

Global Autonomous Underground Trackless Rubber-Tyred Vehicle Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Autonomous Underground Trackless Rubber-Tyred Vehicle market size is expected to reach \$ 687 million by 2032, rising at a market growth of 14.5% CAGR during the forecast period (2026-2032).

Autonomous underground trackless rubber-tyred vehicles are self-propelled wheeled mining vehicles engineered to perform personnel transport, material delivery, loading, haulage or special support tasks in underground roadways with limited or no onboard driving. The product combines an explosion-protected or mine-certified vehicle platform with drive-by-wire steering, braking and propulsion, multi-sensor perception, underground positioning, path planning, vehicle control, wireless communication, fleet dispatch and remote intervention. Commercial configurations range from assisted and tele-remote vehicles to highly autonomous passenger carriers, material trucks, loaders and haulage units. Key specifications include rated payload, gradient capability, turning radius, braking redundancy, localization accuracy, communication latency, battery endurance or diesel power, environmental protection and compliance with mine safety certification. This study focuses on complete vehicles and commercially supplied vehicle-level autonomous systems used in underground coal, metal and non-metal mines.

Key Findings

2025 global sales volume was about 840 vehicles

2025 global average selling price was about US\$310,000 per vehicle

2025 industry capacity utilization was about 72%

2025 industry gross margin was about 32%

Cost structure was chassis and powertrain 31%, sensing and computing 17%, certified electrical systems 14%, software integration 13%, manufacturing and testing 10%, labor and R&D 8%, service and logistics 7%

Market Trends

The market is progressing from remote control and single-vehicle demonstrations toward driverless, multi-vehicle transport systems that can operate across long routes and mixed traffic. Technology development is centered on sensor fusion for dust, darkness and water mist; UWB, inertial and map-based localization where satellite signals are unavailable; redundant drive-by-wire control; and vehicle-road-cloud coordination over 5G or industrial wireless networks. Battery-electric platforms are gaining attention because they reduce underground emissions, heat and ventilation load, while modular autonomy kits allow existing diesel fleets to be upgraded. Buyers increasingly evaluate not only nominal autonomy level but also intervention frequency, route availability, safe-stop performance, cybersecurity, maintainability and integration with mine dispatch. The long-term direction is a standardized mine operating system that coordinates passenger, material, loading and emergency vehicles through common maps, traffic rules and safety interfaces.

Market Dynamics

Demand is shaped by a combination of mine-safety regulation, labor availability, underground network readiness, vehicle replacement cycles and the operating economics of individual mines. Unlike surface autonomous haulage, underground deployment depends on tight integration among the vehicle, roadway infrastructure, communication network, positioning anchors, traffic control and remote operation center. Projects therefore move through staged acceptance, beginning with assisted driving and fixed-route trials before expanding to unmanned operation and multi-vehicle dispatch. Revenue mixes hardware, vehicle integration, software licenses, infrastructure, commissioning and long-term maintenance. This structure favors suppliers that can demonstrate stable operation in real mines and provide lifecycle support, but it also creates longer sales cycles and substantial site-specific engineering.

Competition is shifting from isolated algorithms toward complete, certifiable systems with measurable safety and productivity outcomes.

Drivers

The primary driver is the mining industry's objective of reducing personnel exposure to transport accidents, dust, low visibility and other underground hazards. Intelligent-mine programs are raising requirements for precise positioning, connected transport, collision prevention and remote supervision, creating a natural upgrade path from digital fleet management to autonomous driving. Large mines also face recruitment pressure, high shift-change downtime and demand for more consistent material delivery. Autonomous vehicles can extend productive hours, reduce manual handovers and support centralized dispatch. The expansion of underground 5G, UWB positioning, intrinsically safe sensors and edge computing lowers technical barriers, while battery-electric trackless vehicles create line-controllable platforms that are easier to automate. Repeatable deployment at leading coal mines is gradually converting the technology from a research project into an equipment procurement category.

Restraints

Adoption is constrained by high upfront investment, long mine-safety certification cycles and fragmented underground infrastructure. Roadway width, gradients, water, dust, lighting, magnetic interference and communication blind spots vary by site, so a system validated in one mine cannot always be replicated without new mapping, calibration and safety testing. Mixed traffic involving pedestrians, conventional vehicles and mobile equipment remains difficult to manage, and mine operators often require a remote safety driver during early operation, reducing near-term labor savings. The market also lacks fully unified interfaces across vehicle brands, dispatch platforms and positioning systems. Small mines may not have enough fleet density or route regularity to justify a complete autonomous system. These factors delay purchasing decisions and favor phased retrofits rather than immediate fleet-wide replacement.

