

# Used Equipment Market Trends Report

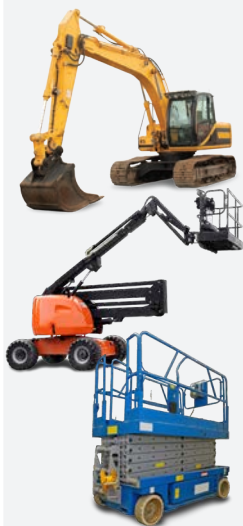
2<sup>nd</sup> quarter 2026

European edition

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## Market Trends Used Equipment in Europe

No two corners of Europe's used equipment market move at the same speed. A quarter that brings rising prices and shrinking supply in one category can bring the opposite in another, and behind every headline figure sits a more interesting question: what kind of machines are actually changing hands, who is buying them, and what are they willing to pay?

The Ritchie Bros. European Market Trends Report answers those questions from two vantage points. Listing and buyer enquiry data from Mascus, Europe's leading used equipment listing website, shows what is available and where demand is building; results from Ritchie Bros. online auctions across the region show what actually sold, at what price, and to whom. Read together, the two datasets reveal dynamics that neither could show on its own.

This edition examines Q2 2026 across five key equipment categories, Crawler Excavators, Boom Lifts, Scissor Lifts, Tractors, and Tractor Units, comparing supply, demand, pricing, machine quality, and buyer geography against the same period in 2025. It is written for the people who make decisions in this market: equipment owners weighing when to sell, fleet managers and dealers planning their next purchase, and investors tracking conditions across Europe's Construction, Access, Agriculture, and Transport sectors.

Market observations in this report reflect conditions recorded during Q2 2026 and should be read as an indicator of current trends rather than a forecast of future performance.

### Crawler Excavators

After the strong price recovery of Q1, the crawler excavator market spent the second quarter consolidating its gains. Median auction prices at Ritchie Bros. came in at €28,980 - essentially level with the €28,704 recorded in Q2 2025 - while the machines clearing the market were unchanged in median age at eight years but lower in hours. Buyers paid the same money for fresher machines - a quiet but genuine improvement in value terms - and they bought more of them, with auction sales up 14% year-on-year.

On the listing side, Mascus supply was down 14% in Q2 2026 compared to Q2 2025 as the market continued to absorb available stock, while buyer enquiries softened a gentler 6%. A market where supply is contracting faster than demand, prices are holding, and machine quality is improving points to a channel in healthy balance rather than one under pressure. Caterpillar remained the most sought-after brand on Mascus, ahead of Volvo and Hitachi, with buyer interest led by the UK, the Netherlands, and Sweden. At auction, Caterpillar topped the volume rankings for the second year running, ahead of Hitachi and Volvo - while the UK held the number one buyer position, followed by Belgium and Spain.

### Boom Lifts

Boom lifts delivered one of the clearest positive price stories of Q2 2026. Median prices at Ritchie Bros. auctions rose 10% year-on-year, even as sales volumes eased 7% against a strong prior-year comparison - fewer machines sold, but at noticeably better money. That combination reads as a moderation in quantity rather than any weakening in appetite for quality access equipment.

Mascus supply was up 3% in Q2 2026 compared to Q2 2025 - one of only two categories in this report to show a year-on-year supply increase, reflecting stable, consistent inventory in the access segment. Buyer enquiries had a more uneven quarter, finishing 6% below Q2 2025. Genie ranked as the most in-demand brand on Mascus, narrowly ahead of JLG, with Haulotte completing the top three - while buyer activity was dominated by the Netherlands, followed by Germany and Poland. At auction, Genie and JLG swapped the top two positions, with Haulotte third in both years, and the geography barely moved: the Netherlands, Spain, and the UK held the top three buying positions in both years - the kind of consistency that reflects a settled, repeat-buyer market.



# Introduction

## Scissor Lifts

The scissor lift segment showed the most unambiguous demand-led price strength in this report. Median auction prices rose 13% in Q2 2026 - and unlike categories where price gains reflect fresher stock, this uplift came against machines that were a year older (median 12 years vs 11) and higher-hours (507 h vs 433 h). Buyers paid more for older equipment; there is no compositional explanation for that, only competition. Auction sales volumes were 17% below Q2 2025's level, placing the constraint firmly on the supply side rather than with buyer appetite.

That reading is reinforced on Mascus, where buyer enquiries jumped 24% in Q2 2026 compared to Q2 2025 - the largest demand increase of any category in this report - while supply edged up just 1%, keeping inventory effectively stable. Genie led brand demand on Mascus, followed by JLG and Haulotte, with buyer activity strongest in the Netherlands and Germany, and Spain completing the top three. At auction, Skyjack climbed from third to first by volume, with Haulotte second and Genie entering the top three, while the Netherlands, Spain, and Italy led the buying countries.

## Tractors

After a difficult Q1 marked by a 17% price fall on older, higher-hour stock, the used tractor market found firmer footing in Q2 2026. Median auction prices came in at €26,988 - just 3% below the €27,924 recorded in Q2 2025, a decline within normal compositional variance - while median age held at eleven years and median usage slightly improved. Stable prices on stable machines are exactly what a market looks like when it has finished absorbing a difficult vintage of supply. Auction sales volumes were 7% lower than the prior year, and Italy overtook Spain as the leading buyer country, with France and the Netherlands behind — though around 60% of machines were sold to local buyers.

The bigger structural story remains on the supply side. Mascus listings fell 19% in Q2 2026 compared to Q2 2025, extending the contraction identified in the Q1 report, while demand enquiries tracked 8% below the prior year. John Deere retained its position as the most in-demand brand on Mascus, with New Holland and Massey Ferguson completing the top three, and buyer activity was strongest in Sweden, followed by Germany and Poland — though Finland and the Netherlands were close behind. At auction, John Deere and New Holland held the top two volume positions in both years, with compact tractors accounting for a growing share of transactional volumes. The challenge heading into the second half is whether the right machines - in age, specification, and price point - come to market to meet the demand that is clearly there.

## Tractor Units

The used Tractor Unit market told the most dramatic story in this report. Median auction prices held almost exactly flat in Q2 2026 at €9,996, compared to €9,973 in Q2 2025, on Tractor Units of unchanged median age but higher mileage — 668,583 km against 631,558 km. Auction sales volumes, however, were 31% below the prior year, and the explanation sits squarely on the supply side rather than with demand. Scania moved to the top of the volume rankings, displacing Mercedes-Benz to second, with DAF holding third in both years - while Spain remained the leading buyer country, France rose to second, and Romania entered the top five, continuing the pattern of eastward expansion in secondary transport equipment activity. Even against that cross-border backdrop, around 57% of units were sold to local buyers, a reminder that domestic trade still underpins the segment.

The supply picture explains the volume shortfall. Mascus listings fell 26% in Q2 2026 compared to Q2 2025 - the steepest contraction across any category in this report - while buyer enquiries surged 72%, the strongest demand growth in this report, with the whole quarter running well ahead of the prior year. A market where available stock is shrinking by a quarter while enquiry volumes grow by nearly three-quarters is one where competition for good units is intensifying rapidly. Volvo ranked as the most in-demand brand on Mascus, narrowly ahead of Scania, with Mercedes-Benz completing the top three - while buyer activity was led by the Netherlands, Hungary, and Sweden. Whether that gap narrows will depend on stock returning to the market; until it does, competition for available trucks looks set to stay fierce.





