



CONSTRUCTING
THE EUROPE
OF TOMORROW

CECE Business Barometer October 2026



COMMITTEE FOR EUROPEAN
CONSTRUCTION EQUIPMENT

CECE Business Barometer Summary

October 2026

Business Climate and Sales in Europe:

- Climate index suffered a setback in October, as both current business scenario and future expectations went down moderately
- European equipment sales are still growing substantially

Incoming Orders past month:

- Order intake from international markets did not change compared to September
- Momentum on European markets is slowing, but there is still growth

Expectations for the next 6 months:

- Earthmoving equipment manufacturers and component suppliers are the most optimistic groups right now
- Expectations for Scandinavia and Spain/Portugal went up strongly, while France and CEE are seen more negative now
- Business sentiments on Middle East markets remain very low

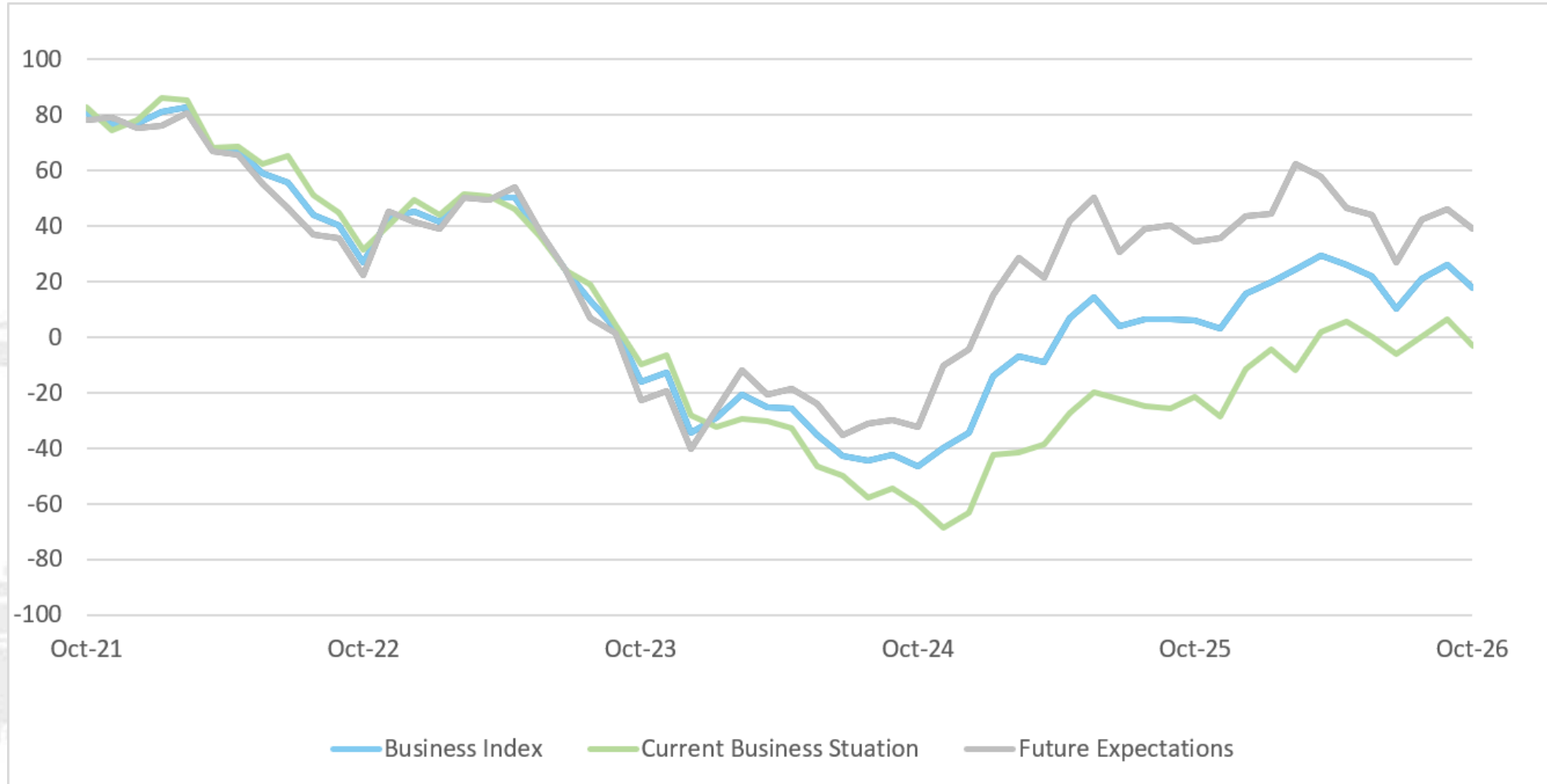
Workforce:

- There is still a slight majority of manufacturers who anticipate to increase their permanent workforce
- Temporary workforce will be kept stable at maximum

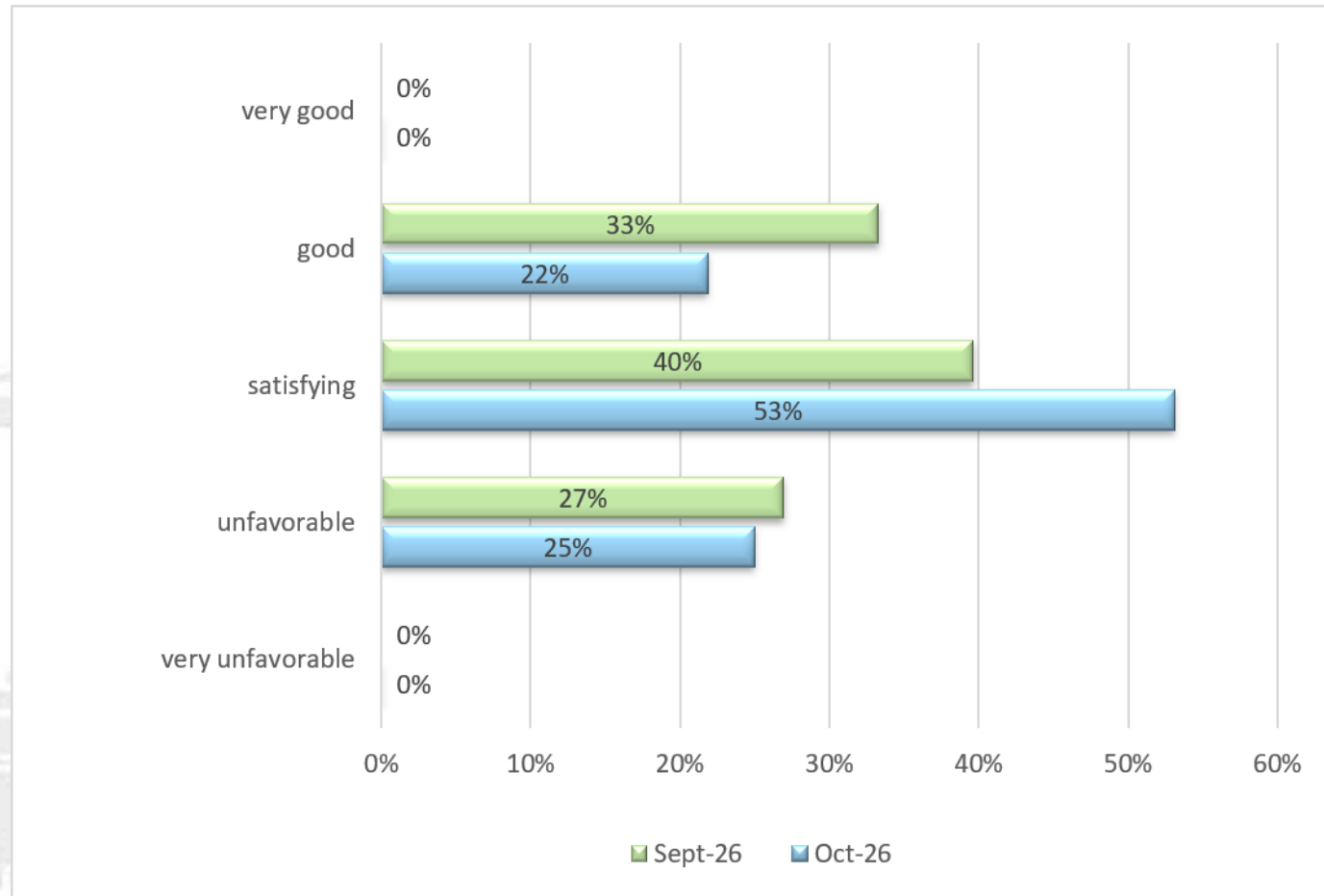
Company turnover forecast:

