to be a strategic driver for the Italian economy by combining quality, efficiency, and competitiveness in key international markets." The Italian construction equipment sector is a strategic segment within Italy's mechanical engineering industry and a key enabler for the infrastructural development and sustainable transition of the construction sector. It generates approximately 0.3% of Italy's GDP, with more than 21,000 machines sold on the market annually, providing around 85,000 jobs (including allied industries).

The scenario outlined by Unacea highlights variable trends on the main destination markets, with signs of resilience and growth in certain areas that help offset the difficulties experienced in other international contexts, still affected by geopolitical uncertainties, trade tensions, and less dynamic global demand than in previous years. In particular, the solidity of more mature markets is matched by dynamism of a number of expanding areas, where investments in infrastructure and development programs continue to support demand for construction machinery, confirming the ability of Italian companies to adapt to diversified and constantly evolving scenarios. Prospects for the sector, however, will depend on several key factors: from investments in infrastructure planned in Europe and major international markets, not the least in the light of economic recovery programmes and public development policies, to the technological transition towards increasingly efficient, safe, and sustainable machinery in line with the decarbonization and reduced environmental impact objectives. This is accompanied by expanding digitalization of construction sites and production processes that equally integrate innovative solutions that are progressively transforming the entire construction supply chain, while also improving its productivity, safety, and competitiveness on a global scale.

A closer look at product categories indicates that Italian exports posted heterogeneous dynamics last year. Earthmoving machinery and equipment are driving the sector, confirming their status as the most significant segment, with €1.55 billion in export sales, up 7.1% compared to 2024. Positive signals also come from tower cranes, posting 158.1 million euros (+3.2%), and road-building machinery, with 101.8 million euros (+3.6%). On the other hand, other segments in the supply chain posted downward trends: aggregate preparation machinery came to 633.3 million euros (-6.7%), drilling machinery to 485.6 million euros (-9.4%); concrete machinery posted exports worth 296.9 million euros (-9.8%). International markets where exports increased the most between January and December 2025 included Central and Eastern Europe, the Middle East, the United States, Brazil, North Africa, and other African countries. The balance of trade in the sector

in 2025 came to nearly 911 million euros, down by 14.1% compared to the previous year, confirming the continuing challenges on the international stage despite overall exports holding firm.

In this context, the 32nd SaMoTer International Triennial Construction Machinery Exhibition scheduled in Verona 6-9 May 2026 is a strategic event accompanying the sector in this period of transformation by offering a business and discussion platform embracing the main drivers of development: innovation, sustainability and digitization. With 6 show halls, 3 outdoor areas, and a total area of over 50,000 square metres, with more than 500 exhibitors already registered, the event (organized by Veronafiere in partnership with Unacea and Cece) confirms its calibre as a key European hub for companies, operators, and stakeholders across the entire construction industry: from earthmoving to hoisting/lifting, demolition and drilling, not to mention crushing and quarry/construction site vehicles, as well as concrete, the road-building sector, without overlooking equipment, engine components, spare parts, logistics, services and ICT solutions. This four-day event will turn Verona into the hub for a sector that significantly impacts employment, innovation, and infrastructure development. The exhibition will consequently not only showcase products but also emerge as an economic and industrial observatory capable of interpreting market dynamics and guiding the choices of the entire supply chain.