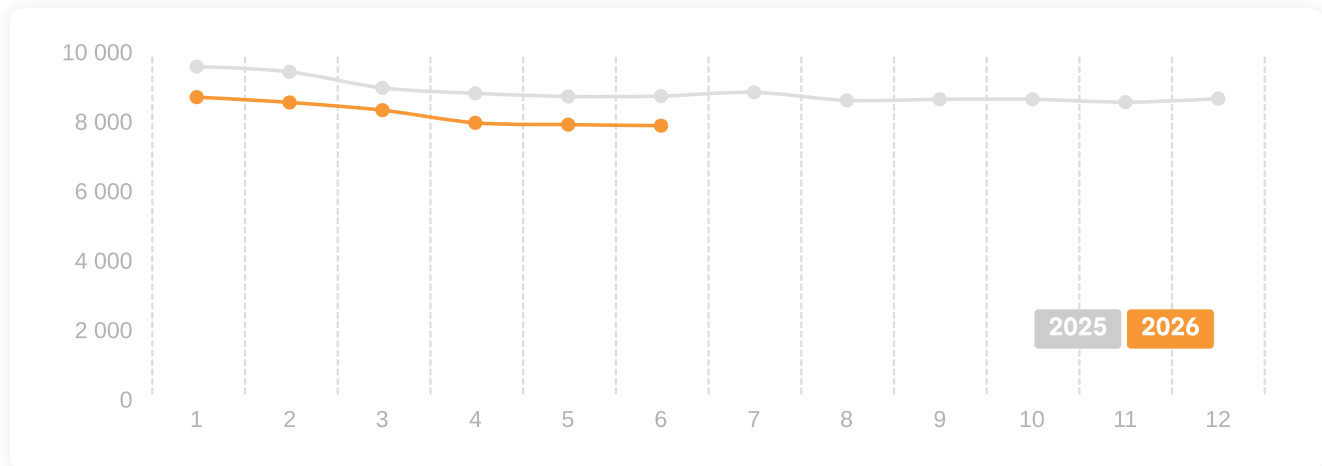
# Crawler Excavators

## Crawler Excavators

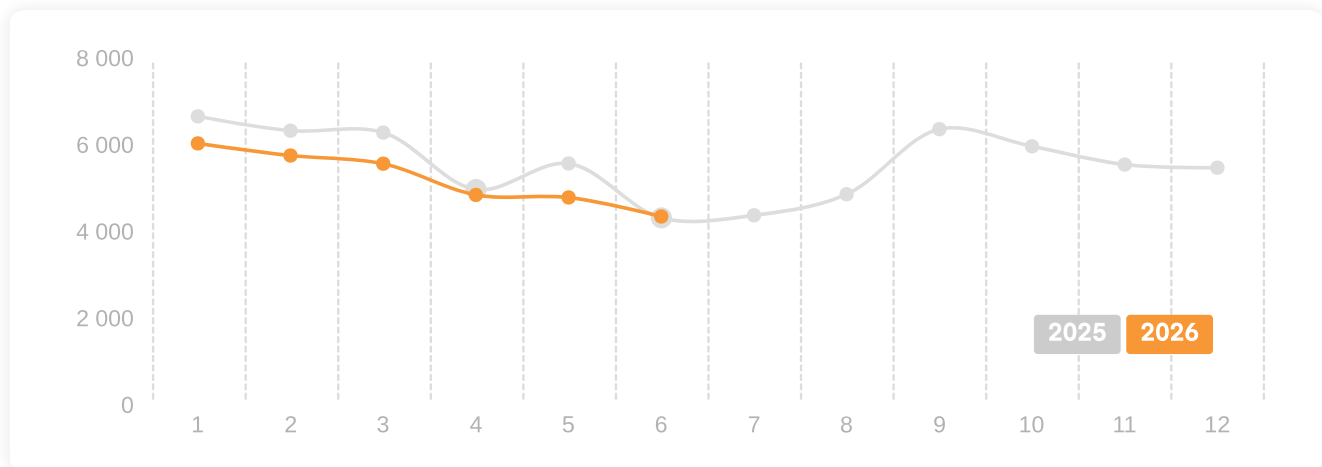
The average volume of crawler excavators listed for sale on Mascus was down 14% in Q2 2026 compared to the same period last year, with the 2026 line tracking consistently below 2025 across the quarter as the market continues to absorb available stock.

Demand followed a gentler slope, down 6% year-on-year. Caterpillar remained the brand buyers inquired for most, with Volvo and Hitachi completing the top three, and interest stayed concentrated in Northern and Western Europe - the UK leading, followed by the Netherlands and Sweden.

### Number of units listed for sale on Mascus in Europe

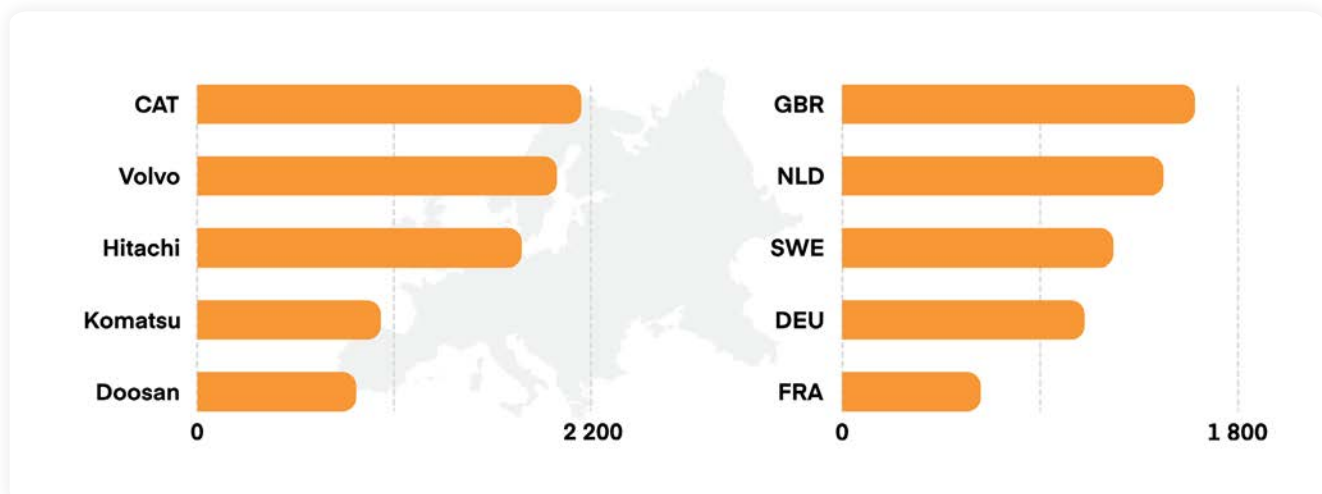


### Demand on Mascus - buying enquiries (emails, phone calls) to sellers



### Top 5 – Most wanted brands | Most active purchasing by country

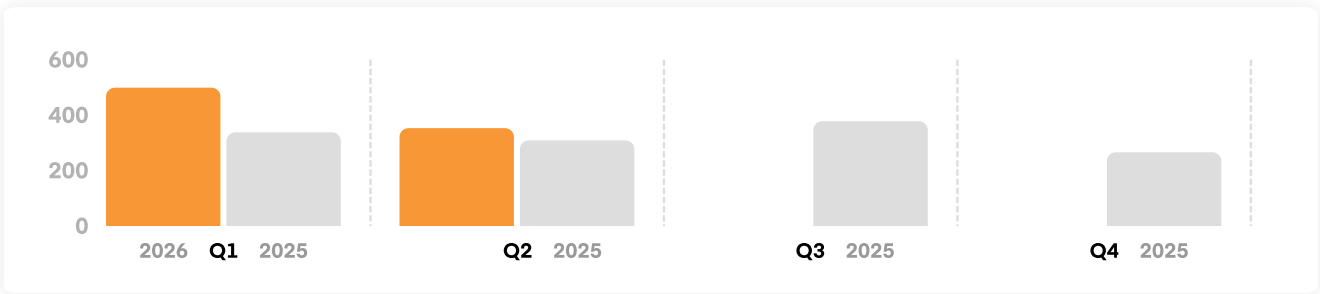
Based on the number of buying enquiries (emails, phone calls) to sellers



Crawler Excavators

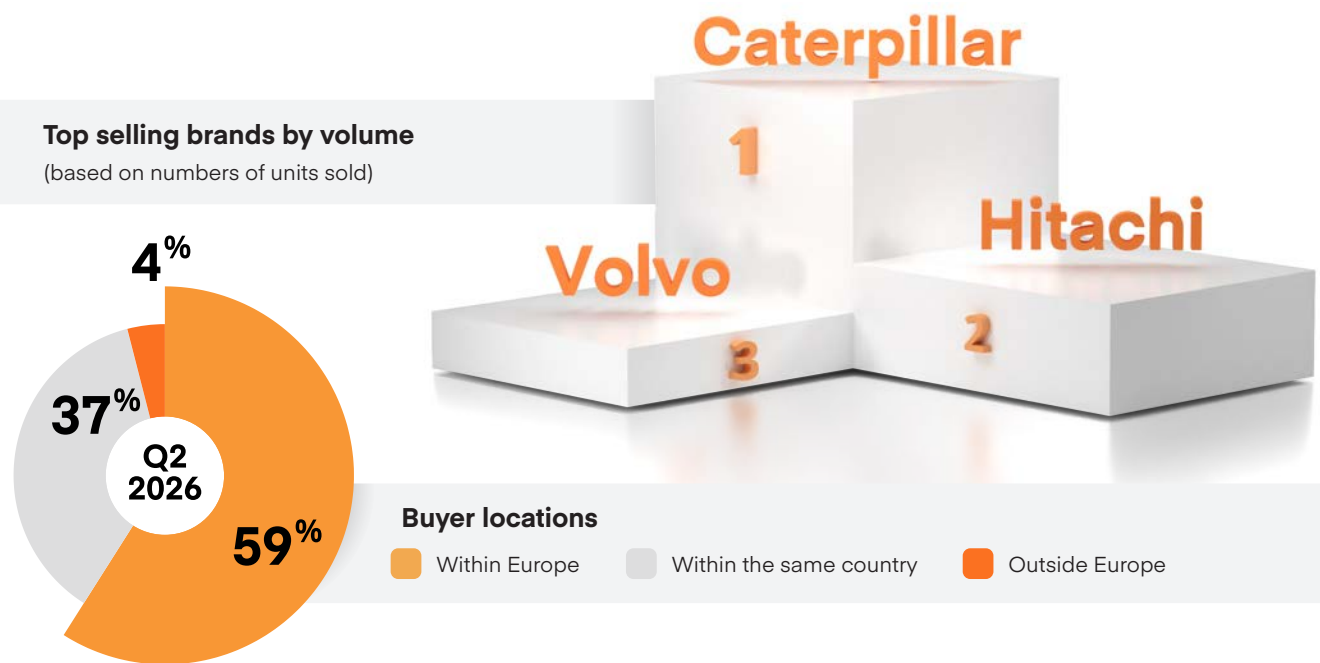
Median pricing for crawler excavators at Ritchie Bros. auctions was essentially stable in Q2 2026 at €28,980, compared to €28,704 in Q2 2025 - a rise of 1% - while auction sales climbed 14% year-on-year: more machines changing hands at steady money. Caterpillar topped the volume rankings for the second year running, ahead of Hitachi and Volvo. The machines transacting were unchanged in median age at eight years but lower in hours, pointing to improved supply quality entering the auction channel at stable prices. The most popular model was the Caterpillar 306 mini excavator, with 9 units sold at a median price of €5,977. The top buying countries were the UK, Belgium, and Spain.

