

Global Piling Machine Market: Analysis By Product (Piling Rig, Impact Hammer, Vibratory Driver & Others), By Method (Impact Driven, Auger Boring, Rotary Boring, Continuous Flight Auger and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2028

<https://marketpublishers.com/r/G6A4FF0AD2F1EN.html>

Date: December 2023

Pages: 122

Price: US\$ 2,250.00 (Single User License)

ID: G6A4FF0AD2F1EN

Abstracts

The global piling machine market in 2022 was valued at US\$6.21 billion. The market is expected to be worth US\$8.27 billion in 2028. Piling machine is a specialized machinery equipment that drives piles into the soil for foundation support for constructing buildings and other structures. It is mainly used to drill foundations in clay, sandy soil, etc. These machines find applications in various industries including construction, oil & gas, and more.

As construction activities are increasing significantly on account of widespread industrialization and urbanization worldwide, the demand for piling machines is rising as these machines are used to create deep piles that anchor the structure to load-bearing strata deep under the ground, ensuring safety and stability. Moreover, increasing importance for unconventional energy sources such as the wind and solar energy for power generation fueled by regulatory support in China, India, and Japan is expected to promote further the foundation work and thus in turn fuel the demand for piling machines over the forecast period. The market is projected to grow at a CAGR of 4.90% during the forecast period of 2023-2028.

Market Segmentation Analysis:

By Product: The report identifies four segments on the basis of product: Piling Rigs,

Impact Hammer, Vibratory Drivers and Others. Among the products, Piling rigs segment dominated the market in 2022. Piling rigs are equipped with the required machinery and mechanism to drill, drive, or bore piles into the ground. This market's dominance is attributed to the rising demand in construction projects as it offers the necessary support for the construction of homes, bridges and other building projects. In addition, piling rigs are compatible with vibratory hammers, impact hammers, and screw drills, which is likely to drive the segment's expansion in coming years.

By Method: Based on the method, the global piling machine market can be divided into five segments namely, Impact Driven, Auger Boring, Rotary Boring, Continuous Flight Auger and Others. In 2022, due to the growing utilization of this method for low cost and efficient pile installations at sites with hard soil or for final panel levelling, impact-driven piling segment leads the market in 2022. However, continuous flight auger is projected to be the fastest-growing segment owing to the suitability of this method for construction projects that have unstable soil conditions, especially in sites near existing structures, because of its ability to generate low vibrations and noise. Additionally, this method is an efficient solution for light-loaded structures.

By Region: In the report, the global piling machine market is divided into five regions: Asia Pacific (China, India, Japan, South Korea, Australia, and Rest of the Asia Pacific), Europe (Germany, France, UK, Italy, Russia, Netherlands, and rest of Europe), North America (the US, Canada, and Mexico), Middle East & Africa, and South America. In 2022, the Asia Pacific region led the piling machine market, propelled by rapid urbanization, particularly in China and India, and the increasing commercial constructions such as complexes, hospitals, hotels and restaurants, and retail spaces, presence of developing nations such as India and China along with rapid growth in mining and agriculture activities in the region. Moreover, the growing interest in renewable energy sources has led to the expansion of the wind energy sector in China, which further boosted its market dominance. Looking ahead, North America is projected to grow significantly from 2023 to 2028, propelled by growing real estate industry have increased the use of piling machines for drilling platforms and constructing structures, and growing support from the governments of countries in North America for advanced infrastructural setup.

During 2023-2028, the US is forecasted to maintain its lead within North America. This trajectory is largely attributed to the country's expansive construction sector, significant infrastructure investments, and rising number of wind farms. Furthermore, expansion of the mining industry in Mexico in light of favorable regulatory support to facilitate foreign mineral processors for investments at the domestic level is further predicted to

encourage the foundation work, which is expected to augment the demand for piling rigs in the future.