- A bit more than half of the companies expects their turnover to grow this year
- Only 14% anticipate declines to come

CECE Business Climate Index



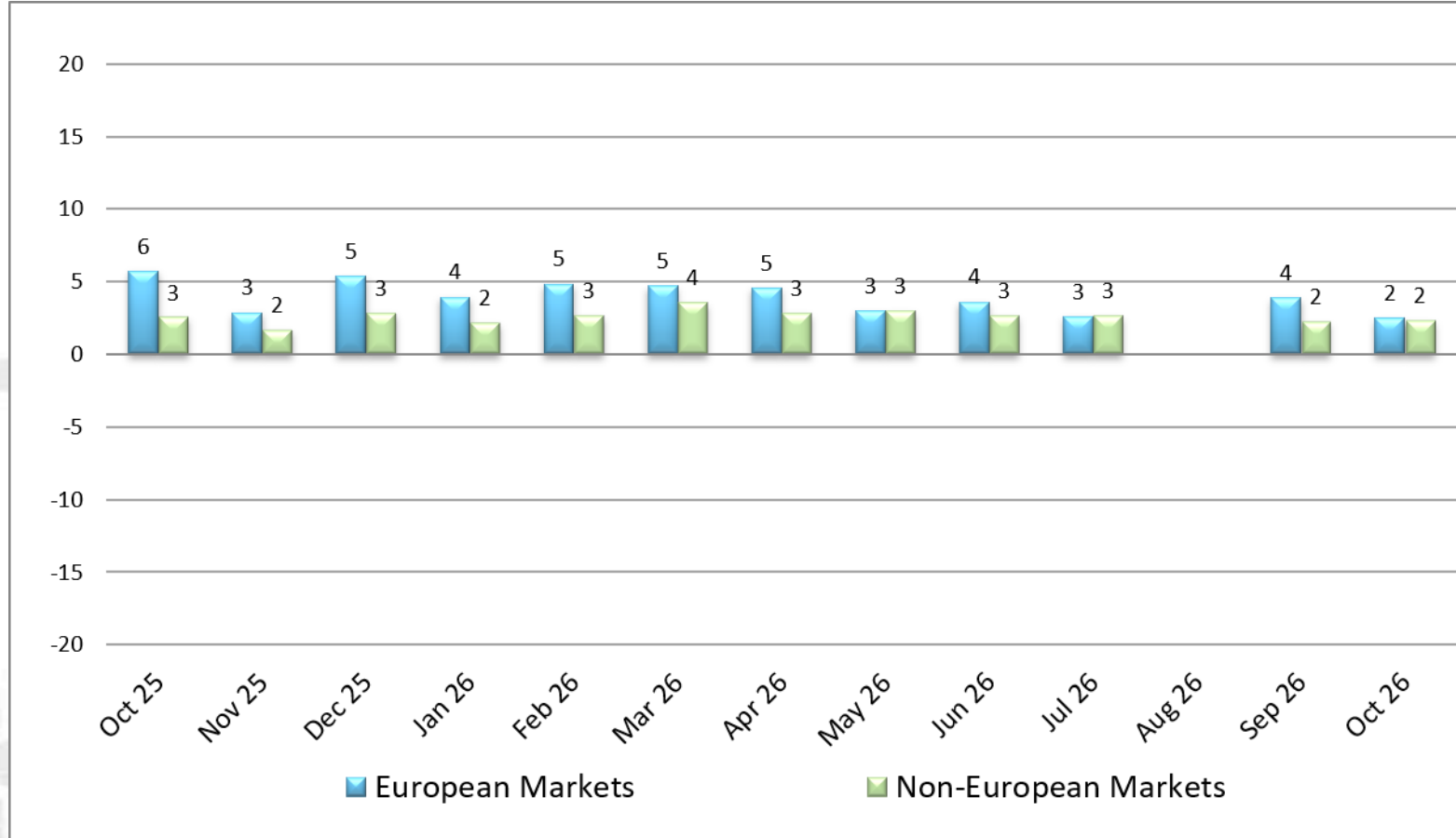
We consider our current business to be...



Noticeable deterioration in October, as the share of companies with good business went down from one third to less than one fourth.

Incoming Orders in the past month

Compared to the same period a year ago

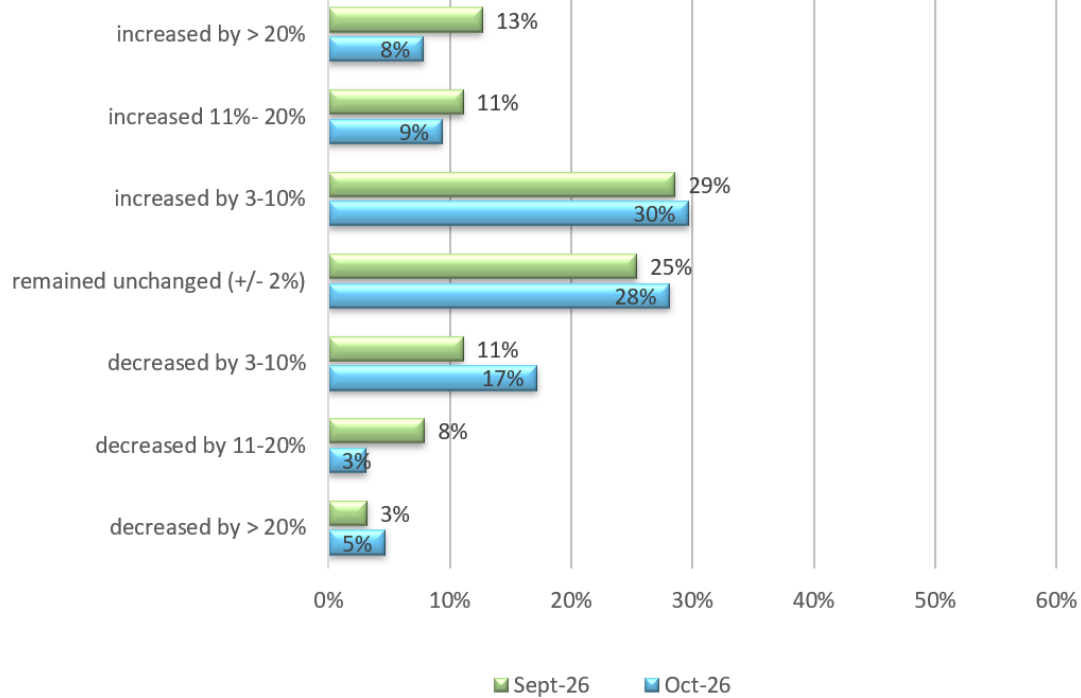


Order intake still grows, but the value for Europe is the lowest since March 2025.