Number of units sold by Ritchie Bros. in Europe



|                                                         | Q2 2025                                                                       | Q2 2026                                                                        |
|---------------------------------------------------------|-------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| *Median price                                           | € 28 704                                                                      | € 28 980                                                                       |
| *Median age                                             | 8 years                                                                       | 8 years                                                                        |
| *Median usage                                           | 6 548 h                                                                       | 5 860 h                                                                        |
| Top buyer locations<br>(based on numbers of units sold) | 1. United Kingdom<br>2. Spain<br>3. The Netherlands<br>4. Italy<br>5. Belgium | 1. United Kingdom<br>2. Belgium<br>3. Spain<br>4. The Netherlands<br>5. France |

\* The median represents the middle value of a dataset, when all of the values are arranged from smallest to largest.





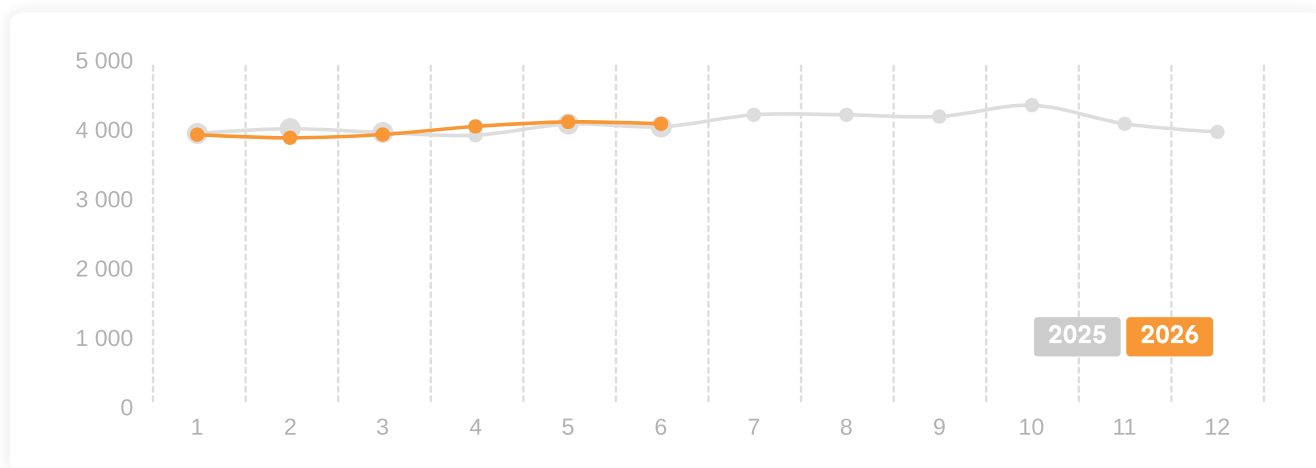
# Boom Lifts

## Boom Lifts

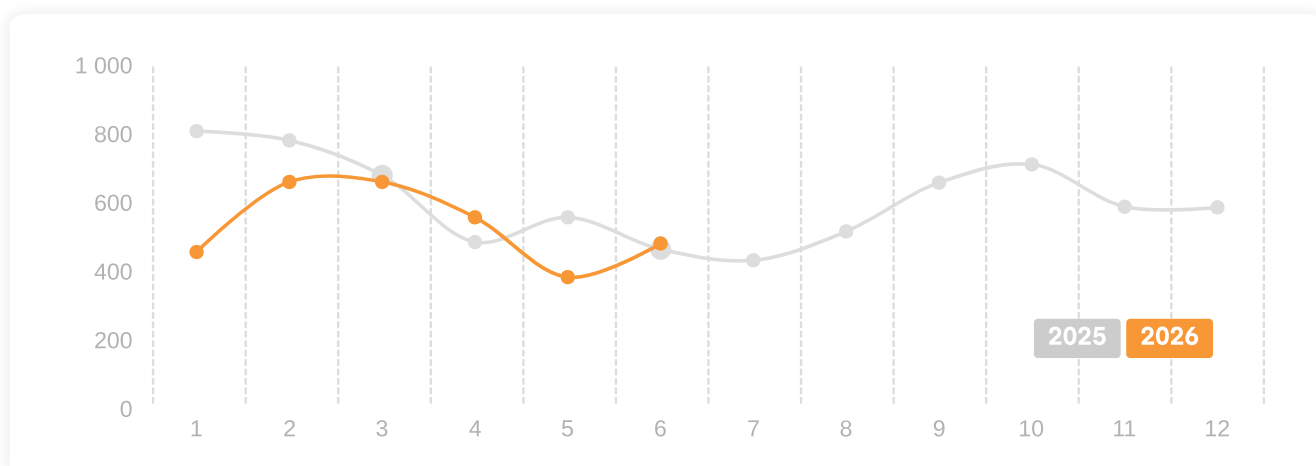
Boom lift listings on Mascus rose 3% in Q2 2026 compared to the same period last year - one of only two categories in this report to show a year-on-year supply increase, and a sign of stable, consistent inventory in the access segment.

Demand had a more uneven quarter, finishing 6% below Q2 2025. Genie was the most in-demand brand, narrowly ahead of JLG, with Haulotte completing the top three, while buyer activity was dominated by the Netherlands, followed by Germany and Poland.