Market Dynamics:

Growth Drivers: The market has been growing over the past few years, due to factors such as growing investment in wind energy sources, swift growth in infrastructure development, rapid urbanization, growing regulatory requirements, upsurge in oil and gas projects, etc. The rising demand due to the flourishing construction activities, driven by widespread industrialization and urbanization, has become a key growth driver for the global piling machine market. Piling machines are crucial in the construction of skyscrapers, high-rise buildings, and commercial complexes. They are used to create deep piles that anchor the structure to load-bearing strata deep under the ground, ensuring safety and stability. Moreover, governments of various countries are investing heavily on enhancing the existing infrastructure, which is further contributing to the demand. Thus, with the rise in construction spending, the demand for piling machines to build high-rise structures is growing, fueling the overall market growth of piling machines.

Challenges: However, some challenges are also impeding the growth of the market such as high prices and low replacement rates, adherence to sound pressure level regulations, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as rising instances of renewable energy initiatives, expansion of mining sector, advent of eco-friendly equipment, technological advancements, increasing utilization in port and harbor construction, etc. Manufacturers of piling machines are concentrating on upgrading their products, in order to enhance their efficiency and provide eco-friendly products. For instance, owing to environmental concerns, hydraulic hammers are gradually replacing diesel hammers. As a result, concerns about noise and dust pollution are reduced, which is anticipated to be a vital factor driving the overall market's growth.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic severely impacted the global piling machines market. The decelerated production of raw materials, disruption in the supply chains, disturbances in trade movements, and decreased demand for new construction projects during the COVID-19 pandemic hindered the piling machines market growth. The delay and halt in

business operations in both developed and developing nations resulted in the downfall in demand for these equipment in various end-use industries which further aggravated the decline of market. However, with the recovery of operations, the demand for piling machines has risen globally.

Post pandemic market is expected to regain its momentum as economic activities resumed and manufacturing activities started across the world. The post-COVID piling machine market is navigating a complex mix of challenges and growth opportunities, relying on strategic innovation and adaptability to thrive in the transformed global construction landscape.

Competitive Landscape and Recent Developments:

The global piling machine market is highly consolidated with a few companies dominating the market in terms of production capacity of piling and drilling rigs. The key players of the global piling machine market are:

Atlas Copco AB

Bauer AG

Liebherr Group

Boart Longyear Limited

Tex Group Limited (BSP-TEX)

Casagrande S.p.A.

Soilmec S.p.A.

Xuzhou Construction Machinery Group Co., Ltd. (XCMG)

China National Machinery Industry Corporation (Sinomach)

Junttan Oy

SANY Heavy Industry Co. Ltd., and

J C Bamford Excavators Ltd.

One of the key strategies of these large players is to venture into partnerships and alliances with drilling service providers and also offer in-house piling services to expand their customer base and strengthen their hold in the global market. For instance, Junttan Oy expanded its product range from pile driving and drilling applications to vibratory hammers in June 2023. The new products will reinforce the company's position as a full-service provider of tubular and H-steel pile driving and extraction solutions, as well as sheet pile driving applications. Whereas, in October 2022, the BSP TEX Company introduced a transportable, radio-controlled, and self-erecting piling rig. The rig is mounted on a JCB base unit and employs a 12.5m single piling mast. The JX

piling rig can drive steel, wood, or concrete piles up to 8m long.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Piling Machine: An Overview

