

Europe isn't enough:

Where building & construction manufacturers should look for their next growth markets

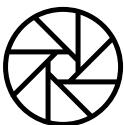
September 2026

Future B&C growth lies beyond Europe – but winning requires the right markets, portfolio mix and route-to-market



European B&C manufacturers must look beyond Europe for growth

- The most attractive building & construction markets are defined less by size and more by remaining urbanisation potential, where growth, infrastructure investment and demand for housing and services are yet to come.
- Asia stands out as the primary engine of growth, led by India, Indonesia and the Philippines, driven by scale, growth and major infrastructure pipelines.



Growth markets should be screened through three strategic lenses

- Market attractiveness alone is not sufficient for prioritisation.
- Manufacturers should assess growth markets through three lenses:
Demand attractiveness, Accessibility & execution risk, Ability to win



Winning portfolios balance four market archetypes

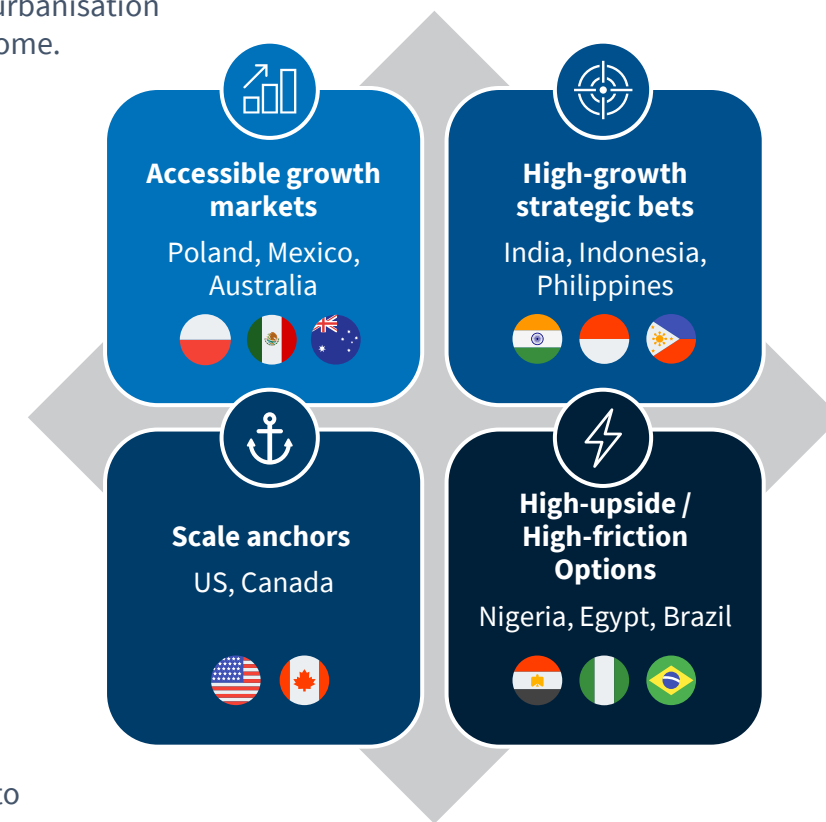
- Mature markets remain important for scale but offer limited upside and rising competitive pressure, while growth increasingly shifts to mid-scale, high-momentum markets.
- Manufacturers should build a balanced portfolio across four market archetypes: **Accessible growth markets, High-growth strategic bets, Scale anchors, High-upside / high-friction options**



Success depends on market-specific go-to-market choices

- Attractive markets require different route-to-market models – there is no single global expansion playbook.
- Investment models, local footprints, route-to-market approaches and risk appetite must be tailored to each market archetype.

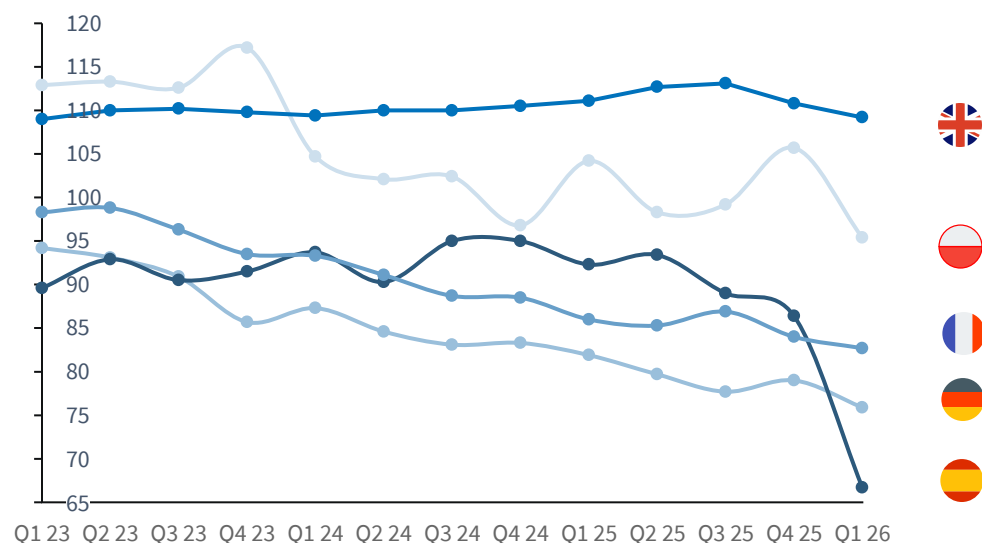
Market Archetypes



Europe is experiencing sluggish BC&I growth. Manufacturers must systemically identify growth markets in other regions of the world

Construction output trends worsened across Europe in 2026.

Production in construction of buildings [Index, 2021=100]



Manufacturers must screen markets outside of Europe through three strategic lenses:



Demand attractiveness

Does the market offer enough structural construction demand to matter?

- GDP and growth
- Infrastructure investment
- Population growth
- Urbanization potential
- Residential and non-residential construction demand



Accessibility and execution risk

How difficult is it to enter and operate successfully?