### Number of units listed for sale on Mascus in Europe

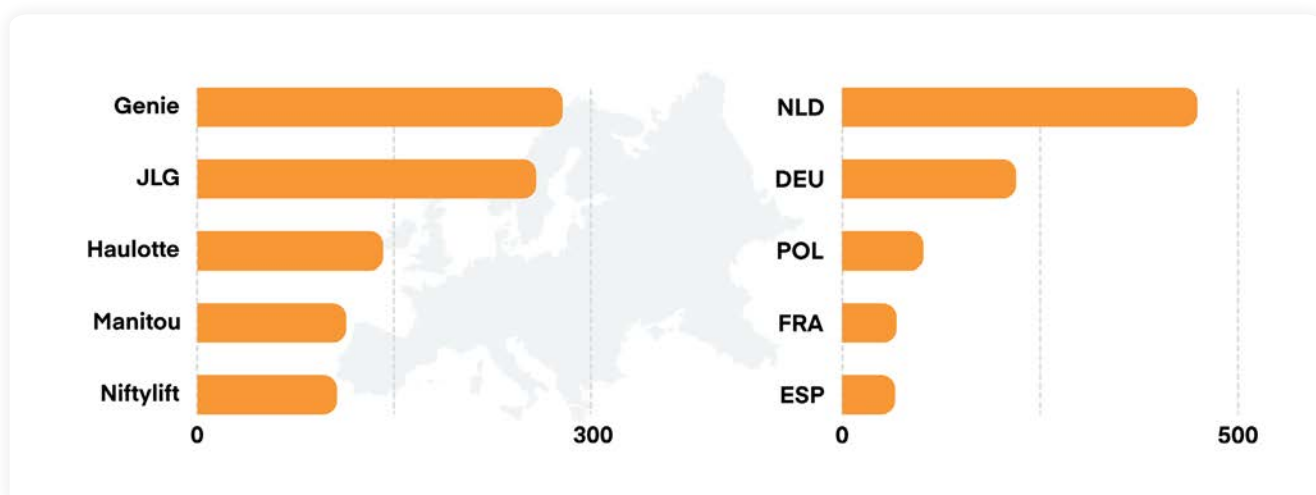


### Demand on Mascus - buying enquiries (emails, phone calls) to sellers



### Top 5 – Most wanted brands | Most active purchasing by country

Based on the number of buying enquiries (emails, phone calls) to sellers

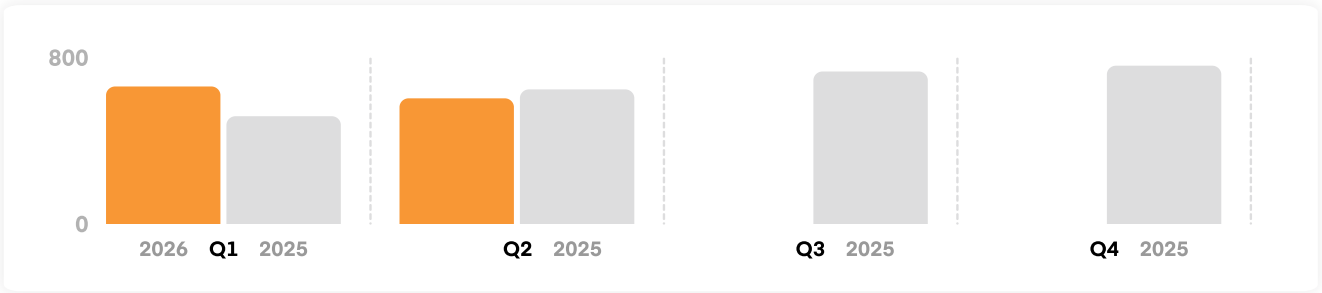


## Boom Lifts

Median pricing for boom lifts at Ritchie Bros. auctions rose 10% in Q2 2026, even as sales volumes eased 7% against a strong prior-year comparison - fewer machines sold, but at noticeably better money.

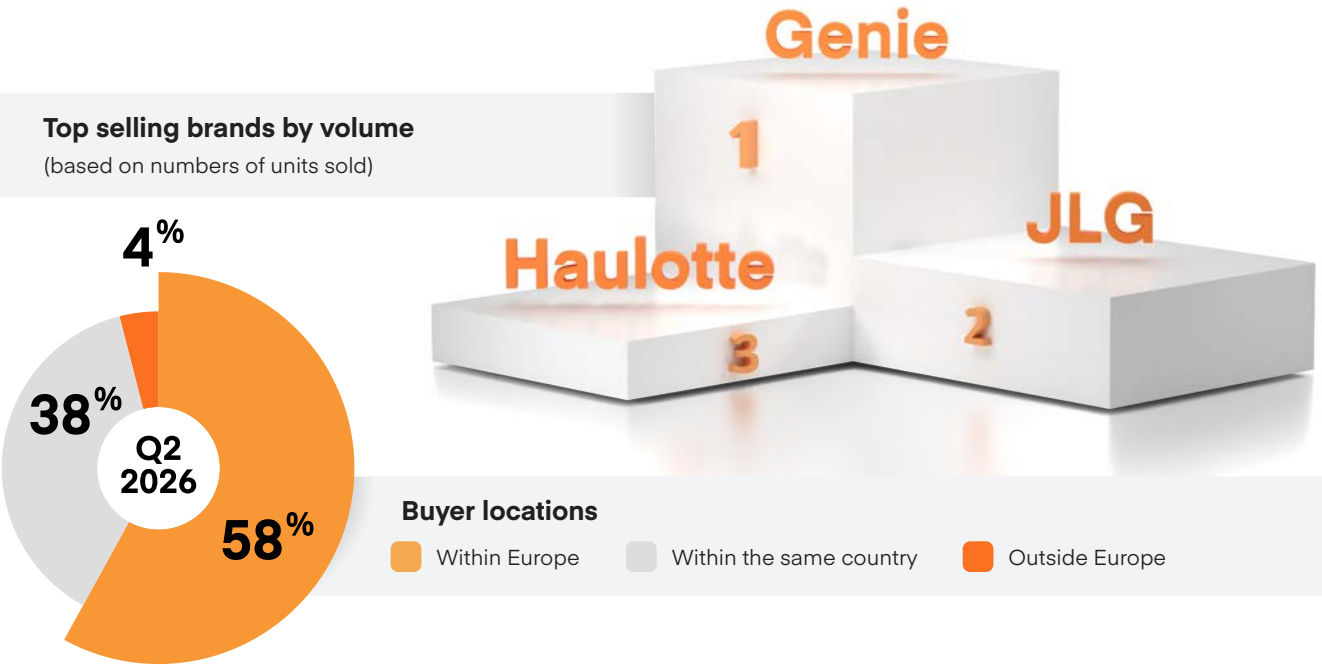
Genie moved to the top spot by units sold, swapping positions with JLG, while Haulotte held third in both years. The geography barely moved: the Netherlands, Spain, and the UK occupied the top three buying positions in both years. The most popular model was the JLG Toucan 10E, with 17 units sold at a median price of €3,249.

### Number of units sold by Ritchie Bros. in Europe



|                                                         | Q2 2025                                                                      | Q2 2026                                                                      |
|---------------------------------------------------------|------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| *Median price                                           | € 9 185                                                                      | € 10 140                                                                     |
| *Median age                                             | 13 years                                                                     | 12 years                                                                     |
| *Median usage                                           | 1 945 h                                                                      | 2 323 h                                                                      |
| Top buyer locations<br>(based on numbers of units sold) | 1. The Netherlands<br>2. Spain<br>3. United Kingdom<br>4. Italy<br>5. Poland | 1. The Netherlands<br>2. Spain<br>3. United Kingdom<br>4. Poland<br>5. Italy |

\* The median represents the middle value of a dataset, when all of the values are arranged from smallest to largest.





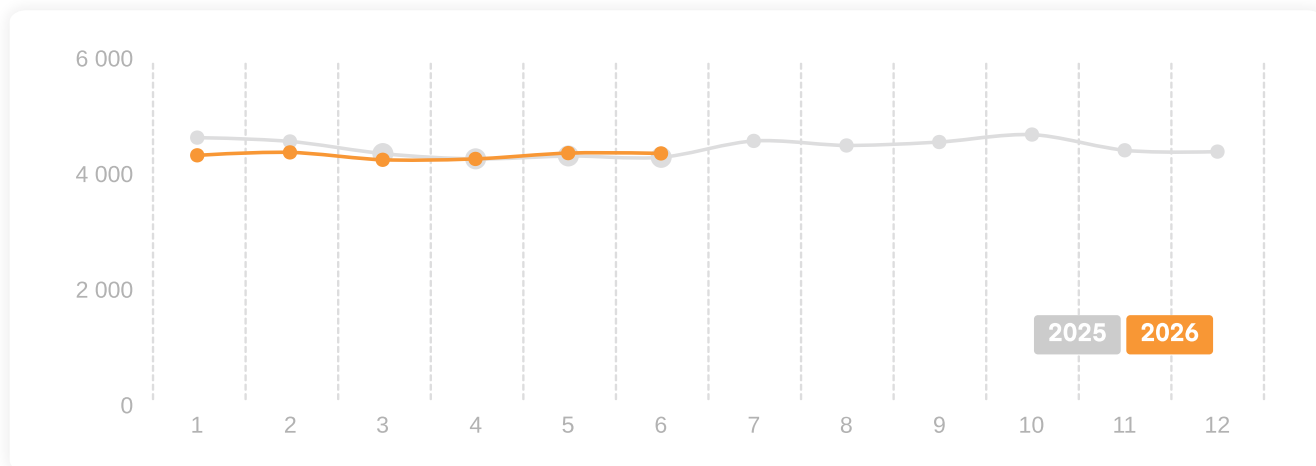
# Scissor Lifts

## Scissor Lifts

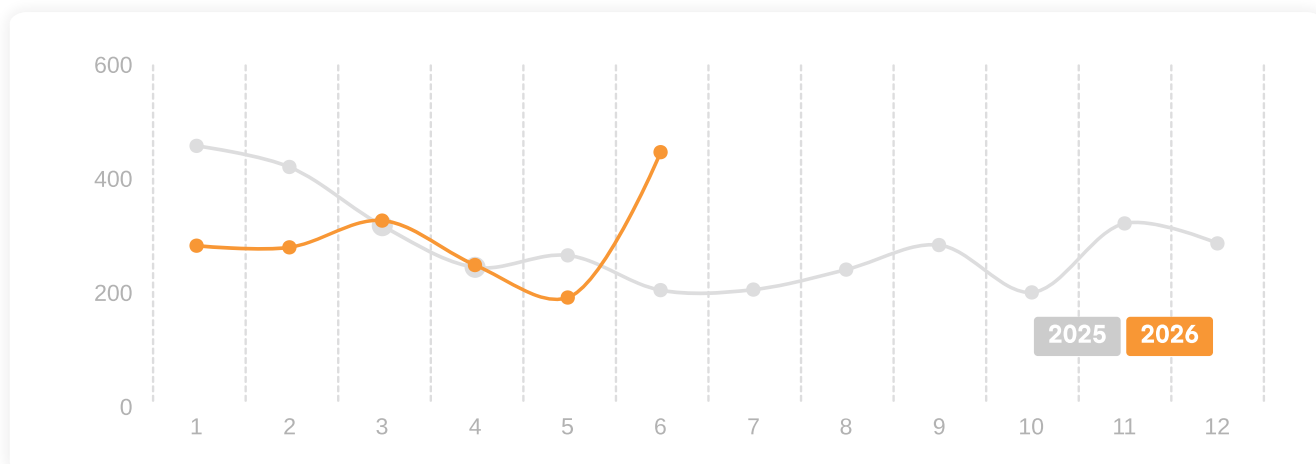
Scissor lift listings on Mascus edged up 1% in Q2 2026 compared to the same period last year, keeping the category's inventory effectively stable.