2.1.1 Introduction to Piling Machine

2.1.2 Types of Piling Machine

2.2 Piling Machine Segmentation: An Overview

2.2.1 Piling Machine Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Piling Machine Market: An Analysis

3.1.1 Global Piling Machine Market: An Overview

3.1.2 Global Piling Machine Market by Value

3.1.3 Global Piling Machine Market by Product

3.1.4 Global Piling Machine Market by Method

3.1.5 Global Piling Machine Market by Region

3.2 Global Piling Machine Market: Product Analysis

3.2.1 Global Piling Machine Market by Product: An Overview

3.2.2 Global Piling Rigs Market by Value

3.2.3 Global Impact Hammer Piling Machine Market by Value

3.2.4 Global Vibratory Drivers Piling Machine Market by Value

3.2.5 Global Others Piling Machine Market by Value

3.3 Global Piling Machine Market: Method Analysis

3.3.1 Global Piling Machine Market by Method: An Overview

3.3.2 Global Impact Driven Piling Machine Market by Value

3.3.3 Global Auger Boring Piling Machine Market by Value

3.3.4 Global Rotary Boring Piling Machine Market by Value

3.3.5 Global Continuous Flight Auger Piling Machine Market by Value

3.3.6 Global Others Piling Machine Market by Value

4. REGIONAL MARKET ANALYSIS

4.1 Asia Pacific Piling Machine Market: An Analysis

4.1.1 Asia Pacific Piling Machine Market: An Overview

- 4.1.2 Asia Pacific Piling Machine Market by Value
- 4.1.3 Asia Pacific Piling Machine Market by Region
- 4.1.4 China Piling Machine Market by Value
- 4.1.5 India Piling Machine Market by Value
- 4.1.6 Japan Piling Machine Market by Value
- 4.1.7 South Korea Piling Machine Market by Value
- 4.1.8 Australia Piling Machine Market by Value
- 4.1.9 Rest of Asia Pacific Piling Machine Market by Value
- 4.2 Europe Piling Machine Market: An Analysis
 - 4.2.1 Europe Piling Machine Market: An Overview
 - 4.2.2 Europe Piling Machine Market by Value
 - 4.2.3 Europe Piling Machine Market by Region
 - 4.2.4 Germany Piling Machine Market by Value
 - 4.2.5 France Piling Machine Market by Value
 - 4.2.6 The UK Piling Machine Market by Value
 - 4.2.7 Italy Piling Machine Market by Value
 - 4.2.8 Russia Piling Machine Market by Value
 - 4.2.9 Netherlands Piling Machine Market by Value
 - 4.2.10 Rest of Europe Piling Machine Market by Value
- 4.3 North America Piling Machine Market: An Analysis
 - 4.3.1 North America Piling Machine Market: An Overview
 - 4.3.2 North America Piling Machine Market by Value
 - 4.3.3 North America Piling Machine Market by Region
 - 4.3.4 The US Piling Machine Market by Value
 - 4.3.5 The US Piling Machine Market by Product
 - 4.3.6 The US Piling Rigs, Impact Hammer, Vibratory Drivers & Others Market by Value
 - 4.3.7 Canada Piling Machine Market by Value
 - 4.3.8 Mexico Piling Machine Market by Value
- 4.4 Middle East & Africa Piling Machine Market: An Analysis
 - 4.4.1 Middle East & Africa Piling Machine Market: An Overview
 - 4.4.2 Middle East & Africa Piling Machine Market by Value
- 4.5 South America Piling Machine Market: An Analysis
 - 4.5.1 South America Piling Machine Market: An Overview
 - 4.5.2 South America Piling Machine Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Global Piling Machine Market
 - 5.1.1 Reduction in Construction Activities

5.2 Post-COVID-19 Impact on Global Piling Machine Market

6. MARKET DYNAMICS

6.1 Growth Drivers

- 6.1.1 Flourishing Demand from Construction Activities
- 6.1.2 Growing Investment in Wind Energy Sources
- 6.1.3 Rapid Urbanization
- 6.1.4 Swift Growth in Infrastructure Development
- 6.1.5 Upsurge in Oil and Gas Projects
- 6.1.6 Growing Regulatory Requirements

6.2 Challenges

- 6.2.1 High Prices and Low Replacement Rate
- 6.2.2 Rising Environmental Concerns and Scrutiny
- 6.2.3 Adherence to Sound Pressure Level & Vibration Regulations