- Political stability
- Regulatory complexity
- Local-content requirements
- Channel fragmentation
- Project bankability



Ability to win

Can an international player realistically compete?

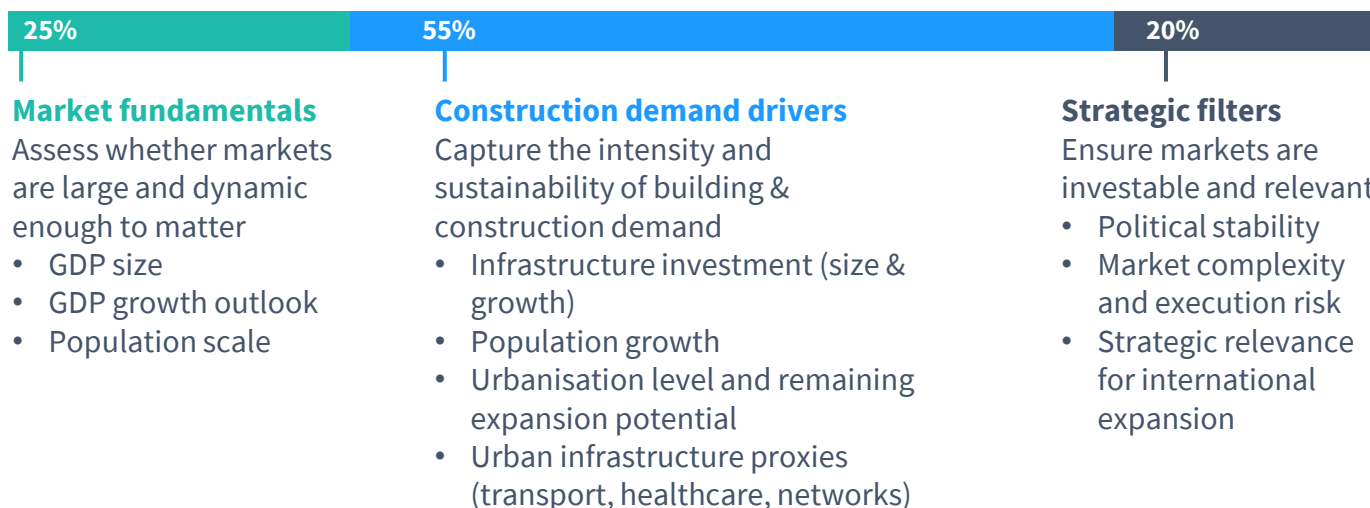
- Openness to imported systems
- Relevance of specification-driven selling
- Need for local manufacturing
- Partner/Distributor availability
- Price vs. performance dynamics

Ducker Carlisle develops structured approaches to help manufacturers identify forward-looking BC&I markets



Methodology

The methodology used for this article is built on a selected set of criteria designed to capture both the scale and the forward-looking dynamics of BC&I markets. It combines market fundamentals, demand drivers and execution considerations to identify where demand is not only significant but structurally positioned to grow.



Sources

This analysis is based on globally consistent and comparable datasets, providing a robust first-pass view of market attractiveness.

It is designed to inform prioritization, not to replace detailed country-level due diligence.