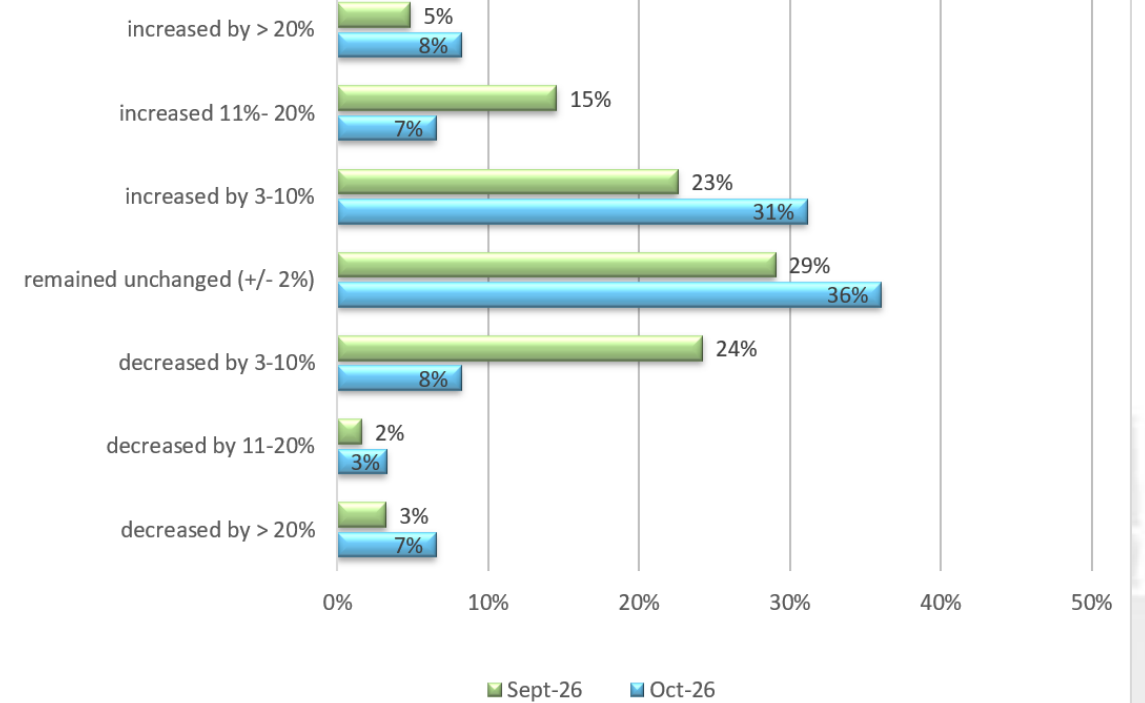
Incoming Orders in the past month

Compared to the same period a year ago

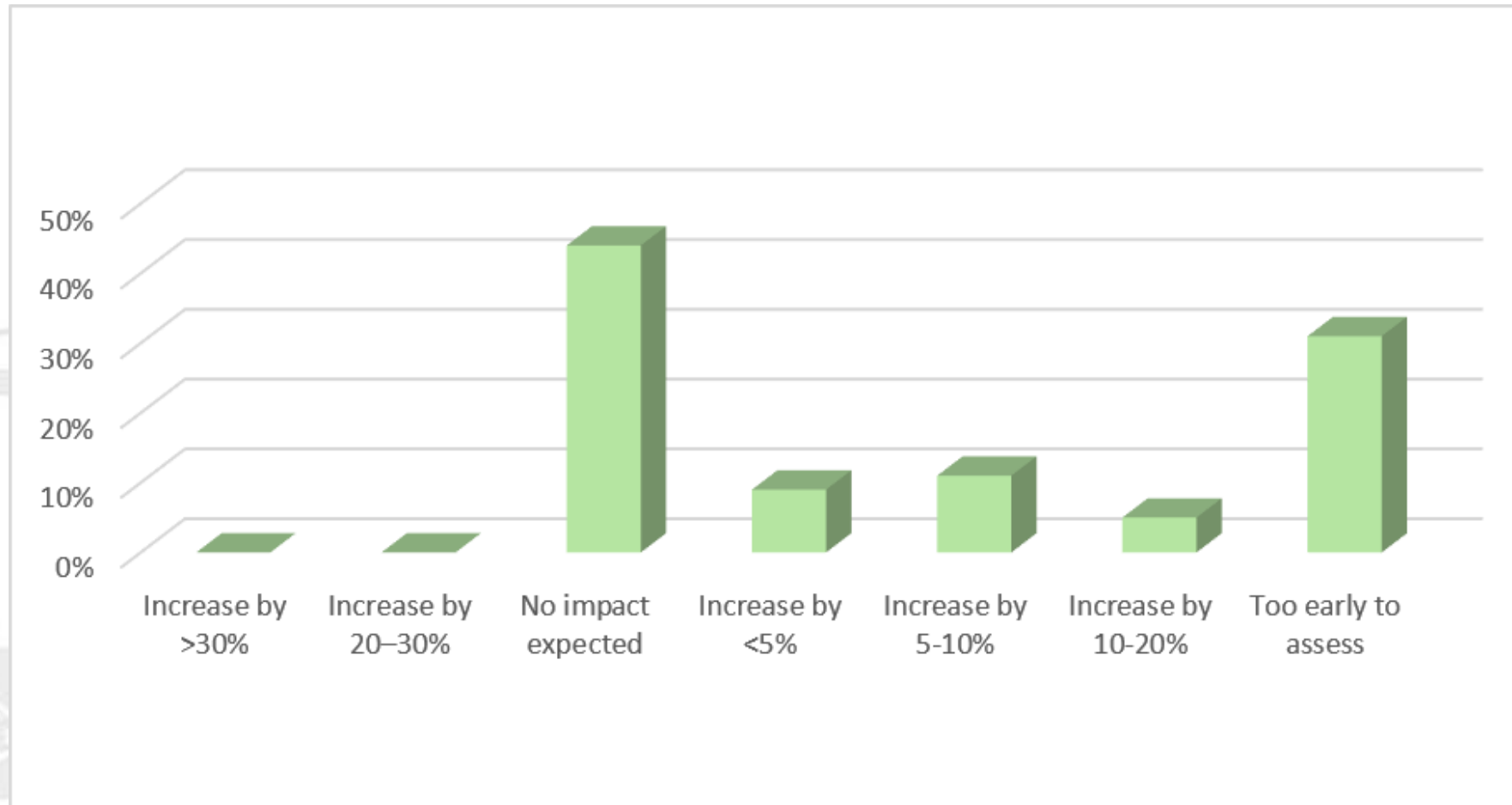
European Markets



Non-European Markets

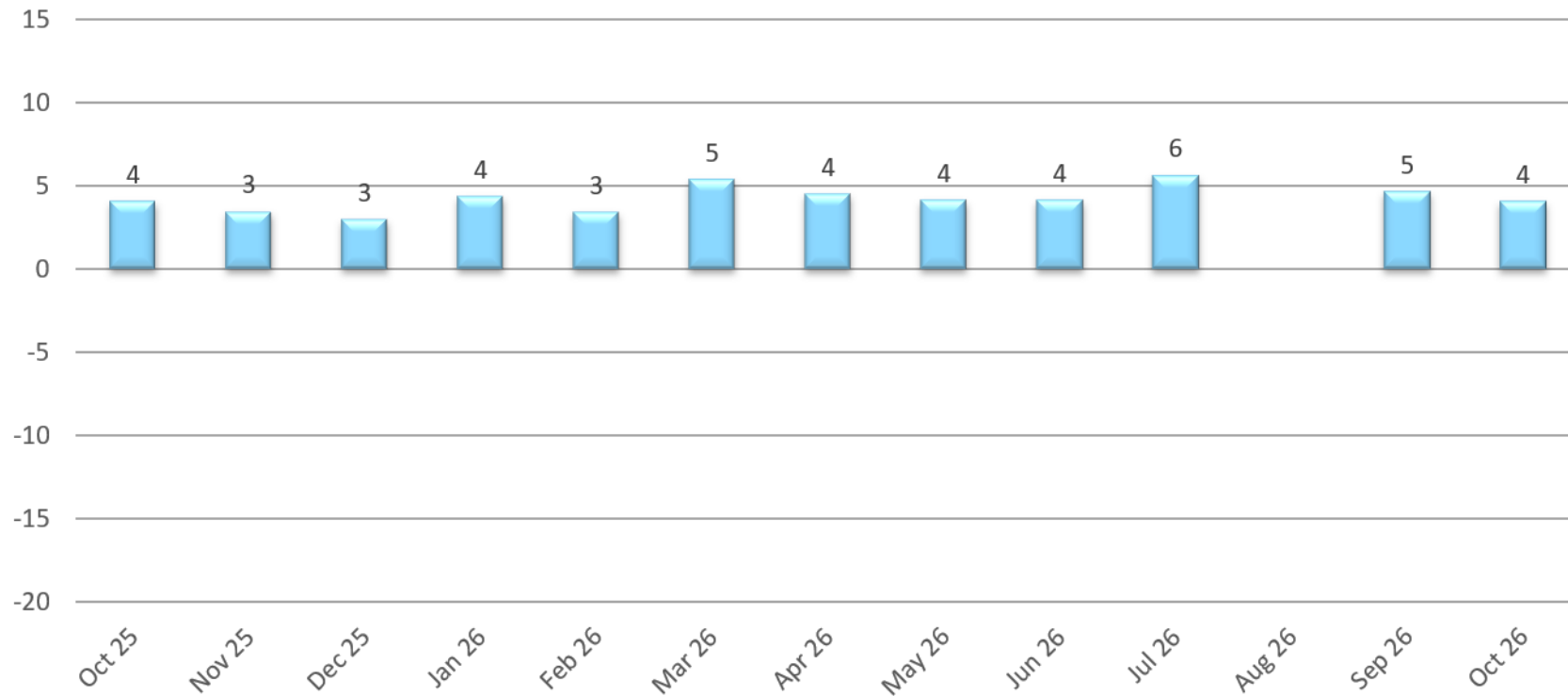