Demand was another story entirely - up 24% versus Q2 2025. Genie led brand interest, followed by JLG and Haulotte, with buyer activity strongest in the Netherlands and Germany, and Spain completing the top three.

### Number of units listed for sale on Mascus in Europe

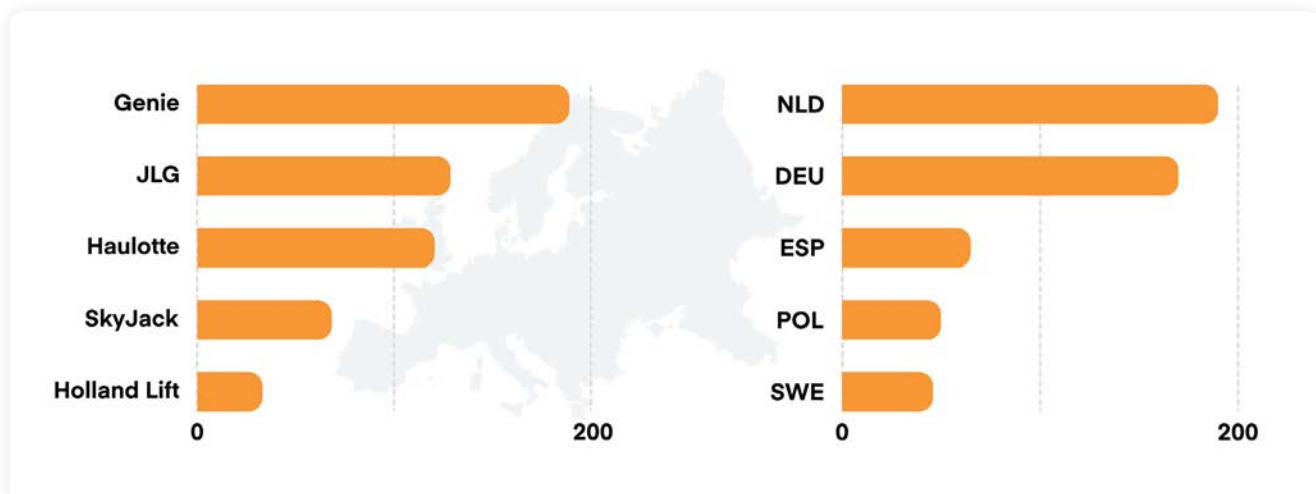


### Demand on Mascus - buying enquiries (emails, phone calls) to sellers



### Top 5 - Most wanted brands | Most active purchasing by country

Based on the number of buying enquiries (emails, phone calls) to sellers

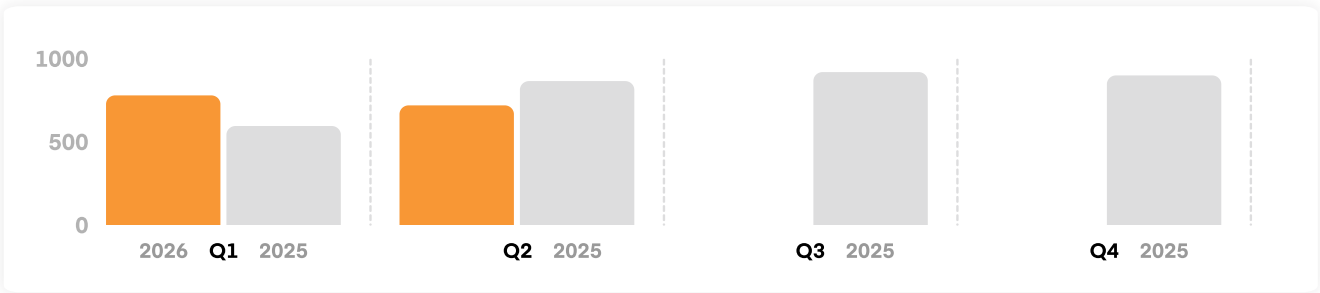


## Scissor Lifts

The median price for scissor lifts sold at Ritchie Bros. auctions rose 13% in Q2 2026 - and notably, on machines that were a year older (median 12 years vs 11) and higher-hours (507 h vs 433 h). Buyers paying more for older equipment is a clear signal of demand-led price strength rather than a compositional effect. Sales volumes came in 17% below the prior year, suggesting the constraint sits on the supply side.

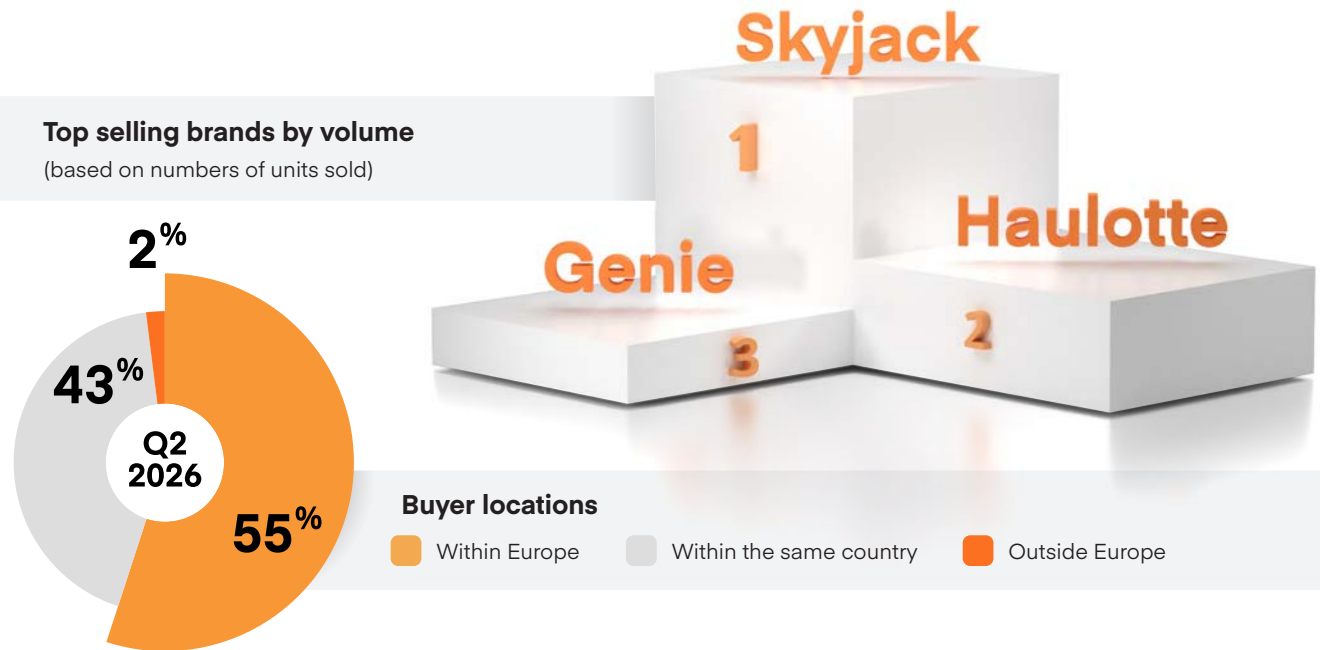
Skyjack climbed from third to first by units sold, ahead of Haulotte, with Genie entering the top three. The Netherlands, Spain, and Italy were the top three buying countries. The most popular model was the Skyjack SJIII4632, with 34 units sold at a median price of €1,507.

### Number of units sold by Ritchie Bros. in Europe



|                                                         | Q2 2025                                                                       | Q2 2026                                                                       |
|---------------------------------------------------------|-------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| *Median price                                           | € 1 870                                                                       | € 2 106                                                                       |
| *Median age                                             | 11 years                                                                      | 12 years                                                                      |
| *Median usage                                           | 433 h                                                                         | 507 h                                                                         |
| Top buyer locations<br>(based on numbers of units sold) | 1. The Netherlands<br>2. Spain<br>3. Italy<br>4. United Kingdom<br>5. Romania | 1. The Netherlands<br>2. Spain<br>3. Italy<br>4. United Kingdom<br>5. Belgium |

\* The median represents the middle value of a dataset, when all of the values are arranged from smallest to largest.