IMF



World Bank

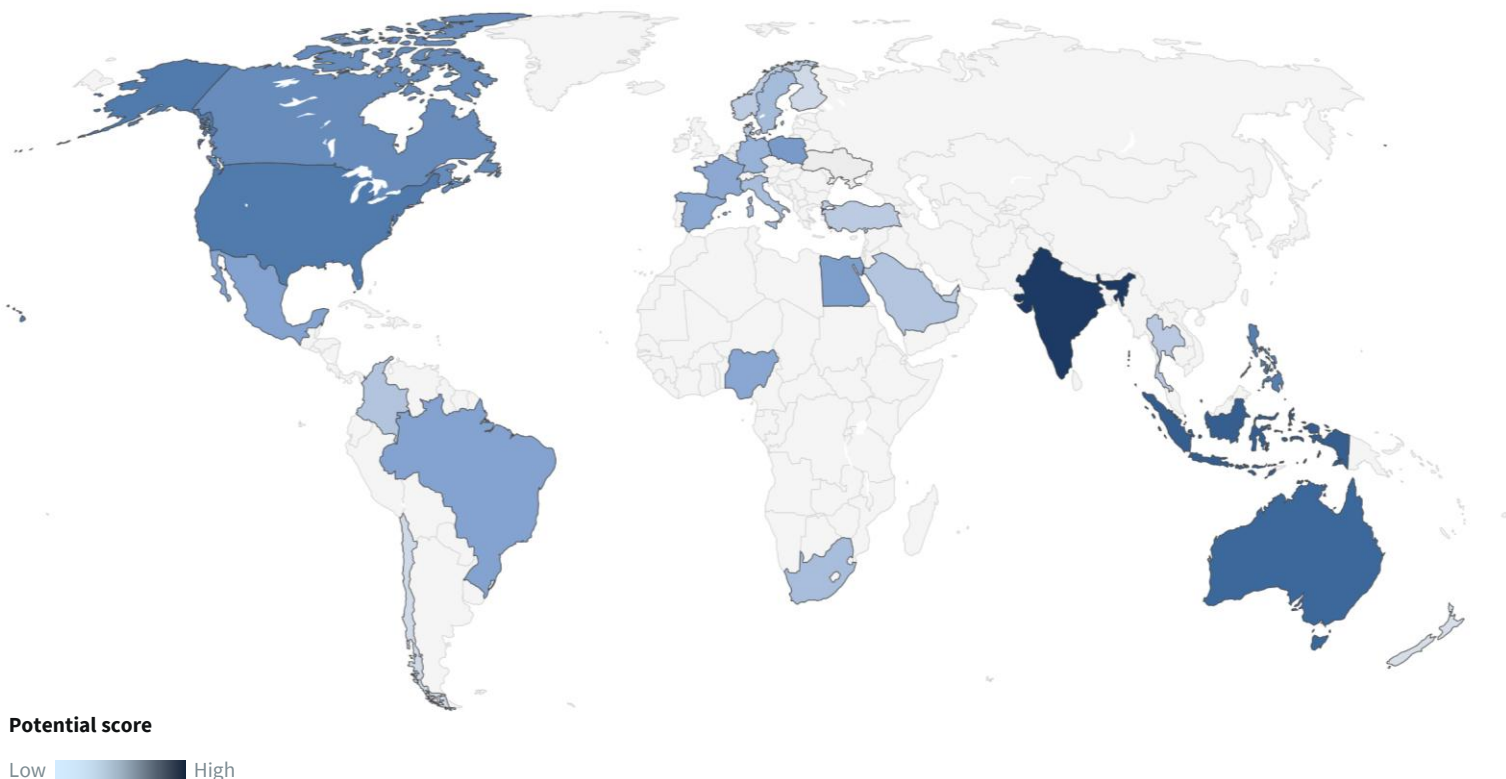


OECD



Ducker Carlisle

New-build growth is shifting toward high-growth, partially urbanised, infrastructure-constrained markets



Europe: Major European markets are mature from a new-build perspective, but aging infrastructure, renovation needs and energy-efficiency upgrades remain significant demand drivers. Poland stands out as one of the few European markets combining renewal demand with stronger expansion potential.

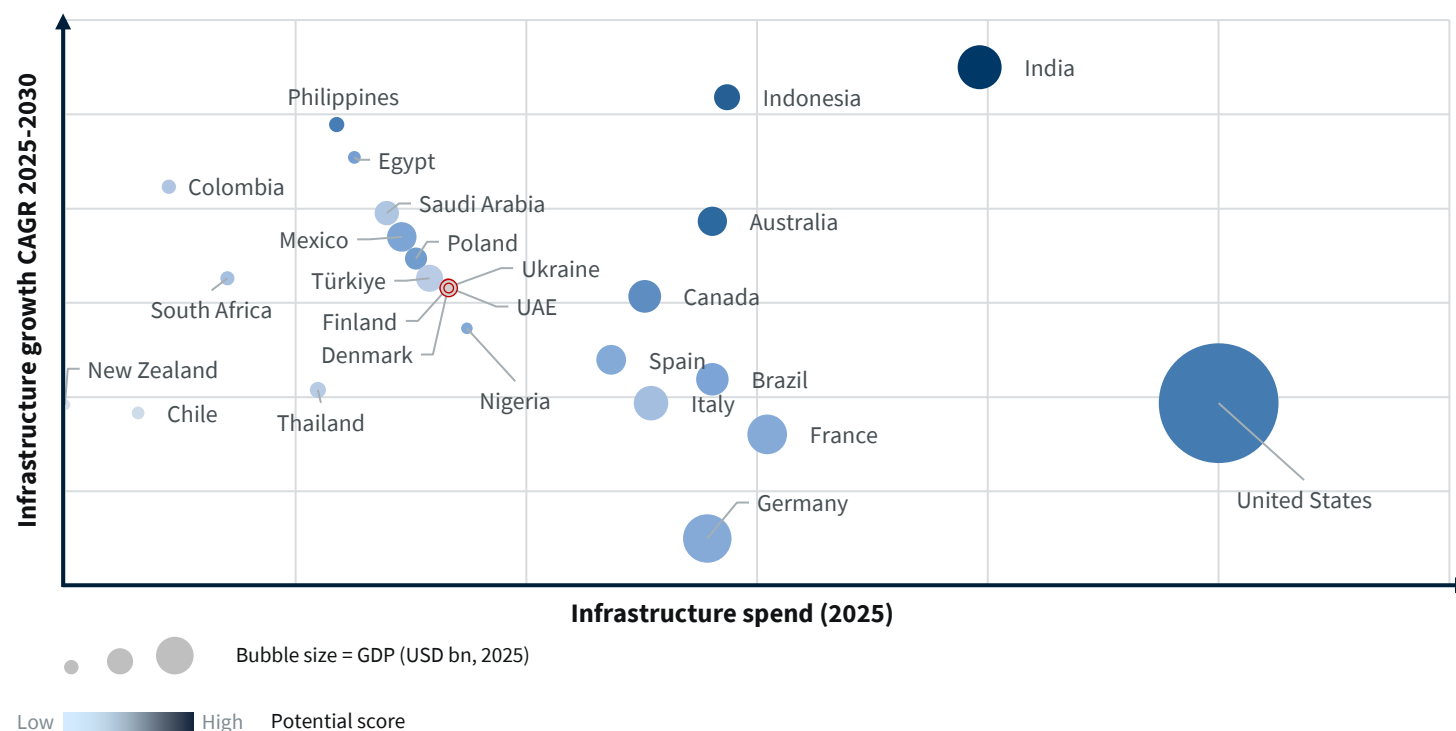
North America: North America, including the United States, Canada and Mexico, offers stronger growth potential than Europe. While the U.S. and Canada are established markets, Mexico in particular provides additional upside within the region.

Asia-Pacific: Asia-Pacific shows the highest growth potential globally. India and Indonesia stand out due to their combination of scale, strong growth momentum and significant remaining urbanisation runway. Australia and New Zealand also offer attractive growth opportunities, albeit with higher entry and accessibility barriers.

South America & Africa: Select markets in South America and parts of Africa, such as Egypt and Nigeria, offer high growth potential. However, this is offset by elevated political and economic uncertainty, which limits predictability and investability.

Infrastructure gaps, not market scale, will define future growth opportunities

Infrastructure investment: scale vs. growth across global markets



Growth is no longer driven by scale, but by infrastructure gaps.

Incremental demand will concentrate in underbuilt markets, not in the largest economies.

Mature markets secure revenue, not growth.

They remain critical for scale but offer limited upside and increasing competitive pressure.

The real battleground is shifting to mid-scale, high-momentum growth markets.