To what extent do you expect the EU-India FTA to increase your company's business opportunities in India over the next 3–5 years?



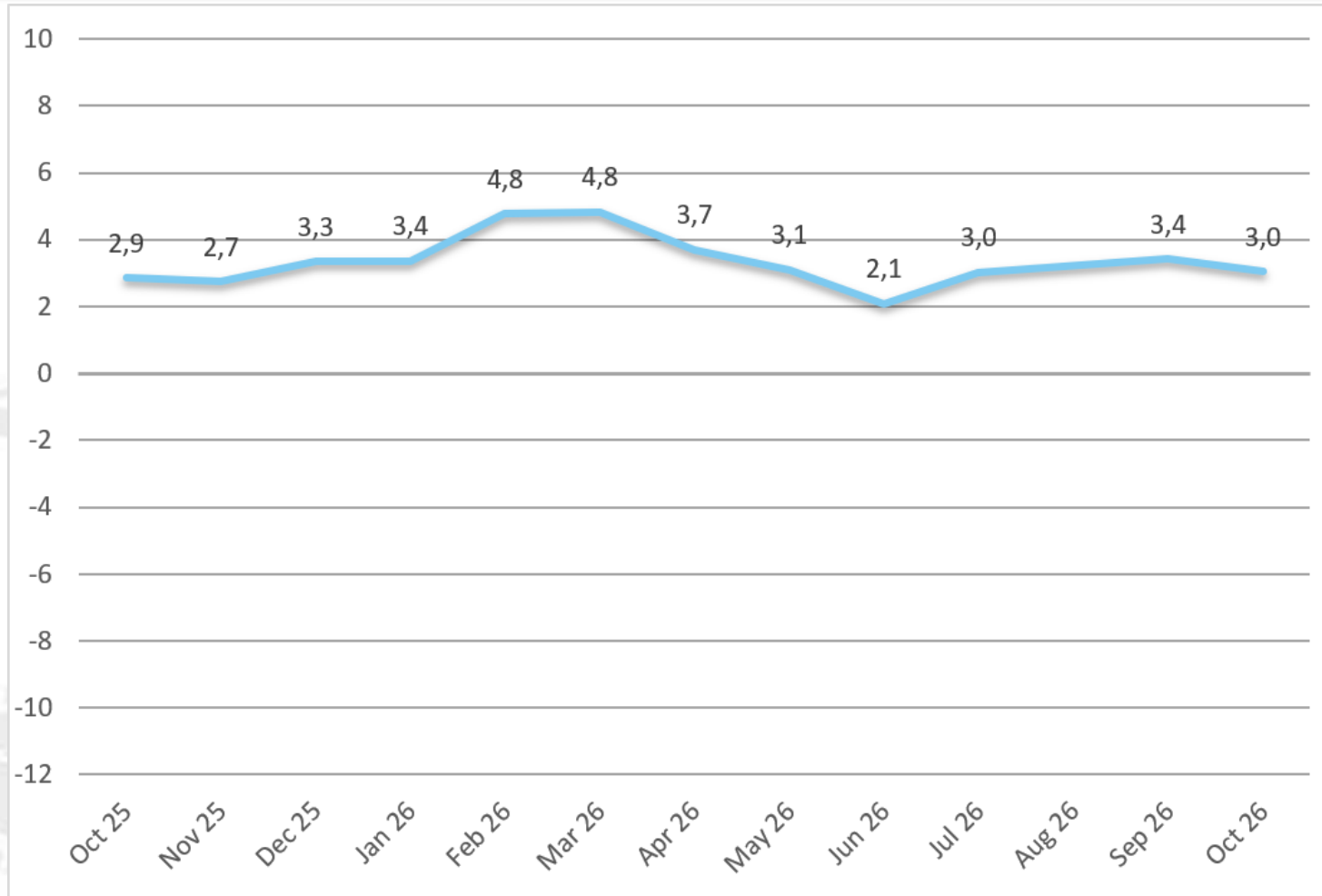
Sales in Europe in the past month

Compared to the same period a year ago



Sales growth in Europe stays on rather high levels.