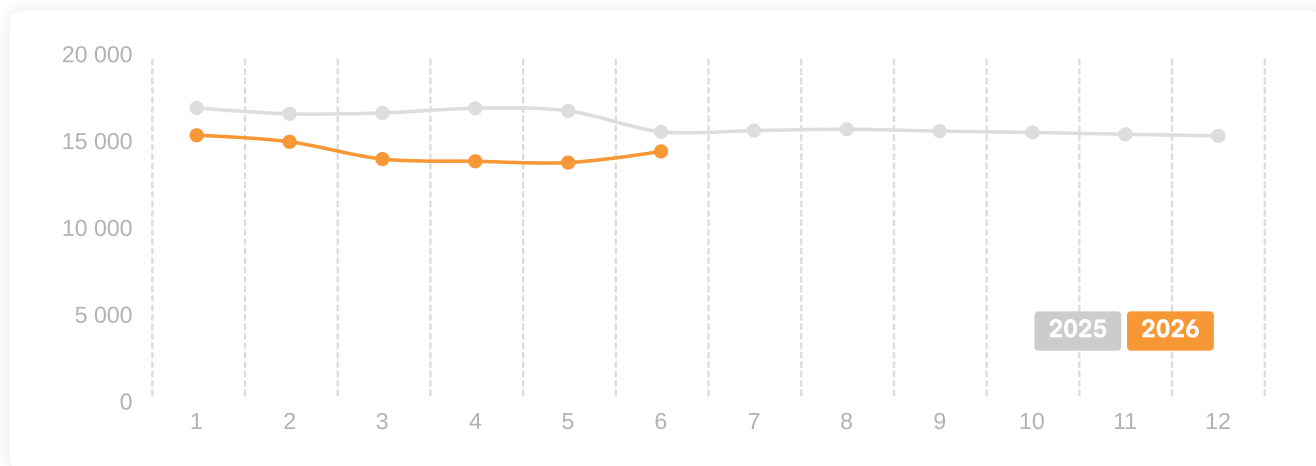
# Tractors

## Tractors

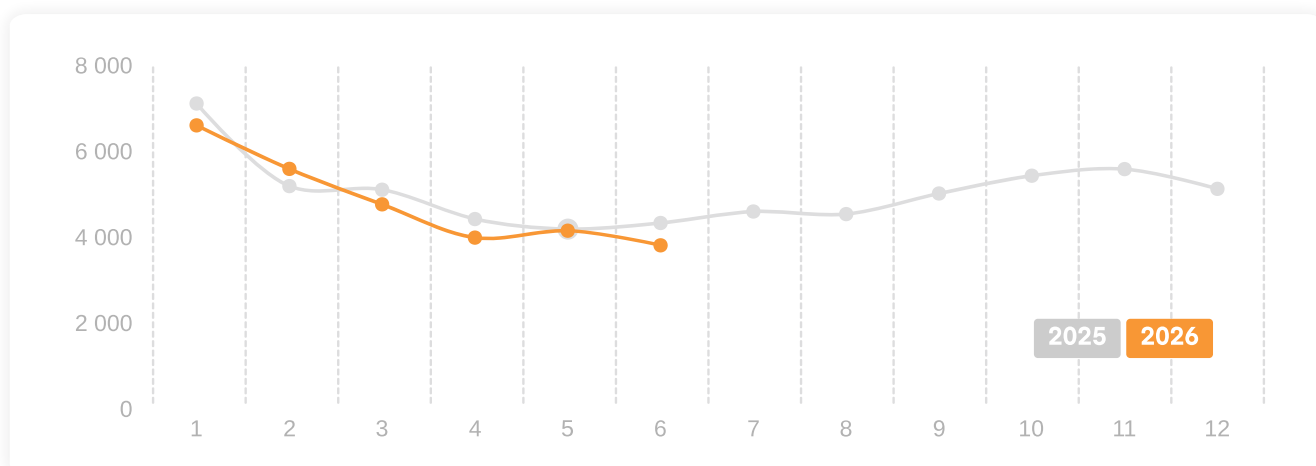
Tractor listings on Mascus were down 19% in Q2 2026 compared to the same period last year, extending the supply contraction identified in Q1.

Demand tracked 8% below Q2 2025. John Deere held its position as the most in-demand brand, ahead of New Holland and Massey Ferguson, while buyer activity was strongest in Sweden, followed by Germany, with Poland completing the top three — though Finland and the Netherlands were close behind, pointing to broad-based demand across Northern Europe.

### Number of units listed for sale on Mascus in Europe

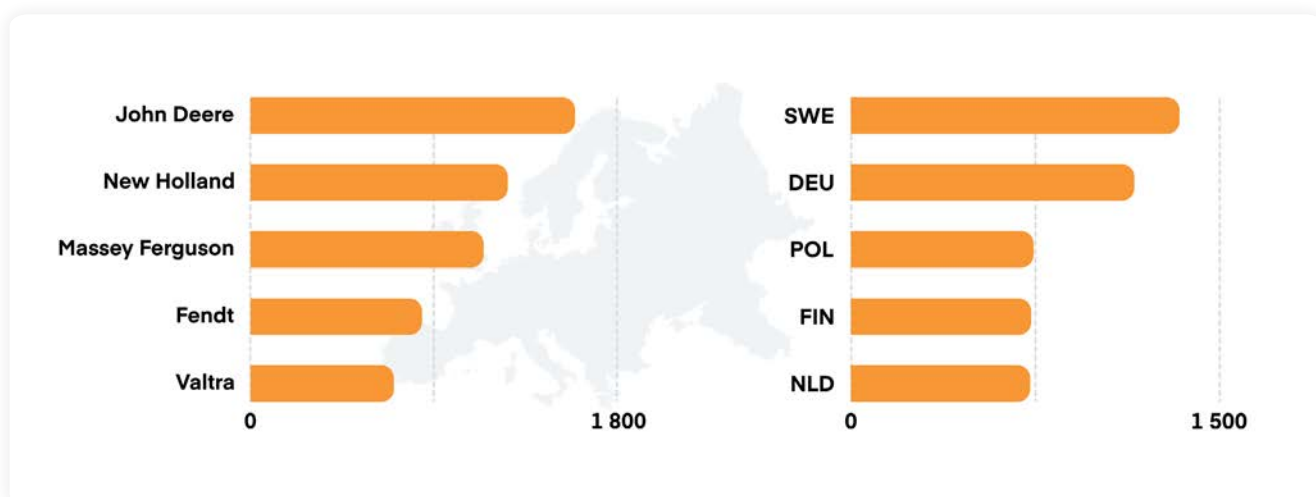


### Demand on Mascus - buying enquiries (emails, phone calls) to sellers



### Top 5 – Most wanted brands | Most active purchasing by country

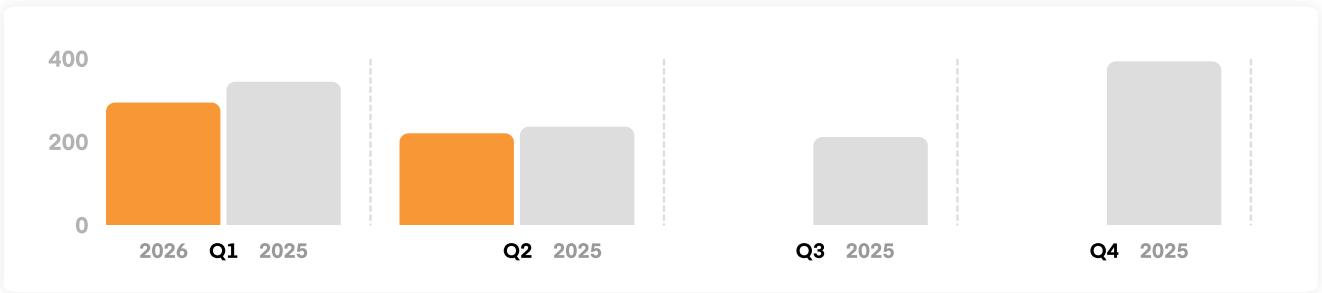
Based on the number of buying enquiries (emails, phone calls) to sellers