These geographies combine sufficient scale with the strongest growth trajectories.

Capturing this shift requires accepting higher risk earlier.

Top-performing players will be those entering ahead of market maturity and managing volatility, not avoiding it.

A first-pass global screen highlights 30 BC&I markets with strong growth potential

Low  High *Potential score*

Country	Region	GDP 2025 bn USD		GDP growth		Infrastructure spend 2025		Infrastructure growth CAGR 25-30		Population		Political stability	
		Value (bn USD)	Rank	Value (%)	Rank	Value (bn USD)	Rank	Value (%)	Rank	Value (m)	Rank	WGI indicator	Rank
1. India	Asia	4125,2	3	9,9%	2	145,0	2	2,6%	1	1263,9	1	-0,2	18
2. Indonesia	Asia	1443,3	12	7,6%	5	61,0	4	2,5%	2	252,2	3	-0,1	16
3. Australia	Oceania	1829,5	10	5,0%	11	58,0	5	2,0%	7	23,7	22	1,5	4
4. United States	North America	30615,7	1	3,8%	24	329,0	1	1,2%	17	319,3	2	0,4	14
5. Philippines	Asia	494,2	20	8,6%	4	16,0	17	2,4%	3	100,7	7	-0,7	23
6. Canada	North America	2283,6	6	5,0%	12	46,0	9	1,7%	12	35,5	20	1,1	7
7. Poland	Europe	1039,6	14	5,9%	9	21,0	13	1,8%	9	38,5	18	0,2	15
8. Egypt	Africa	349,3	24	11,0%	1	17,0	16	2,2%	4	87,7	8	-1,1	25
9. Mexico	North America	1862,7	9	5,6%	10	20,0	14	1,9%	8	119,7	6	-0,6	22
10. Brazil	South America	2256,9	7	4,5%	19	58,0	5	1,3%	15	203,6	4	-0,4	20
11. Nigeria	Africa	285,0	27	9,3%	3	25,0	11	1,6%	13	178,5	5	-1,8	27
12. Spain	Europe	1891,4	8	4,7%	15	41,0	10	1,4%	14	46,5	16	0,7	9
13. France	Europe	3361,6	4	3,6%	28	70,0	3	1,1%	21	66,1	11	0,6	11
14. Germany	Europe	5013,6	2	3,7%	26	57,0	7	0,7%	22	80,8	9	1,0	8
15. Sweden	Europe	662,3	15	4,7%	16					9,7	24	1,3	6
16. Italy	Europe	2543,7	5	3,3%	29	47,0	8	1,2%	17	60,8	13	0,5	13
17. South Africa	Africa	426,4	23	3,7%	27	11,0	19	1,8%	10	54,0	14	-0,5	21
18. Colombia	South America	438,1	22	4,8%	14	9,0	20	2,1%	5	47,9	15	-0,8	24
19. Saudi Arabia	Asia	1268,5	13	4,7%	17	19,0	15	2,0%	6	30,8	21	-0,1	16
20. Denmark	Europe	459,6	21	5,0%	13					5,7	27	1,7	1
21. Thailand	Asia	558,6	18	3,2%	30	15,0	18	1,3%	16	64,9	12	-0,3	19
22. Turkey	Asia	1565,5	11	4,6%	18	22,0	12	1,8%	10	76,7	10	-1,2	26
23. Norway	Europe	517,1	19	3,8%	25					5,2	29	1,6	2
24. United Arab Emirates	Asia	569,1	16	6,1%	18					9,4	25	0,6	11
25. Finland	Europe	314,7	26	3,9%	22					5,5	28	1,4	5
26. Chile	South America	347,2	25	4,4%	21	8,1	21	1,2%	20	17,8	23	0,7	9
27. New Zealand	Oceania	262,9	28	4,5%	20	6,3	22	1,2%	19	4,5	30	1,6	2
28. Ukraine	Europe	209,7	29	6,6%	7	7.9	23	1,9%	11	43,0	17	-1,8	27
29. Morocco	Africa	180,0	30	7,0%	6					38.1	19		
30. Austria	Europe	566,5	17	3,9%	23					9.2	26		



India (#1)



Market archetype:
High-growth
strategic bets

GDP size

\$ 4.1T (#3)

+8.6% vs 2024

Infrastructure spend

\$ 145bn (#2)

+8.6% vs 2024

Population

1,264m (#1)

+0,8% vs 2024

Urbanisation rate

36%

High remaining potential

Political stability

Moderate



Demand attractiveness

Residential building demand

- Structural housing deficit in urban areas, especially mid-income and affordable segments.
- Rapid urban migration driving expansion of Tier 2–3 cities.
- Government-backed housing schemes (PMAY) sustaining baseline demand.
- Increasing need for upgrading informal and aging housing stock.

Non-residential building demand

- Rapid expansion of logistics and warehousing driven by e-commerce and supply chain formalisation.
- Strong industrial construction demand (manufacturing, electronics, chemicals) linked to “Make in India”.
- Healthcare and education infrastructure scaling to match population needs.
- Growing demand for data centres and commercial real estate in major urban hubs.

Infrastructure demand

- Large domestic demand potential, but the market remains fragmented, relationship-driven and more complex than the headline growth story suggests.
- Imported materials can work in higher-spec projects, especially where international consultants or foreign-led projects influence specifications.



Accessibility & execution risk

- Broader penetration typically requires a local partner or distributor model, especially for compliance and logistics, and often a long execution ramp-up.
- Local partners are important, and foreign players should expect regulatory, licensing and local-content restrictions in parts of the market, especially in public projects.



Ability to win

- Local manufacturing/assembly often needed to stay cost-competitive and meet local-content requirements
- The market is price-sensitive, so offers must combine competitive local cost positioning with a clear performance value proposition. Technical support, training and local adaptation are critical to build trust and scale.