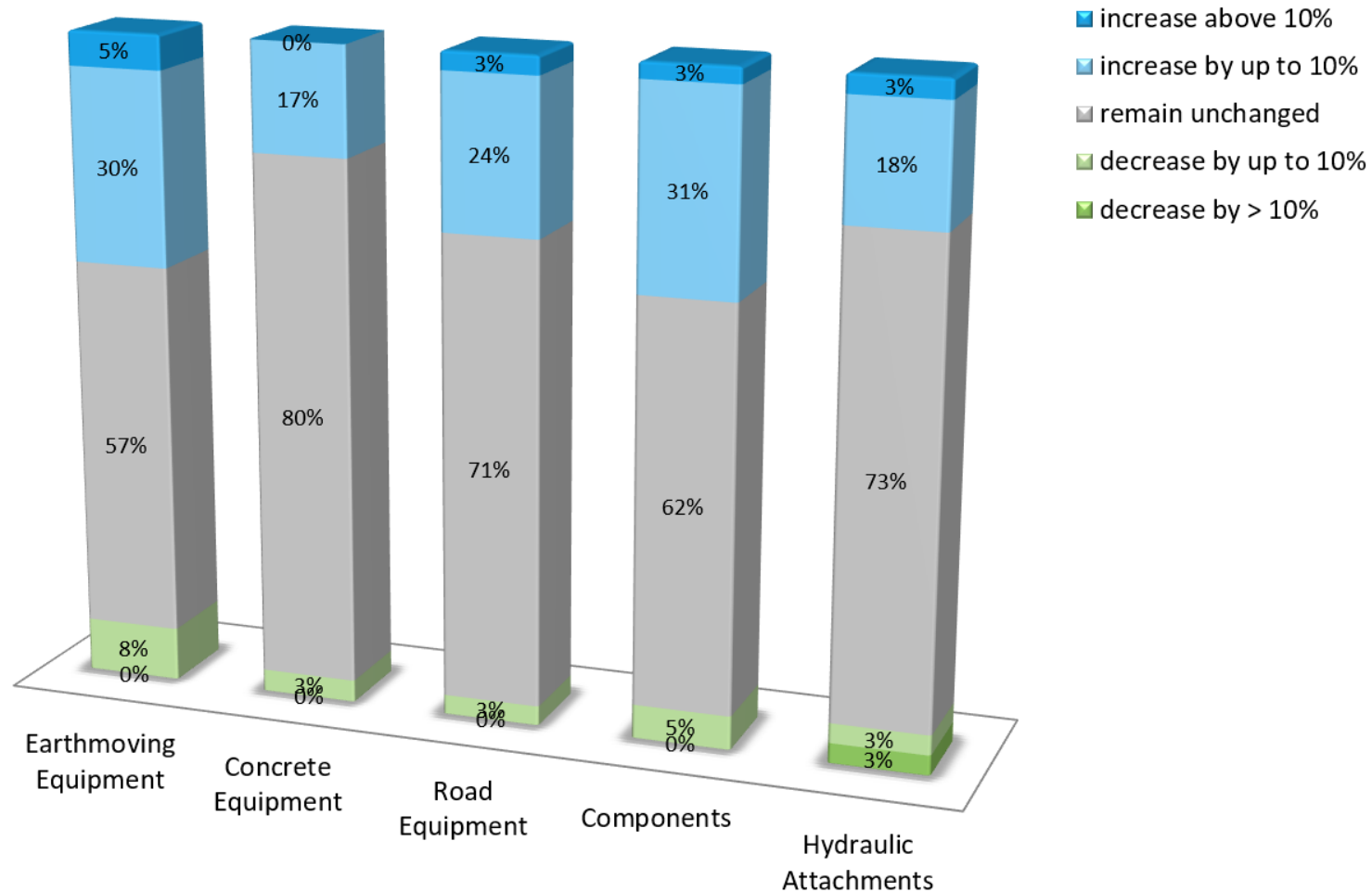
Total sales expectations for the next 6 months



Future expectations went down slightly but remain cautiously optimistic.

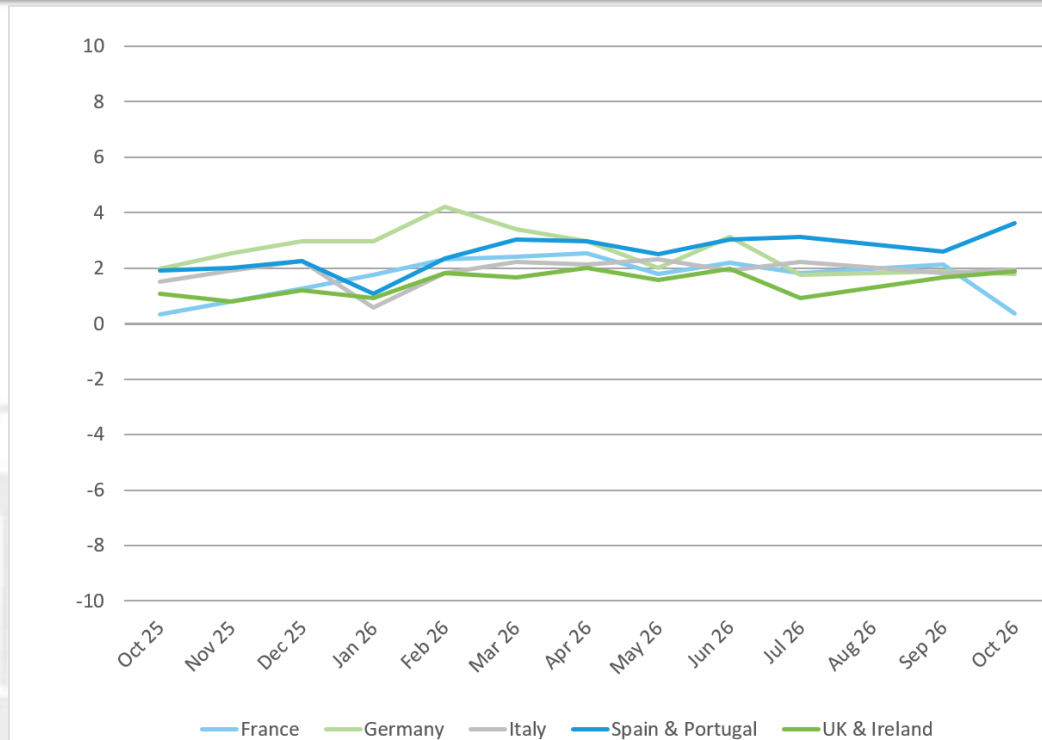
Total sales expectations for the next 6 months

by equipment type



Our sales expectations for the next 6 months

For the following markets are...