Tractors

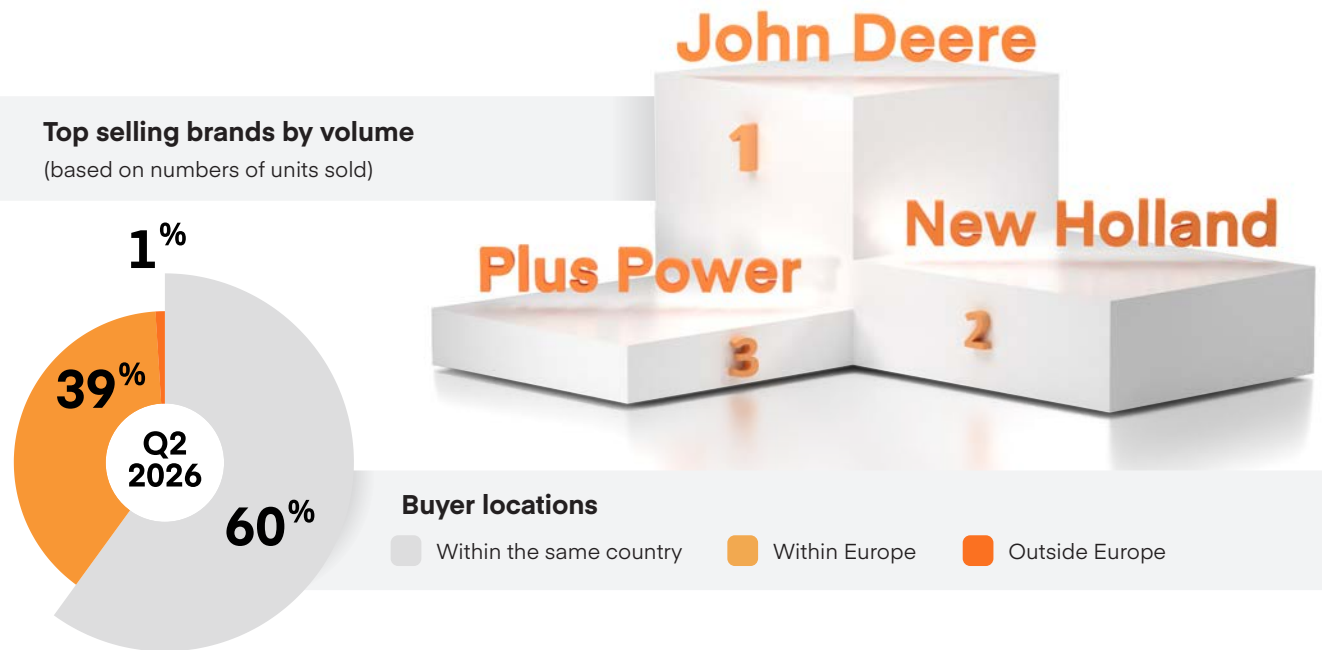
The median price for tractors sold at Ritchie Bros. auctions was broadly stable in Q2 2026 at €26,988, compared to €27,924 in Q2 2025 - a decline of just 3% that marks a clear stabilisation after Q1's sharper correction. Median age was unchanged at 11 years, median usage slightly improved, and sales volumes came in 7% below the prior year. John Deere and New Holland held the top two positions by units sold in both years. Italy overtook Spain as the leading buyer country, with France and the Netherlands behind — though around 60% of machines were sold to buyers in their own market, underlining how much of the tractor trade remains locally rooted. The most popular model was the Plus Power TT604, with 18 units sold at a median price of €5,230 - a reflection of the growing weight of the compact tractor segment in transactional volumes.

Number of units sold by Ritchie Bros. in Europe



|                                                         | Q2 2025                                                                | Q2 2026                                                              |
|---------------------------------------------------------|------------------------------------------------------------------------|----------------------------------------------------------------------|
| *Median price                                           | € 27 924                                                               | € 26 988                                                             |
| *Median age                                             | 11 years                                                               | 11 years                                                             |
| *Median usage                                           | 5 982 h                                                                | 5 642 h                                                              |
| Top buyer locations<br>(based on numbers of units sold) | 1. Spain<br>2. Germany<br>3. Poland<br>4. The Netherlands<br>5. France | 1. Italy<br>2. Spain<br>3. France<br>4. The Netherlands<br>5. Poland |

\* The median represents the middle value of a dataset, when all of the values are arranged from smallest to largest.





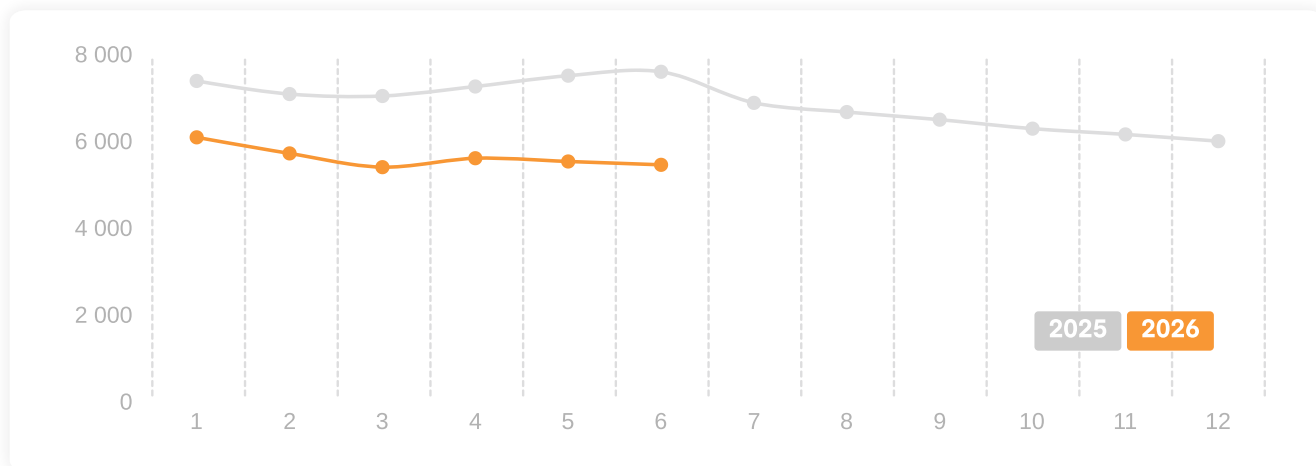
# Tractor Units

## Tractor Units

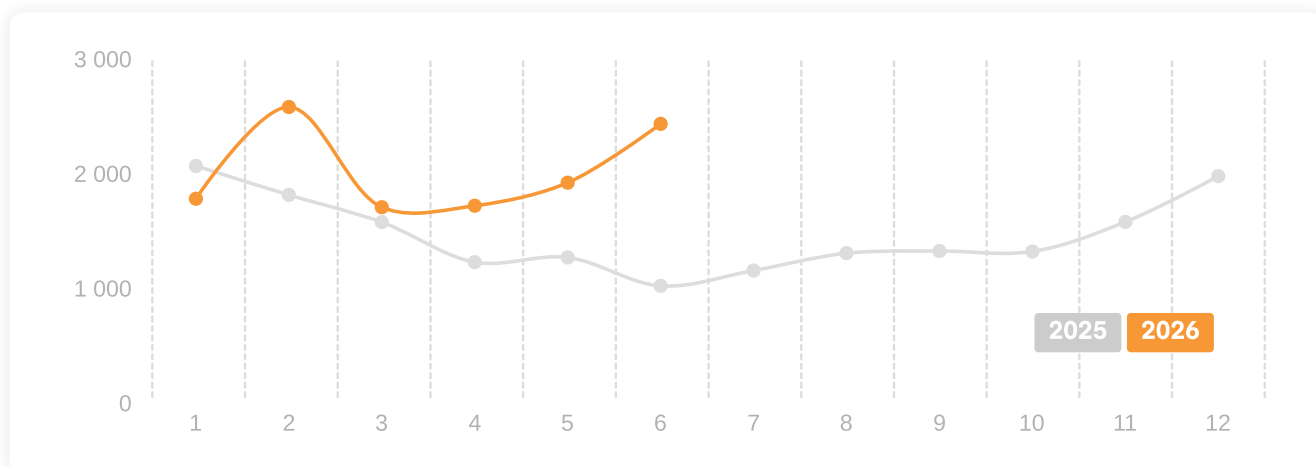
Tractor Units listings on Mascus fell sharply in Q2 2026 - down 26% compared to the same period last year. This is the steepest supply contraction of any category in this report, and a significant structural tightening in market availability.

Demand moved emphatically the other way, up 72% - the strongest growth in this report, with the whole quarter running well ahead of the prior year. Volvo was the most in-demand brand, narrowly ahead of Scania, with Mercedes-Benz completing the top three, and buyer activity was led by the Netherlands, followed by Hungary and Sweden.