Indonesia (#2)



Market archetype:
High-growth
strategic bets

GDP size

\$ 1.4T (#12)

+7.6% vs 2024

Infrastructure spend

\$ 61bn (#4)

+2.5% vs 2024

Population

252m (#3)

+0.9% vs 2024

Urbanisation rate

57%

Strong expansion potential

Political stability

Moderate



Demand attractiveness



Residential building demand

- Strong growth in industrial parks and manufacturing facilities driven by foreign investment flows.
- Expansion of logistics and warehousing linked to e-commerce penetration.
- Development of commercial real estate in major urban centres.
- Tourism infrastructure supporting hospitality and mixed-use developments.



Non-residential building demand

- Rapid urban population growth driving sustained housing demand in major cities.
- Expansion of mid-income and suburban housing developments.
- Government support for affordable housing programs.
- Continued need for basic housing in secondary urban areas.



Infrastructure demand

- Large domestic demand potential, but the market remains fragmented, relationship-driven and more complex than the headline growth story suggests.
- Imported materials can work in higher-spec projects, especially where international consultants or foreign-led projects influence specifications.



Accessibility & execution risk

- Local partners are often needed for market access, permitting, distribution and navigating a fragmented geography.
- Foreign players should expect regulatory, licensing and local-content frictions in parts of the market, especially in public projects.



Ability to win

- Local assembly/content can be important, especially where TKDN/local-content rules affect project eligibility & competitiveness.
- Winning large projects requires strong coverage and aftersales reach, not just product availability.
- The market is price-sensitive, with strong pressure from Asian competitors and a customer focus on practical value.



Australia (#3)

GDP size

\$ 1.8T (#10)

+5% vs 2024

Infrastructure spend

\$ 58bn (#5)

+2.0% vs 2024

Population

24m (#21)

+1.2% vs 2024

Urbanisation rate

86%

Low expansion potential

Political stability

High

**Market archetype:
Accessible growth
market**


Demand attractiveness



Residential building demand

- Persistent housing shortages supporting sustained residential construction demand.
- Strong development of high-density and multi-family housing projects.
- Population growth driven by immigration sustaining long-term housing needs.
- Renovation and upgrading of aging residential stock.



Non-residential building demand

- Stable demand for commercial real estate in large metropolitan areas.
- Continued expansion of healthcare and education facilities.
- Growth in logistics and distribution centres linked to consumption patterns.
- Institutional construction supported by public investment programs.



Infrastructure demand

- One of the easier markets to penetrate commercially, with transparent standards, predictable business practices and a familiar specification environment.
- Imported products can compete, particularly in differentiated or premium categories, provided local representation and compliance are in place.



Accessibility & execution risk

- Market size is attractive but limited, so success depends more on targeting the right niches than on broad national rollout.
- Freight costs and distance remain a structural constraint for bulky or low-value products without a local footprint.



Ability to win

- Local manufacturing is usually not required, but a local footprint helps offset freight costs and improve service levels for bulky products; local importers/distributors are typically sufficient for specification support and contractor access.
- Compliance and specification credibility are key, driven by standards, documentation and proven performance.
- Price matters less than in emerging markets; premium products can win with a clear, differentiated value proposition.



United States + Canada (#4)



Market archetype:
Scale anchor

GDP size

\$ 32.9T (#1)

+3.9% vs 2024

Infrastructure spend

\$ 375bn (#1)

+1.3% vs 2024

Population

319m (#3)

+0.7% vs 2024

Urbanisation rate

83%

Low expansion potential

Political stability

Very high



Demand attractiveness

Residential building demand

- Structural housing shortages in key metropolitan areas, especially in Canada.
- Strong demand for multi-family housing and urban densification.
- Renovation remains a major driver in mature housing markets.
- Affordability constraints shaping construction typologies and locations.

Non-residential building demand

- Strong industrial construction driven by reshoring and supply chain reconfiguration.
- Rapid expansion of logistics, warehousing and data centre infrastructure.
- Stable demand for healthcare, education and institutional buildings.
- Commercial real estate evolving toward mixed-use and flexible formats.

Infrastructure demand

- The US and Canada remain highly attractive and dynamic construction markets but increasingly operate as “local-for-local” environments in many materials categories.



Accessibility & execution risk

- In the US in particular, tariffs, domestic-preference dynamics and channel power favour local production, acquisitions or distribution-led entry.



Ability to win

- Local-for-local matters in many categories, especially in the U.S.
- Local manufacturing or sourcing is often needed to stay cost-competitive/relevant.
- Strong distributors or direct coverage are critical to win specifications and major accounts.
- Price matters, but compliance, availability and service often matter more.
- Scale usually requires local footprint, acquisition or deeper channel control.



Philippines (#5)



Market archetype:
High-growth
strategic bets

GDP size

\$ 0.5T (#19)

+8.6% vs 2024

Infrastructure spend

\$ 16bn (#17)

+2.4% vs 2024

Population

101m (#17)

+1.3% vs 2024

Urbanisation rate

48%

High expansion potential

Political stability

Low



Demand attractiveness

Residential building demand

- Rapid population growth driving strong housing demand in urban areas.
- Urban migration supporting expansion of metropolitan housing markets.
- Development of affordable housing segments.
- Continued need for basic and entry-level housing supply.

Non-residential building demand

- Growth in logistics and warehousing driven by consumption expansion.
- Development of commercial real estate in major urban centres.
- Expansion of healthcare and education infrastructure.
- Tourism-related construction supporting hospitality and mixed-use assets.

Infrastructure demand

- Market entry is feasible, but foreign penetration is shaped by local ownership rules, procurement constraints and distributor-led execution.
- Imported materials and systems can perform well in higher-end urban, hospitality, infrastructure and resilient-building applications, where local supply is less sophisticated.
- Currently under a massive data center construction boom.



Accessibility & execution risk

- Easier than India in terms of local competitive depth, but more exposed to execution risk, institutional unpredictability and Chinese imports.
- Execution risk is significant, so select projects and partners carefully.
- Public and infrastructure-linked opportunities often require local partners, EPC ecosystems or externally funded project structures for access and execution.