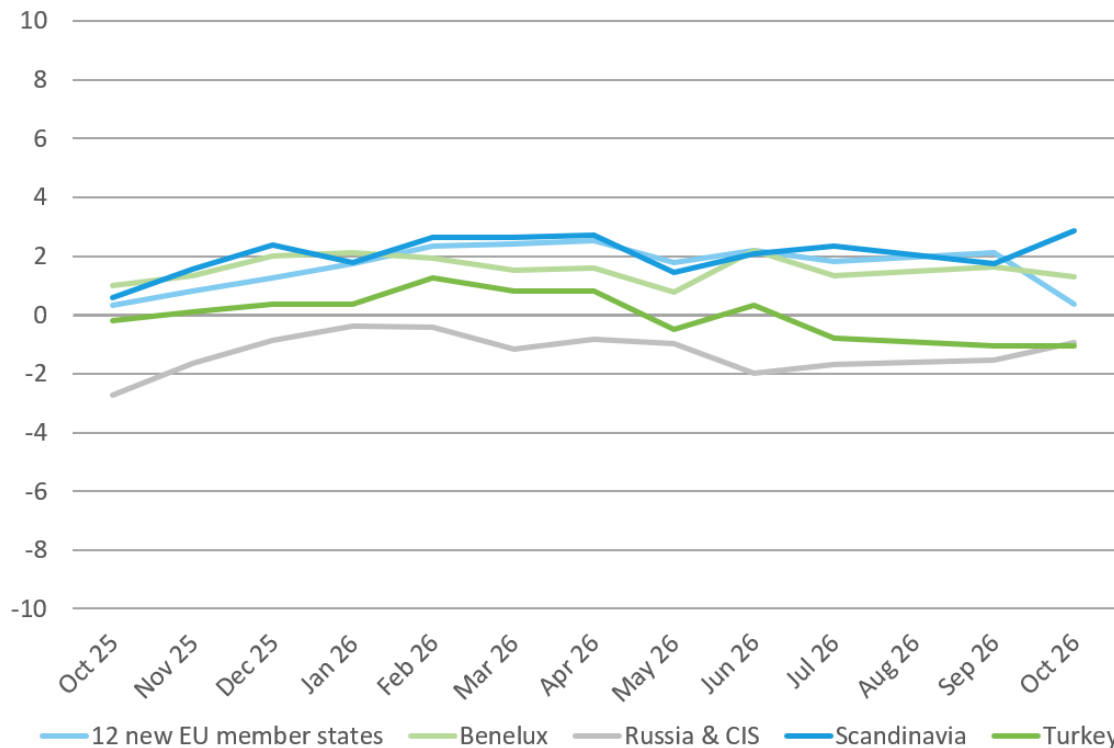
Opinion balance

compared to the same period a year ago

October 2026	France	Germany	Italy	Spain & Portugal	UK & Ireland
increase more than +10%	5%	9%	9%	15%	9%
increase between +3% and +10%	18%	21%	22%	31%	30%
flat between + 2 and - 2%	56%	57%	57%	50%	43%
decrease between -3% to -10%	16%	13%	11%	4%	15%
decrease more than -10%	4%	0%	0%	0%	2%

Our sales expectations for the next 6 months

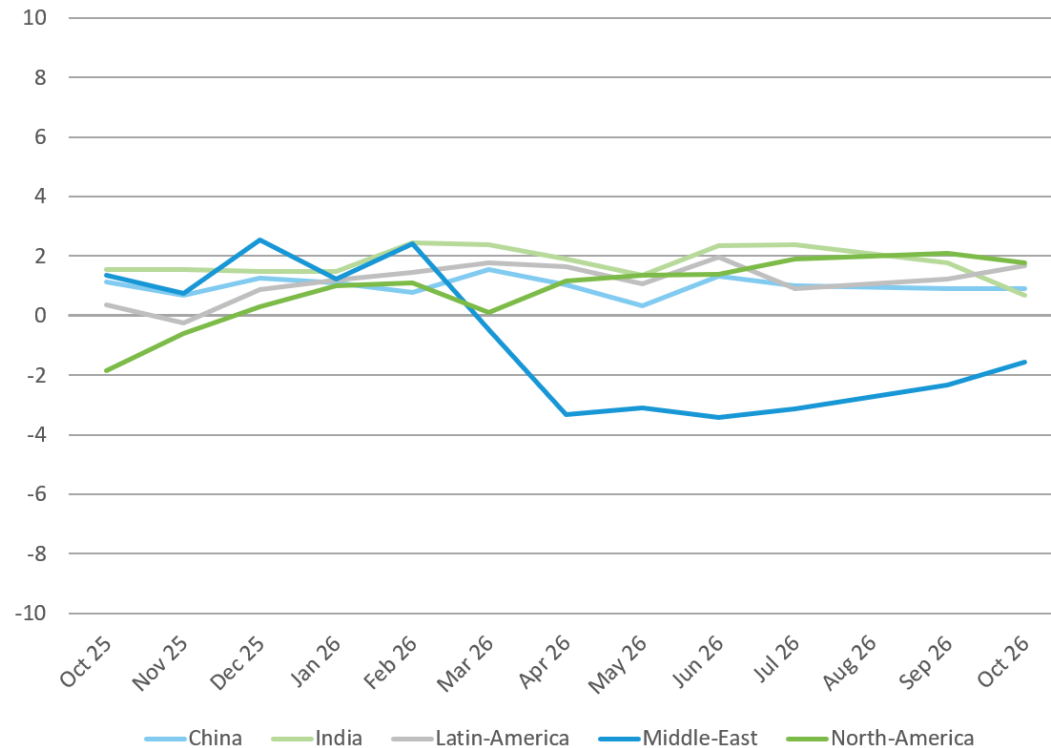
For the following markets are...



October 2026	12 new EU	Benelux	Russia & CIS	Scandinavia	Turkey
increase more than +10%	5%	6%	2%	7%	2%
increase between +3% and +10%	18%	20%	2%	44%	9%
flat between + 2 and - 2%	56%	63%	81%	43%	66%
decrease between -3% to -10%	16%	11%	7%	4%	17%
decrease more than -10%	4%	0%	7%	2%	6%

Our sales expectations for the next 6 months

For the following markets are...

