Roads and Highways Infrastructure Construction Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Construction & Infrastructure (Real Estate & Construction)
> **Source:** https://www.mordorintelligence.com/industry-reports/roads-and-highways-infrastructure-construction-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.11 trillion
Projected Forecast (2031)	USD 2.11 trillion
Growth Rate (CAGR)	6.49 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Roads and Highways Infrastructure Construction industry](images/chart_2.png)

![Roads and Highways Infrastructure Construction Market Size](images/chart_3.png)

![Roads and Highways Infrastructure Construction Market Share by Component, 2025](images/chart_4.png)

![Roads and Highways Infrastructure Construction Market Share by Investment Source, 2025](images/chart_5.png)

![Roads and Highways Infrastructure Construction Market Growth Rate by Region](images/chart_6.png)

![Roads and Highways Infrastructure Construction Market Concentration](images/chart_7.png)

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

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![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2020 - 2031 |
Market Size (2026) | USD 2.11 Trillion |
Market Size (2031) | USD 2.89 Trillion |
Growth Rate (2026 - 2031) | 6.49 % |

Fastest Growing Market	Asia-Pacific
Largest Market	Asia-Pacific
Market Concentration	Medium

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Roads and Highways Infrastructure Construction Market Analysis by Mordor IntelligenceThe Roads And Highways Infrastructure Construction Market size is projected to be USD 1.97 trillion in 2025, USD 2.11 trillion in 2026, and reach USD 2.89 trillion by 2031, growing at a CAGR of 6.49% from 2026 to 2031.

Public programs are supporting long project pipelines, while concession structures are moving more operating and revenue risk to private partners. Asia-Pacific held 42.60% of the roads and highways infrastructure construction market in 2025 and is also positioned for the fastest growth through 2031. China is prioritizing upgrades under its 15th Five-Year Plan, while India continues to add new corridors and digital road systems. Contractors increasingly need engineering, rehabilitation, and systems integration skills within the same project scope. Land access, material costs, and limited skilled labor remain practical limits on delivery schedules.

Key Report Takeaways* By component, roads accounted for 69.80% of the roads and highways infrastructure construction market share in 2025, while bridges/overpass is forecast to grow at a 7.30% CAGR through 2031.
* By construction type, new construction accounted for 74.20% of the roads and highways infrastructure construction market in 2025, while renovation is forecast to grow at a 7.10% CAGR through 2031.
* By investment source, public investment held 71.50% of the roads and highways infrastructure construction market size in 2025, while public-private partnerships are forecast to grow at a 7.80% CAGR through 2031.
* By type, national programs held 57.40% of the roads and highways infrastructure construction market share in 2025, while the state segment is forecast to grow at a 7.10% CAGR through 2031.
* By geography, Asia-Pacific accounted for 42.60% of the roads and highways infrastructure construction market share in 2025 and is projected to register the highest CAGR of 7.40% through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Roads and Highways Infrastructure Construction Market*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
National Corridor Investment Programs	+2.0%	Global, with core in Asia-Pacific, Europe, and North America	Medium term (2-4 years)
Bridge Rehabilitation Backlogs	+1.2%	North America and Europe core, with spillover to South Asia	Short term (≤ 2 years)
Urban Expressway Expansion	+0.8%	Asia-Pacific and the Middle East, with early gains in South America	Medium term (2-4 years)
Smart Road and Connected Traffic Systems	+0.7%	Europe, North America, and Asia-Pacific, with emerging activity in Middle East and Africa	Long term (≥ 4 years)
Industrial and Trade Corridor Development	+0.7%	Global, concentrated in the Middle East and Africa, South Asia, and South America	Long term (≥ 4 years)
Prefabricated and Recycled Construction Methods	+0.5%	Global, with leading adoption in Europe and India	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The roads and highways infrastructure construction market is moderately concentrated, with a relatively small group of global engineering and construction companies accounting for a significant share of large-scale expressway, motorway, bridge, and concession projects. China Communications Construction Company (CCCC) and China State Construction Engineering Corporation (CSCEC) maintain strong positions across Asia, Africa, and parts of Latin America, supported by integrated engineering capabilities and access to state-backed financing. European contractors, including VINCI, ACS, Skanska, STRABAG, Ferrovial, HOCHTIEF, Eiffage, Balfour Beatty, Colas, Acciona, and Royal BAM Group, compete through extensive concession portfolios, design-build expertise, and experience in complex bridge, tunnel, and urban transportation infrastructure. VINCI's February 2026 exclusive negotiations with the French government for the EUR 364 million (USD 397 million) A154/A120 motorway concession further demonstrate how long-term concession expertise and regulatory relationships strengthen competitive positioning in mature infrastructure markets. While these global players dominate large and technically complex projects, regional and local contractors continue to compete effectively in domestic road programs and smaller public infrastructure contracts.