### Number of units listed for sale on Mascus in Europe

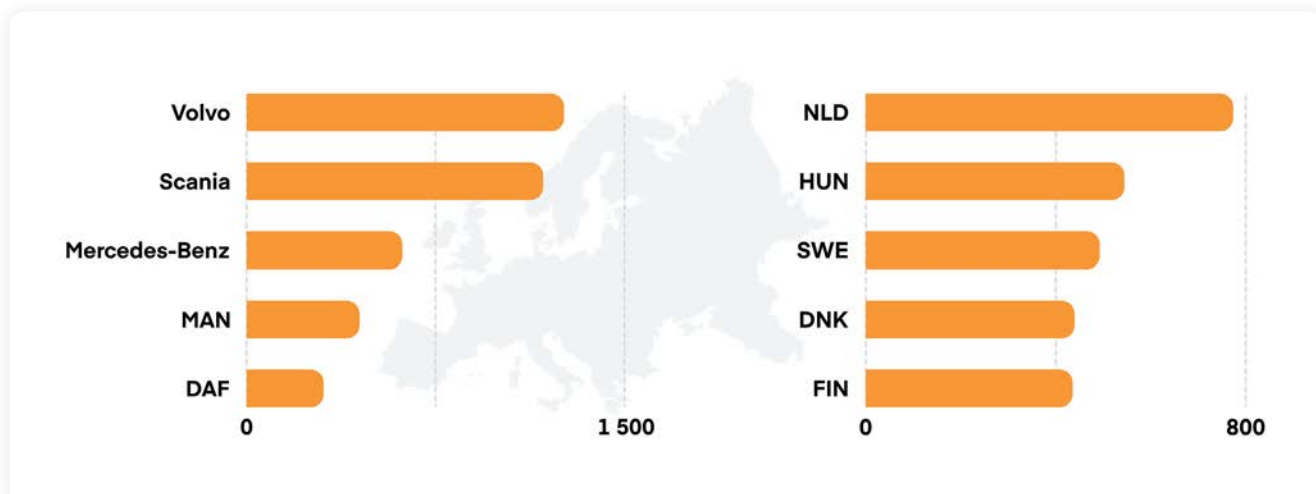


### Demand on Mascus - buying enquiries (emails, phone calls) to sellers



### Top 5 – Most wanted brands | Most active purchasing by country

Based on the number of buying enquiries (emails, phone calls) to sellers

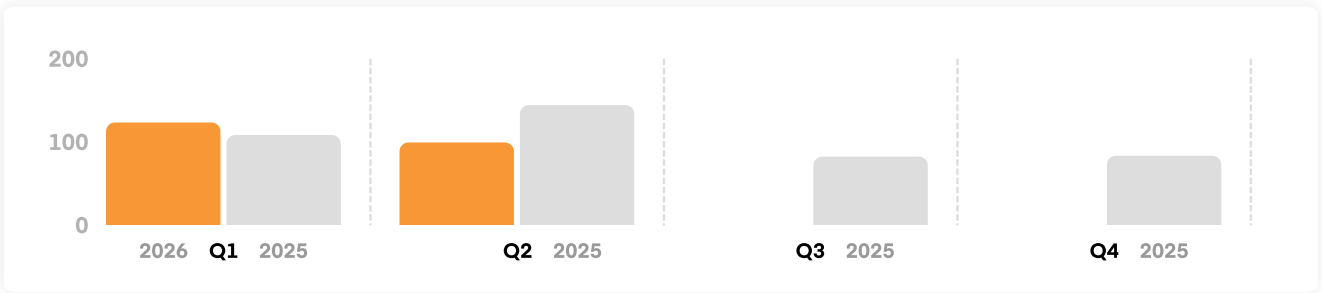


Tractor Units

The median price for tractor units sold at Ritchie Bros. auctions held almost exactly flat in Q2 2026 at €9,996, compared to €9,973 in Q2 2025, on tractor units of unchanged median age (10 years) but higher mileage - 668,583 km versus 631,558 km. Sales volumes were 31% below the prior year - consistent with the sharp contraction in available supply rather than any weakening of demand.

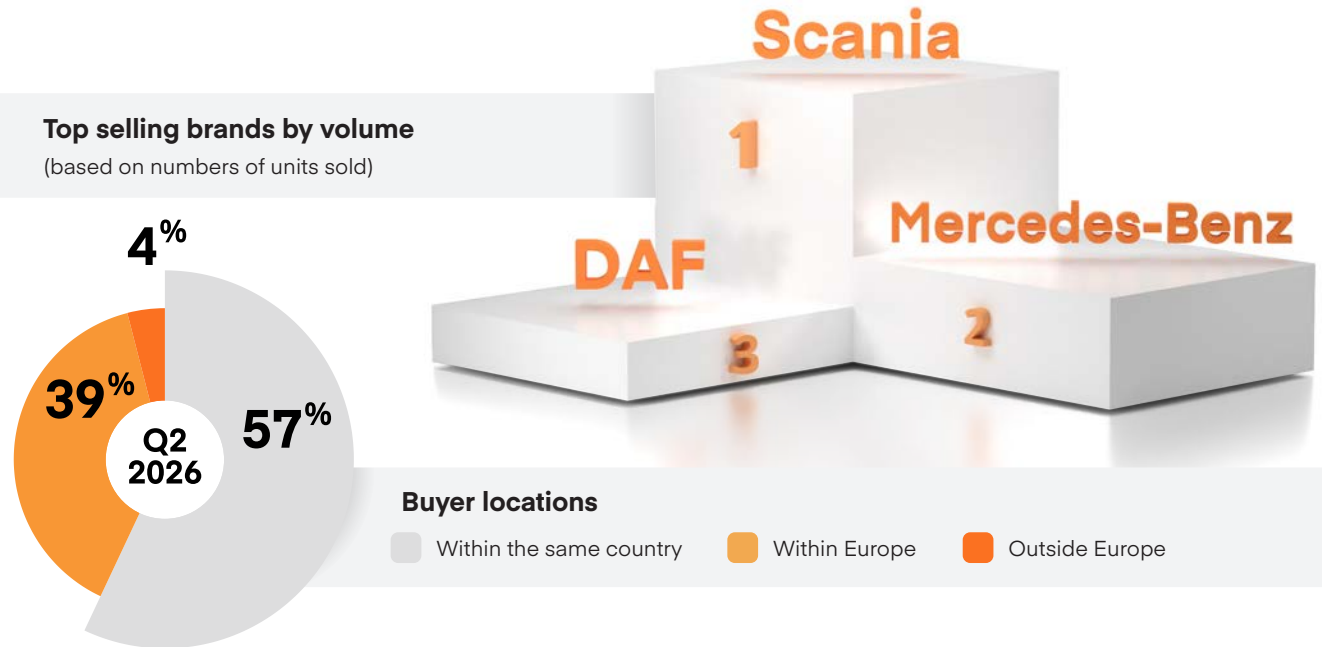
Scania moved to the top spot by units sold, displacing Mercedes-Benz to second, with DAF holding third in both years. Spain remained the leading buyer country, with France rising to second and the Netherlands closing out the top three; Romania entered the top five, replacing Hungary — a further sign of growing secondary market activity in Eastern Europe. Even so, around 57% of units were sold to buyers in their own market, showing that domestic trade still underpins the segment even as cross-border activity expands. The most popular models were the Mercedes-Benz Actros 1842 and the Scania G410, each with 6 units sold at median prices of €8,386 and €17,184 respectively.

Number of units sold by Ritchie Bros. in Europe



|                                                         | Q2 2025                                                                | Q2 2026                                                               |
|---------------------------------------------------------|------------------------------------------------------------------------|-----------------------------------------------------------------------|
| *Median price                                           | € 9 973                                                                | € 9 996                                                               |
| *Median age                                             | 10 years                                                               | 10 years                                                              |
| *Median usage                                           | 631 558 km                                                             | 668 583 km                                                            |
| Top buyer locations<br>(based on numbers of units sold) | 1. Spain<br>2. The Netherlands<br>3. Italy<br>4. Belgium<br>5. Hungary | 1. Spain<br>2. France<br>3. The Netherlands<br>4. Italy<br>5. Romania |

\* The median represents the middle value of a dataset, when all of the values are arranged from smallest to largest.



# About Ritchie Bros.

Ritchie Bros. connects equipment buyers and sellers through a global network of auction facilities and online sales channels. Ritchie Bros. brings you multi-channel, trusted solutions that are transparent, fair and convenient.

## RITCHIE BROS.®

### Unreserved & reserved online auctions

- 60 auction sites globally with secured storage & buyer inspection
- 590+ unreserved auctions a year
- Certainty of sale

## MARKETPLACE-E®

### Reserved online marketplace

- Control over your selling price & timing of sale
- Convenience of selling where it sits
- Buyer confidence from IronClad Assurance® equipment condition certification

## **MASCUS**® a Ritchie Bros. solution

### Online classified ad service

- Fastest growing online equipment listing service with over 450.000 listings
- Trusted by over 6.000 professional sellers worldwide

## RITCHIE BROS.®

### Inventory, data insights & disposition platform

- Inventory management system
- Market trends and pricing tools
- Maximize value of equipment through choice of disposition

## ROUSE®

### Data intelligence & performance benchmarking solutions

- Rental analytics
- Equipment sales support
- Fleet appraisals



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### **Ritchie Bros. Used Equipment Market Trends Report** (European Edition) | Q2 2026

The statements made in "Ritchie Bros. Used Equipment Market Trends Report (European Edition) | Q2 2026" (The Report) are based on the data obtained by Mascus and Ritchie Bros. sources. The Report is provided for informational purposes only and shall not be considered a warranty or guarantee of any kind. You agree you are not relying on any information contained herein as advice whether or not to enter into a particular transaction or take any particular action.

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