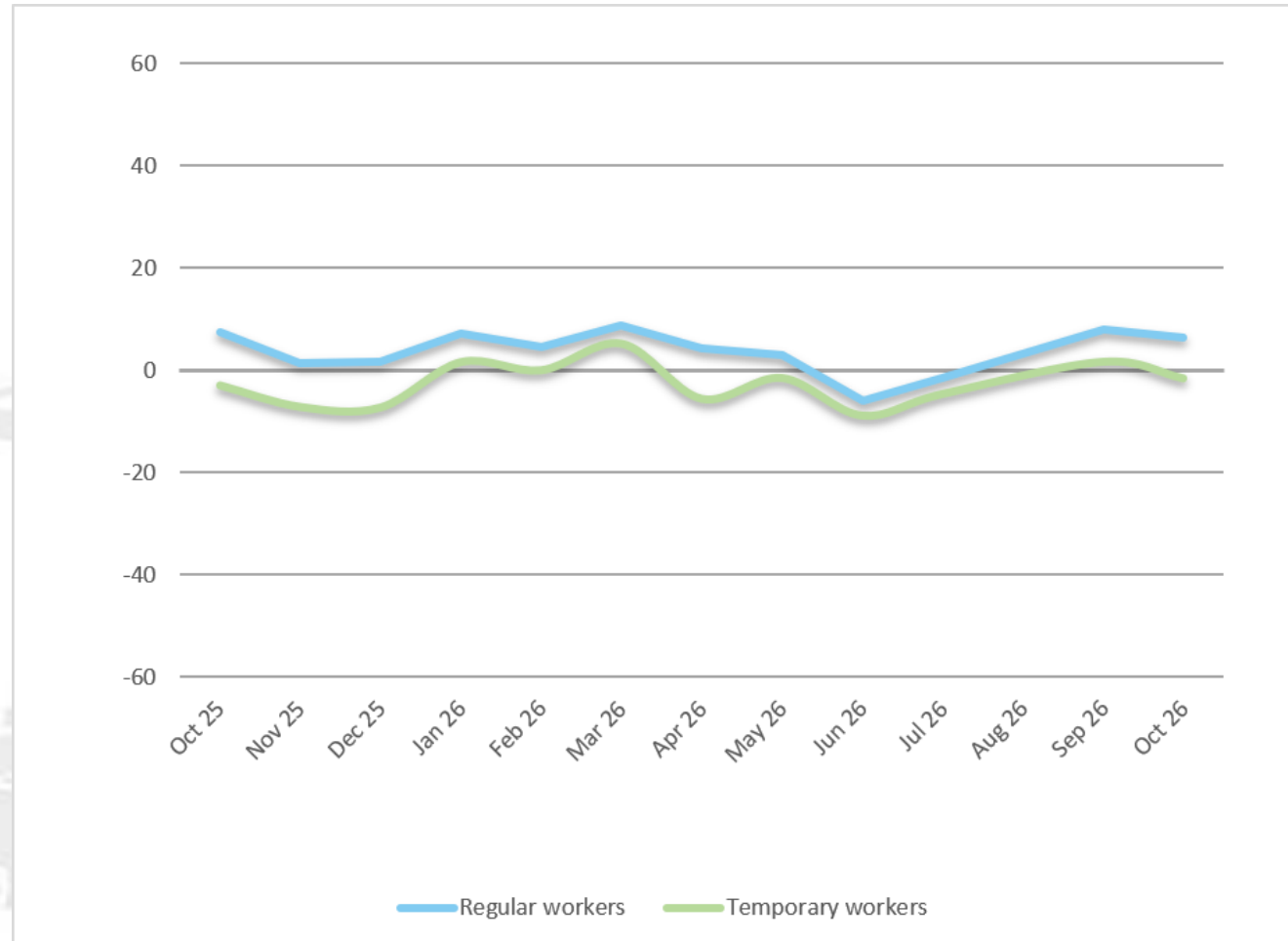


Opinion balance

compared to the same period a year ago

October 2026	China	India	Latin America	Middle East	North America
increase more than +10%	3%	0%	13%	2%	6%
increase between +3% and +10%	21%	19%	15%	6%	48%
flat between + 2 and - 2%	67%	77%	63%	65%	23%
decrease between -3% to -10%	10%	5%	6%	19%	19%
decrease more than -10%	0%	0%	4%	8%	4%

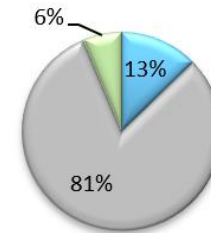
Workforce Plans for the next 6 months:



October 2026

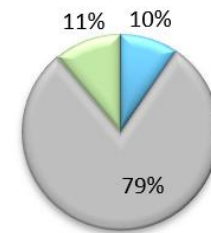
Regular workers

■ increase ■ remain the same ■ reduce



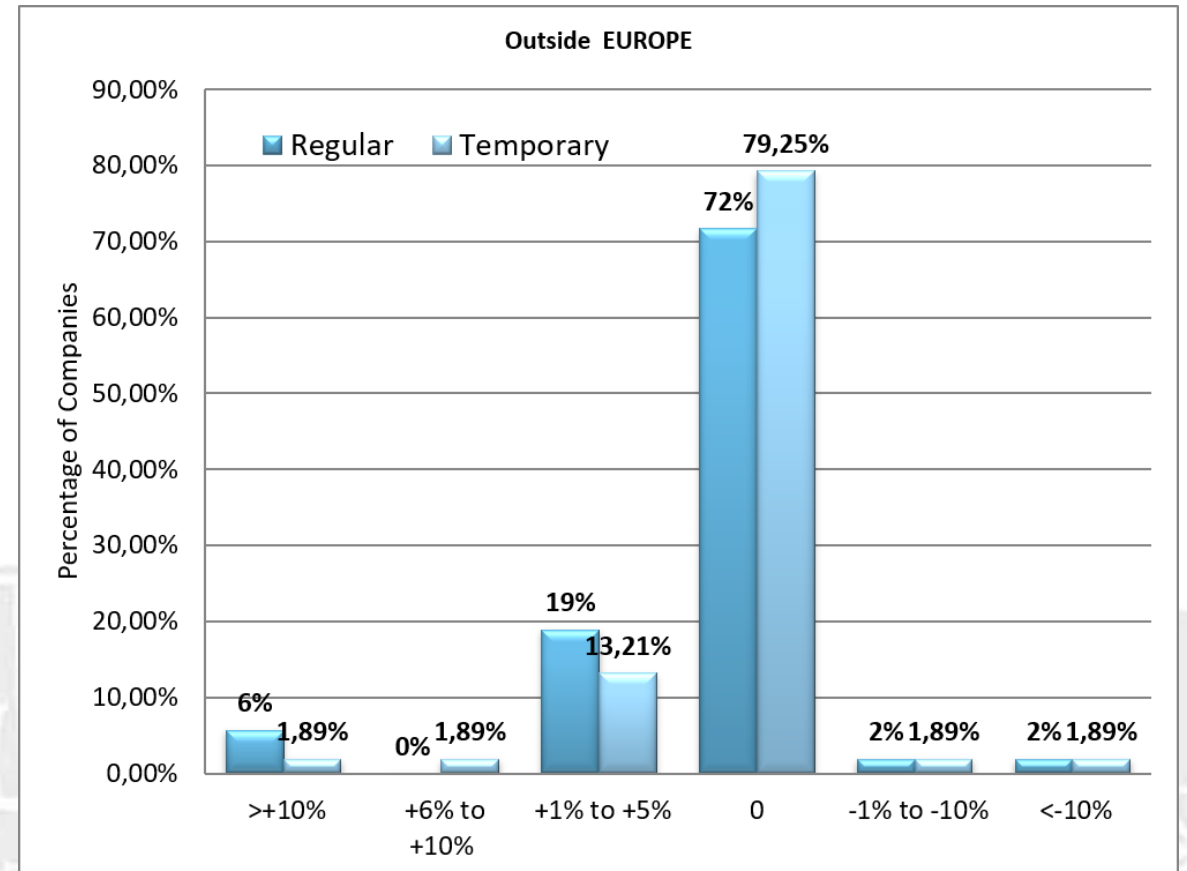
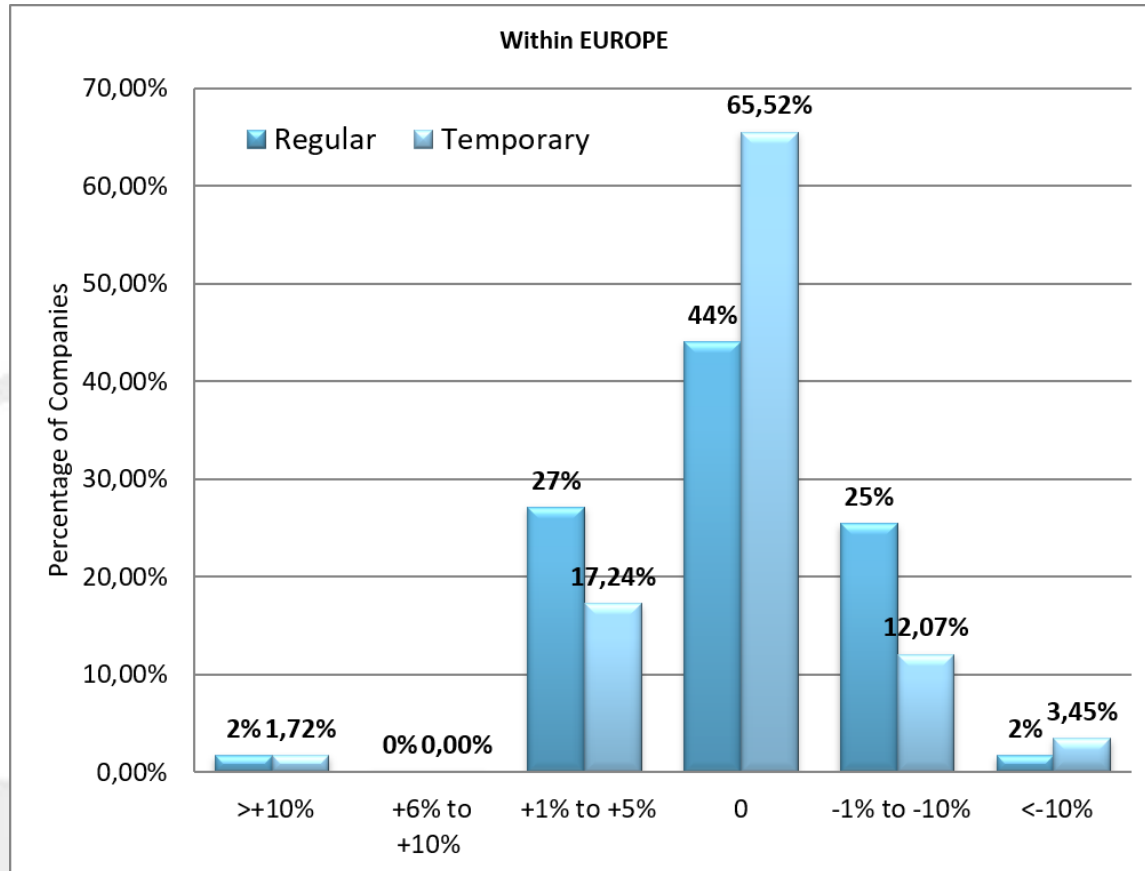
Temporary workers