Ability to win

- Imported products can win in premium, resilient and spec-driven segments.
- Distribution and contractor reach matter more than a broad direct model.
- The market is price-sensitive, with pressure from local and Chinese supply.



Poland (#6)

GDP size

\$ 1.0T (#14)

+5.9% vs 2024

Infrastructure spend

\$ 21bn (#13)

+1.8% vs 2024

Population

38m (#18)

+0% vs 2024

Urbanisation rate

60% (#2)

Moderate expansion potential

Political stability

High

**Market archetype:
Accessible growth
market**


Demand attractiveness



Residential building demand

- Continued demand for housing in urban centres.
- Urban densification and modernization of existing housing stock.
- Demand supported by improving income levels.
- Renovation of aging residential buildings.



Non-residential building demand

- Growth in logistics and industrial real estate construction.
- Expansion of manufacturing facilities linked to nearshoring trends.
- Increasing demand for commercial and office developments.
- Development of public and institutional infrastructure.



Infrastructure demand

- Particularly relevant for suppliers exposed to infrastructure, energy transition, industrial and logistics-related demand.
- Strong market for focused commercial expansion, but less attractive for undifferentiated commodity offerings.



Accessibility & execution risk

- One of the most accessible growth markets in Europe, with EU rules, familiar standards and a relatively straightforward route-to-market.
- Entry barriers are less regulatory than commercial, especially around local competition, channel relationships and price/value positioning.



Ability to win

- No local manufacturing is required, but local stock or assembly can improve speed and cost. Distributors with strong regional and contractor coverage are usually enough.
- Winning depends more on channel strength than regulation.
- The market is price-conscious, with strong local and regional competition.
- Fast delivery and reliable availability are key differentiators.



Egypt (#7)

GDP size

\$ 349bn (#23)

+11.0% vs 2024

Infrastructure spend

\$ 17bn (#16)

+2.2% vs 2024

Population

88m (#8)

+1.9% vs 2024

Urbanisation rate

43% (#2)

High expansion potential

Political stability

Low

**Market archetype:
High-upside / High-
friction Option**


Demand attractiveness



Residential building demand

- Rapid population growth creating sustained housing demand.
- Expansion of new cities and large-scale housing developments.
- Significant need for affordable housing supply.
- Urban migration supporting residential construction growth.



Non-residential building demand

- Strong pipeline of public buildings linked to administrative and institutional expansion.
- Development of commercial and mixed-use real estate in new urban areas.
- Growth in tourism-related infrastructure and hospitality assets.
- Industrial zones supporting manufacturing and export activity.



Infrastructure demand

- Opportunity is real, but penetration is selective rather than easy, with access often influenced by state-linked and military-linked ecosystems.
- Imported systems can find room in infrastructure, commercial and large-scale housing projects, especially in performance-led segments.
- Attractive as a project-led market, but less straightforward as a broad, open commercial market.



Accessibility & execution risk

- Local partners are usually needed for access, approvals and major projects.
- Success usually requires strong local relationships, careful payment-risk management and close attention to approvals and tender structures.
- Project selection matters, as payment risk and bankability can vary widely.



Ability to win

- Imported products can win in technical, premium and large-project applications.
- Price pressure is high, so value must be clear and commercially grounded.
- Local presence and relationships are key to scaling beyond selective wins.



Mexico (#8)

GDP size

\$ 1.9T (#9)

+5.6% vs 2024

Infrastructure spend

\$ 20bn (#14)

+1.9% vs 2024

Population

120m (#6)

+1.0% vs 2024

Urbanisation rate

81% (#2)

Low expansion potential

Political stability

Moderate

**Market archetype:
Accessible growth
market**


Demand attractiveness



Residential building demand

- Population growth sustaining housing demand across regions.
- Expansion of urban housing in industrial corridors.
- Development of affordable housing segments.
- Housing demand linked to workforce mobility.



Non-residential building demand

- Strong demand for industrial and manufacturing facilities.
- Expansion of logistics and warehousing infrastructure.
- Growth in commercial construction linked to urban expansion.
- Development of infrastructure supporting export industries.



Infrastructure demand

- One of the most attractive entry markets in the group, especially for suppliers linked to industrial, logistics and nearshoring-driven construction demand.
- Commercial access is relatively good, but the market is highly regional and shaped by local industrial clusters and end-use sectors.



Accessibility & execution risk

- Local partners or direct teams are often needed to cover key regions and clusters.
- Regional focus is critical, as demand and competition vary by corridor.



Ability to win

- Imported and foreign-branded solutions can gain traction where international specifications, sustainability or industrial performance matter.
- Industrial and logistics projects are key entry points for foreign suppliers.
- Strong candidate for a local commercial platform.
- Local manufacturing can be attractive, especially for scale, cost and nearshoring exposure.
- The market is price-conscious, but performance matters in spec-driven applications.



Brazil (#9)

GDP size

\$ 2.3T (#7)

+4.5% vs 2024

Infrastructure spend

\$ 58bn (#5)

+1.3% vs 2024

Population

204m (#4)

+0.7% vs 2024

Urbanisation rate

87% (#2)

Low expansion potential

Political stability

Moderate

**Market archetype:
High-upside / High-
friction Option**


Demand attractiveness



Residential building demand

- Continued demand for housing in major urban centres.
- Government-supported housing initiatives.
- Expansion of middle-income housing segments.
- Renovation and upgrading of existing housing stock.



Non-residential building demand

- Diverse demand across industrial, commercial and public sectors.
- Growth in logistics and distribution infrastructure.
- Expansion of healthcare and institutional facilities.
- Development of commercial real estate in urban areas.



Infrastructure demand

- Brazil is attractive, but rarely simple: scale is large, local competition is meaningful, and Chinese imports add pressure in several categories.



Accessibility & execution risk

- Long-term success usually needs local presence, not just export coverage.
- Better suited to committed entrants than to opportunistic export plays.
- Import conditions can shift, affecting pricing and competitiveness.
- Brazil is a regional market, so winning requires focus on the right states and cities.