6.3 Market Trends

- 6.3.1 Rising Instances of Renewable Energy Initiatives
- 6.3.2 Expansion of Mining Sector
- 6.3.3 Advent of Eco-Friendly Equipment
- 6.3.4 Increasing Utilization in Port and Harbor Construction
- 6.3.5 Technological Advancements of Piling Machine

7. COMPETITIVE LANDSCAPE

7.1 Global Piling Machine Market Players: Recent Developments

8. COMPANY PROFILING

8.1 Atlas Copco AB

- 8.1.1 Business Overview
- 8.1.2 Operating Segments
- 8.1.3 Business Strategies

8.2 Bauer AG

- 8.2.1 Business Overview
- 8.2.2 Operating Segments
- 8.2.3 Business Strategies

8.3 Liebherr Group

- 8.3.1 Business Overview
- 8.3.2 Operating Segments

- 8.3.3 Business Strategies
- 8.4 Boart Longyear Limited
 - 8.4.1 Business Overview
 - 8.4.2 Operating Segments
 - 8.4.3 Business Strategies
- 8.5 Tex Group Limited (BSP-TEX)
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segments
 - 8.5.3 Business Strategies
- 8.6 Casagrande S.p.A.
 - 8.6.1 Business Overview
 - 8.6.2 Business Strategies
- 8.7 Soilmecc S.p.A.
 - 8.7.1 Business Overview
 - 8.7.2 Business Strategies
- 8.8 Xuzhou Construction Machinery Group Co., Ltd. (XCMG)
 - 8.8.1 Business Overview
 - 8.8.2 Business Strategies
- 8.9 China National Machinery Industry Corporation (Sinomach)
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategies
- 8.10 Junttan Oy
 - 8.10.1 Business Overview
 - 8.10.3 Business Strategies
- 8.11 SANY Heavy Industry Co. Ltd
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategies
- 8.12 J C Bamford Excavators Ltd.
 - 8.12.1 Business Overview
 - 8.12.2 Business Strategies

List Of Figures

LIST OF FIGURES

Figure 1: Types of Piling Machine

Figure 2: Piling Machine Segmentation

Figure 3: Global Piling Machine Market by Value; 2018-2022 (US\$ Billion)

Figure 4: Global Piling Machine Market by Value; 2023-2028 (US\$ Billion)

Figure 5: Global Piling Machine Market by Product; 2022 (Percentage, %)

Figure 6: Global Piling Machine Market by Method; 2022 (Percentage, %)

Figure 7: Global Piling Machine Market by Region; 2022 (Percentage, %)

Figure 8: Global Piling Rigs Market by Value; 2018-2022 (US\$ Billion)

Figure 9: Global Piling Rigs Market by Value; 2023-2028 (US\$ Billion)

Figure 10: Global Impact Hammer Piling Machine Market by Value; 2018-2022 (US\$ Billion)

Figure 11: Global Impact Hammer Piling Machine Market by Value; 2023-2028 (US\$ Billion)

Figure 12: Global Vibratory Drivers Piling Machine Market by Value; 2018-2022 (US\$ Billion)

Figure 13: Global Vibratory Drivers Piling Machine Market by Value; 2023-2028 (US\$ Billion)

Figure 14: Global Others Piling Machine Market by Value; 2018-2022 (US\$ Million)

Figure 15: Global Others Piling Machine Market by Value; 2023-2028 (US\$ Million)

Figure 16: Global Impact Driven Piling Machine Market by Value; 2018-2022 (US\$ Billion)

Figure 17: Global Impact Driven Piling Machine Market by Value; 2023-2028 (US\$ Billion)

Figure 18: Global Auger Boring Piling Machine Market by Value; 2018-2022 (US\$ Billion)

Figure 19: Global Auger Boring Piling Machine Market by Value; 2023-2028 (US\$ Billion)

Figure 20: Global Rotary Boring Piling Machine Market by Value; 2018-2022 (US\$ Billion)

Figure 21: Global Rotary Boring Piling Machine Market by Value; 2023-2028 (US\$ Billion)