Technology and integrated project delivery are becoming increasingly important competitive differentiators in the roads and highways infrastructure construction market. Contractors with advanced Building Information Modeling (BIM) capabilities, intelligent transportation systems (ITS) integration, digital project management, and asset lifecycle expertise are better positioned to secure complex infrastructure programs. HOCHTIEF's EUR 450 million (USD 491 million) Berliner Brückenzug A59 expansion contract, awarded in December 2025, illustrates the importance of technical expertise in delivering large projects while maintaining live traffic operations. Leading contractors are also strengthening their capabilities through digital engineering investments, technology partnerships, and acquisitions that improve design optimization, construction efficiency, and long-term asset management. Compliance with internationally recognized standards such as ISO 9001 and ISO 55000 has become increasingly important, particularly in public-private partnership (PPP) procurements across Europe and North America.

Competitive dynamics continue to evolve as governments increasingly bundle financing, design, construction, and long-term operations into integrated procurement models. Large multinational contractors are well-positioned to capitalize on these opportunities because of their financial strength, concession experience, and ability to manage complex, multi-country infrastructure programs. At the same time, regional contractors remain competitive in domestic highway expansion, rehabilitation, and maintenance projects where local market knowledge, regulatory familiarity, and established government relationships provide advantages. As a result, competition in the roads and highways infrastructure construction market is expected to remain centered on financial capacity, technical expertise, concession experience, digital capabilities, and execution performance rather than price alone.

Roads and Highways Infrastructure Construction Industry Leaders* China Communications Construction Company Limited (CCCC)

* China State Construction Engineering Corporation Limited (CSCEC)

* VINCI SA

* ACS, Actividades de Construcción y Servicios, S.A.

* Bechtel Corporation

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Global Roads and Highways Infrastructure Construction Market Report ScopeThe Roads and Highways Infrastructure Construction Report is Segmented by Component (Road, Bridges/Overpass, Tunnels, and Others), Construction Type (New Construction and Renovation), Investment Source (Public, Private, and More), Type (National, State, and Local), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa). The Market Forecasts are Provided in Terms of Value (USD).

By ComponentRoad |
Bridges/Overpass |
Tunnels |
Others |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
Europe | United Kingdom |
| Germany |
| France |
| Italy |
| Spain |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| Australia |
| South Korea |
| SouthEast Asia (Singapore, Malaysia, Thailand, Indonesia, Vietnam, and Philippines) |
| Rest of Asia-Pacific |
South America | Brazil |
| Argentina |
| Rest of South America |
Middle East and Africa | Saudi Arabia |
| United Arab Emirates |
| Turkey |
| South Africa |
| Nigeria |
| Rest of Middle East and Africa |

Frequently Asked Questions

What is the expected growth rate for roads and highways infrastructure construction?

The sector is forecast to grow at a 6.5% CAGR from 2026 to 2031, reaching USD 2,886 billion by 2031.

Which component leads roads and highways infrastructure construction?

Road carriageway construction held 69.8% of activity by component in 2025. Bridges and overpasses are the fastest-growing component at a 7.3% CAGR.

Why are public-private partnerships growing in highway projects?

PPPs are forecast to grow at a 7.8% CAGR as governments use concession models to share financing, operating, and revenue risks.

Which region has the strongest position in road construction?

Asia-Pacific held 42.6% of global activity in 2025 and is expected to record the fastest regional growth through 2031.

How are digital systems changing highway construction?

Smart Road and intelligent transport requirements add communications, data, and systems integration work to conventional civil construction scopes.