Ability to win

- Industrialized and modular building methods are gaining traction in selected segments.
- Local players are well established, making differentiation important.
- Foreign players can win in industrialised, modular, technical or productivity-enhancing solutions where clients seek cost and time savings.



Nigeria (#10)

GDP size

\$ 0.3T (#26)

+9.3% vs 2024

Infrastructure spend

\$ 25bn (#11)

+1.6% vs 2024

Population

178m (#5)

+2.4% vs 2024

Urbanisation rate

52% (#2)

Moderate expansion potential

Political stability

Low

**Market archetype:
High-upside / High-
friction Option**


Demand attractiveness



Residential building demand

- Massive housing deficit in rapidly growing urban areas.
- Strong population growth sustaining long-term demand.
- Need for affordable and scalable housing solutions.
- Expansion of informal housing upgrading initiatives.



Non-residential building demand

- Growth in commercial and retail infrastructure.
- Expansion of healthcare and education facilities.
- Industrial construction linked to economic diversification.
- Development of logistics and distribution infrastructure.



Infrastructure demand

- Potential is high, but this is the hardest market in the top 10 to penetrate consistently from an execution standpoint.
- Foreign manufacturers can find opportunities in infrastructure, logistics, urban growth and technical building systems, but bankability remains a major filter.



Accessibility & execution risk

- Route-to-market depends heavily on strong local partners, strict credit discipline and selective targeting of viable projects.
- Strong local partners are essential to navigate execution complexity.
- Nigeria is best approached project by project, not through broad rollout.
- Risk screening matters, especially on payments, contracts and counterparties.



Ability to win

- Financing and bankability are critical to convert demand into real business.
- Local manufacturing is emerging in some building materials categories.

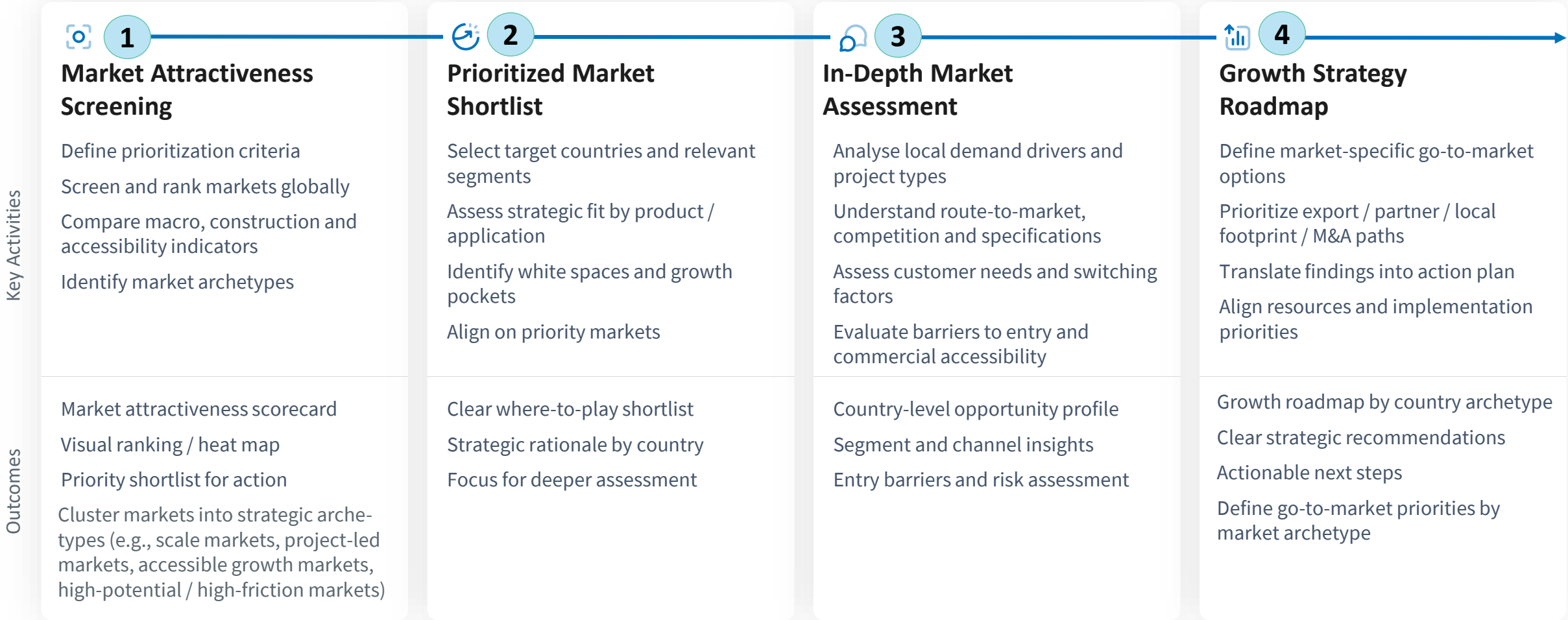
Attractive markets require different route-to-win models – not one global expansion playbook

For B&C manufacturers, market attractiveness only becomes actionable when demand potential is matched with the right investment model, route-to-market and risk appetite.