Figure 22: Global Continuous Flight Auger Piling Machine Market by Value; 2018-2022 (US\$ Million)

Figure 23: Global Continuous Flight Auger Piling Machine Market by Value; 2023-2028 (US\$ Billion)

- Figure 24: Global Others Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 25: Global Others Piling Machine Market by Value; 2023-2028 (US\$ Billion)
- Figure 26: Asia Pacific Piling Machine Market by Value; 2018-2022 (US\$ Billion)
- Figure 27: Asia Pacific Piling Machine Market by Value; 2023-2028 (US\$ Billion)
- Figure 28: Asia Pacific Piling Machine Market by Region; 2022 (Percentage, %)
- Figure 29: China Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 30: China Piling Machine Market by Value; 2023-2028 (US\$ Billion)
- Figure 31: India Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 32: India Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 33: Japan Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 34: Japan Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 35: South Korea Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 36: South Korea Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 37: Australia Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 38: Australia Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 39: Rest of Asia Pacific Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 40: Rest of Asia Pacific Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 41: Europe Piling Machine Market by Value; 2018-2022 (US\$ Billion)
- Figure 42: Europe Piling Machine Market by Value; 2023-2028 (US\$ Billion)
- Figure 43: Europe Piling Machine Market by Region; 2022 (Percentage, %)
- Figure 44: Germany Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 45: Germany Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 46: France Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 47: France Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 48: The UK Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 49: The UK Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 50: Italy Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 51: Italy Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 52: Russia Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 53: Russia Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 54: Netherlands Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 55: Netherlands Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 56: Rest of Europe Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 57: Rest of Europe Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 58: North America Piling Machine Market by Value; 2018-2022 (US\$ Billion)
- Figure 59: North America Piling Machine Market by Value; 2023-2028 (US\$ Billion)
- Figure 60: North America Piling Machine Market by Region; 2022 (Percentage, %)

- Figure 61: The US Piling Machine Market by Value; 2018-2022 (US\$ Billion)
- Figure 62: The US Piling Machine Market by Value; 2023-2028 (US\$ Billion)
- Figure 63: The US Piling Machine Market by Product; 2022 (Percentage, %)
- Figure 64: The US Piling Rigs, Impact Hammer, Vibratory Drivers & Others Market by Value; 2018-2022 (US\$ Million)
- Figure 65: The US Piling Rigs, Impact Hammer, Vibratory Drivers & Others Market by Value; 2023-2028 (US\$ Million)
- Figure 66: Canada Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 67: Canada Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 68: Mexico Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 70: Middle East & Africa Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 71: Middle East & Africa Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 72: South America Piling Machine Market by Value; 2018-2022 (US\$ Million)
- Figure 73: South America Piling Machine Market by Value; 2023-2028 (US\$ Million)
- Figure 74: The US Seasonally Adjusted Value of Construction Put in Place, Feb, 2020-Jun, 2020 (US\$ Billion)
- Figure 75: Global Construction Industry Spending; 2019-2025 (US\$ Trillion)
- Figure 76: Global Investments in Wind Energy Technologies; 2016-2022 (US\$ Billion)
- Figure 77: Global Urban Population; 2016, 2021 & 2050 (Billion)
- Figure 78: Number of Ongoing Airport Construction Projects by Region; January 2023 (US\$ Billion)
- Figure 79: Global Investment in Renewable Energy; 2018-2022 (US\$ Billion)
- Figure 80: Global Coal Demand; 2020-2023 (Million Tonnes)
- Figure 81: Atlas Copco AB Revenues by Segments; 2022 (Percentage, %)
- Figure 82: Bauer AG Revenues by Segments; 2022 (Percentage, %)
- Figure 83: Liebherr Group. Turnover by Segment; 2022 (Percentage, %)
- Figure 84: Boart Longyear Limited Revenue by Segment; 2021 (Percentage, %)
- Figure 85: Tex Group Limited Turnover by Segments; 2021 (Percentage, %)
- Table 1: Global Piling Machine Market: Recent Development by Key Players; 2022

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