■ increase ■ remain the same ■ reduce



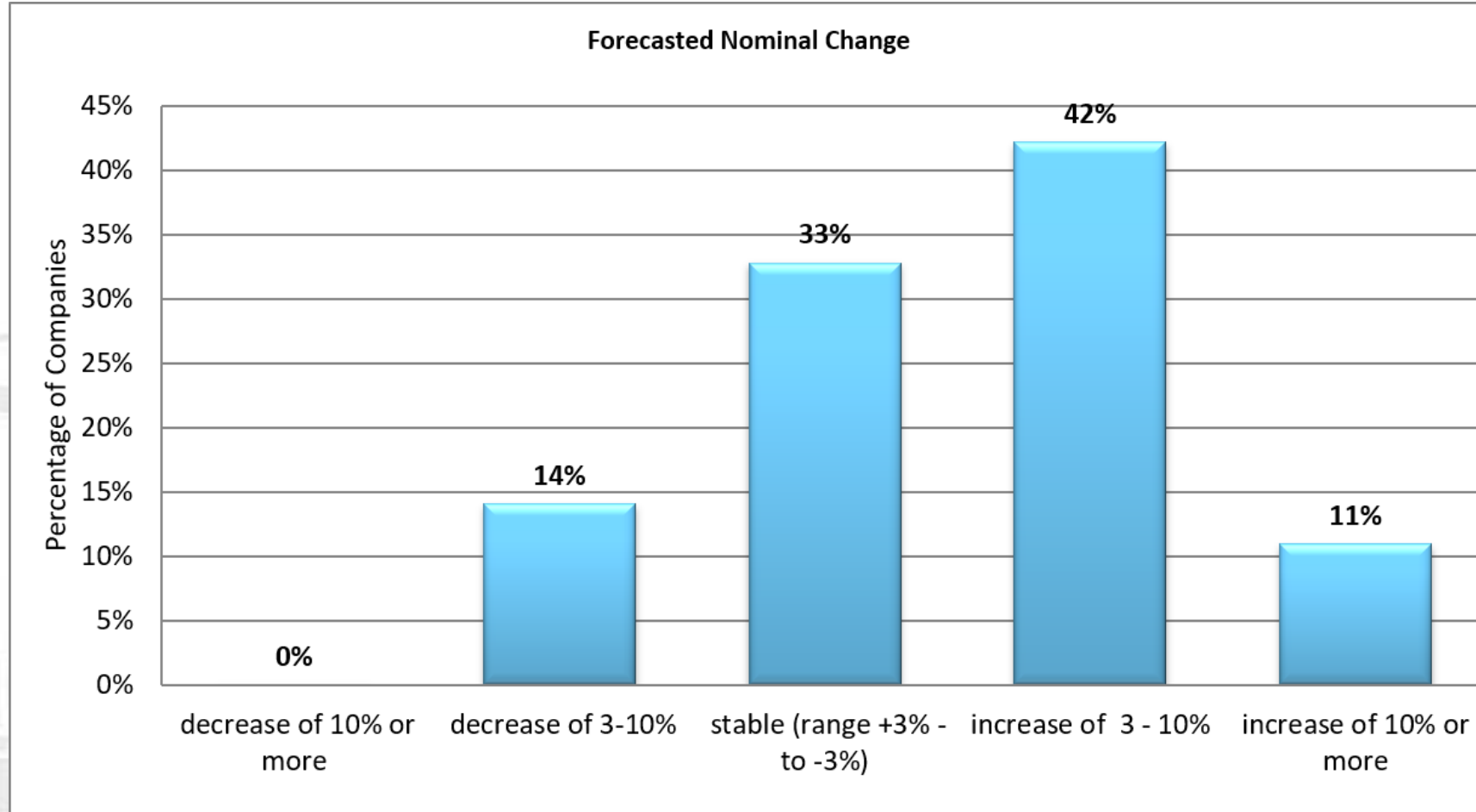
Employment Development last 12 Months

Change in % by companies



Company Turnover Forecast 2026

Nominal change in % compared to previous year

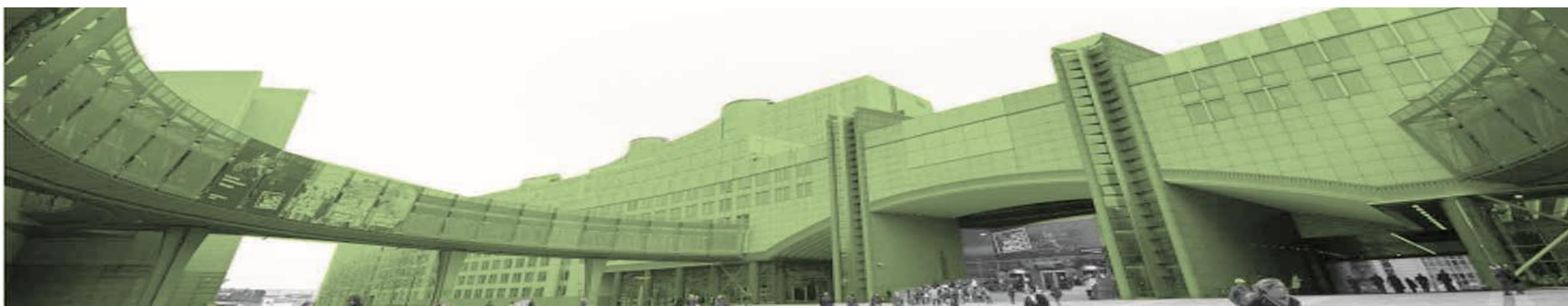


Thank you for your participation!



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