Archetypes	Markets	B&C Opportunity Logic	How manufacturers should approach	Key Watch-outs
 Accessible growth markets	Poland, Mexico, Australia 	<ul style="list-style-type: none"> Attractive demand with relatively clearer routes-to-market. Good fit for technical, compliant or specification-driven products. Poland and Mexico can also support regional expansion logic; Australia is more of a premium niche market 	<ul style="list-style-type: none"> Focused commercial expansion Distributor and channel strengthening; selective direct sales / key account coverage; Local assembly or manufacturing where justified, especially in Poland and Mexico. 	<ul style="list-style-type: none"> Less transformational than frontier bets; competition can intensify quickly Australia remains constrained by market size and logistics distance
 High-growth strategic bets	India, Indonesia, Philippines 	<ul style="list-style-type: none"> Strongest structural demand stories: urbanization, infrastructure catch-up, housing needs and industrial development. High upside, but monetization requires time and local adaptation. 	<ul style="list-style-type: none"> Enter early but selectively Build local partners and specifier relationships Focus on premium / technical categories Localize progressively where scale and category fit justify it. 	<ul style="list-style-type: none"> Fragmented channels, complex regulation, local-content requirements, low-cost competition and slower ramp-up than headline growth suggests.
 Scale anchors	US, Canada 	<ul style="list-style-type: none"> Large, resilient and bankable demand pools. Growth is driven by infrastructure renewal, housing shortages, industrial reshoring, renovation and energy transition rather than urban catch-up. 	<ul style="list-style-type: none"> Build or acquire a real local footprint; control distribution and service levels Strengthen specification capabilities; adapt offer to codes, regional channels and local sourcing expectations. 	<ul style="list-style-type: none"> Export-only models are increasingly weak Tariffs, domestic-preference dynamics, powerful channels and cyclical stimulus-driven demand can limit foreign entrants.
 High-upside / High-friction Options	Nigeria, Egypt, Brazil 	<ul style="list-style-type: none"> Real structural upside, but less straightforward monetization. Brazil is a large but complex domestic market Egypt and Nigeria are more project-led, relationship-driven and exposed to bankability risk 	<ul style="list-style-type: none"> Participate selectively and work through strong local partners; screen projects and customers carefully Use strict payment / risk discipline; consider local JV or acquisition only with clear category fit. 	<ul style="list-style-type: none"> Bureaucracy, FX exposure, political uncertainty, project bankability and low predictability. These are option markets, not broad rollout plays.

From global screening to actionable growth roadmap

We help building & construction manufacturers move from country attractiveness screening to market-specific growth decisions





GLOBAL CONSULTING, STRATEGY AND M&A SERVICES

Named one of America's Top Management Consulting Firms 2026 by Business Insider, Ducker Carlisle is a global market research, strategy consulting, and M&A advisory firm founded in 1961.

We help industry leaders and private equity firms optimize business performance and accelerate growth, with offices across the US, Germany, France, Portugal, India, and China.

We bring practitioner-level sector depth, proprietary data, and a full continuum of services, all built exclusively for complex industrial markets.

AT A GLANCE:

NAMED TOP MANAGEMENT CONSULTING FIRM

Business Insider 2026

60+ YEARS OF SECTOR EXPERTISE

Founded 1961

8 GLOBAL OFFICES

Across US, Europe, Asia

350+ ANNUAL ENGAGEMENTS

Every year

5 FOCUSED END-MARKETS

Deep sector expertise

**BUSINESS
INSIDER®**

2026
America's Top
Management
Consulting
Firms

PLANT-A
INSIGHTS GROUP

DEEP END- MARKET EXPERTISE

We tackle the challenges of complex industrial markets and deliver the clarity our clients need to grow. We bring decades of sector knowledge, tenured teams, and proven methodologies, translating deep expertise into tailored strategies that drive outcomes for our clients.

Our focus industries share defining characteristics: technical complexity, sophisticated buyer relationships, and sectors undergoing transformation through electrification, AI, and supply chain realignment, precisely where DC's depth creates lasting advantage.



AUTOMOTIVE &
MOTOR VEHICLE



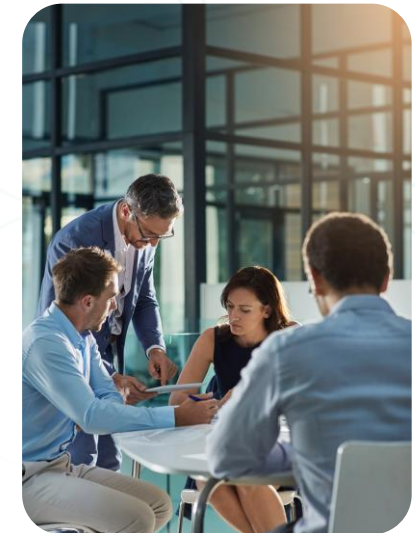
BUILDING, CONSTRUCTION
& INFRASTRUCTURE



HEAVY TRUCK &
EQUIPMENT



INDUSTRIAL AUTOMATION



PRIVATE
EQUITY

BUILDING, CONSTRUCTION & INFRASTRUCTURE

Our European Building & Construction team combines deep sector expertise with strategic and operational excellence. We help manufacturers and system suppliers identify where to play, determine how to win, and translate market insight into practical growth decisions across geographies, segments and routes-to-market.

Building on a strong track record in market intelligence, strategic advisory and transaction support, our team combines analytical rigor, entrepreneurial thinking and hands-on collaboration to help clients capture growth, sharpen competitive positioning and stay ahead in evolving construction markets.



Audrey Courant

Head of Building, Construction & Infrastructure Europe
acourant@duckercarlisle.com
+33-6-22-08-44-07



Marco Fernandez Mejjide

Co-Head of Building, Construction & Infrastructure Europe
mfernandez@duckercarlisle.com



Dr. Constantin Greiner

Co-Head of Building, Construction & Infrastructure Europe
greiner@munich-strategy.com

GLOBAL FOOTPRINT + SCALE

We operate across three continents with offices in every major industrial market. Our global footprint means we deploy quickly, engage local expert networks, and bring sector-specific intelligence to every market we cover - wherever our clients need to grow, compete, or transact.

60+

YEARS OF
EXPERIENCE

350+

ANNUAL
ENGAGEMENTS

10,000

PROPRIETARY DATA
POINTS

190+

CONSULTANTS
WORLDWIDE



NORTH AMERICA

Troy, Michigan (Global HQ) | Boston, Massachusetts



EUROPE

Lisbon, Portugal | Munich, Germany | Paris, France



ASIA-PACIFIC

Bengaluru, India | New Delhi, India | Shanghai, China