Opportunities

The largest opportunity lies in converting fixed-route auxiliary transport from supervised operation to repeatable unmanned service. Passenger shuttles, meal and material delivery, spare-parts transport and routine production support have predictable routes

and schedules, making them suitable entry scenarios. Suppliers can expand account value by offering modular autonomy controllers, mine-certified perception units, positioning infrastructure, dispatch software, remote operation stations and annual service in one package. Battery-electric replacement programs provide another opening because new drive-by-wire platforms can be designed for autonomy from the outset. Mixed-fleet interoperability and lightweight deployment tools will broaden adoption among mines that operate vehicles from several OEMs. Export opportunities should emerge in underground metal and industrial-mineral mines, especially where labor is expensive and safety rules support remote operation, provided suppliers meet local certification and service requirements.

Challenges

The industry must prove that autonomous operation remains safe during communication loss, sensor contamination, unexpected obstacles, map changes, power interruption and emergency evacuation. Functional-safety architecture, cybersecurity and fail-operational braking are critical because a single incident can delay acceptance across the sector. Commercial scaling is also challenging: each project requires mine surveys, route engineering, vehicle adaptation and operator training, while the addressable fleet per site may be limited. Suppliers must balance customized delivery with standardized hardware and software to protect margins. Another risk is technology fragmentation, as mines may separately procure vehicles, positioning, 5G, dispatch and automation from different vendors. Integration disputes and unclear responsibility for system availability can extend commissioning. Successful companies will need strong field engineering, spare-parts support, remote diagnostics and documented performance under actual underground conditions.

Industry Chain Analysis

Upstream inputs include mine-certified chassis, diesel engines or battery systems, steering and braking actuators, explosion-protected electrical components, lidar, radar, cameras, inertial sensors, UWB tags, vehicle controllers, edge computers and wireless communication equipment. Midstream suppliers design the vehicle architecture, integrate drive-by-wire and autonomous functions, conduct explosion-proof and mine-safety certification, develop localization and dispatch software, and perform site commissioning. Specialized engineering firms provide mapping, network planning, roadway sensing and remote-control centers. Downstream customers are coal, metal

and non-metal mine operators, engineering contractors and mining groups that deploy the vehicles for passenger transport, material movement, loading, haulage and emergency support. After-sales maintenance, software updates, sensor calibration and operational data services are increasingly important because lifecycle availability, rather than vehicle delivery alone, determines customer economics.

Value Chain Analysis

Value creation is concentrated in four layers. The physical vehicle and certified components provide durability, mobility and regulatory access; the autonomous stack converts perception, localization and control into safe vehicle behavior; the system layer coordinates traffic, dispatch, remote intervention and production data; and field operations convert technology into measurable availability and labor reduction. Chassis manufacturing is comparatively asset-intensive and price competitive, while mine-certified sensing, control algorithms, safety validation and system integration command higher margins. Customer switching costs rise after maps, route rules, interfaces and maintenance procedures are embedded in daily operation. Suppliers with reusable software, standardized retrofit kits and remote diagnostics can improve delivery efficiency across projects. However, localized service remains indispensable because underground conditions change frequently and failures must be resolved quickly to avoid interrupting production.

Segment Insights

By automation level, assisted and tele-remote products still represent the broadest installed base because they require less roadway reconstruction and allow operators to retain direct control in exceptional conditions. Highly autonomous vehicles are the fastest-developing segment, especially on fixed passenger and material routes where traffic rules can be standardized. By powertrain, explosion-proof diesel remains important in existing fleets, but battery-electric vehicles are gaining share in new projects because lower emissions and heat reduce ventilation burden and their electronic control architecture supports autonomous functions. By rated load, vehicles below 5 tonnes serve personnel and light-material transport, 5 to 10 tonne platforms address general engineering logistics, and larger units are used for heavy material, loading and haulage. The most attractive products combine a certified vehicle platform, modular autonomy and a scalable dispatch system rather than selling any one layer separately.

Downstream Market Opportunities

Coal mines provide the clearest near-term opportunity because auxiliary transport routes are extensive and safety-driven automation policies are relatively mature. Fixed-route personnel transport can establish positioning, communication and traffic-control infrastructure, after which the same platform can be extended to meals, consumables, spare parts and tools. Underground metal mines offer higher-value opportunities for autonomous loaders and haulage trucks where hazardous stopes and labor costs justify remote operation. Engineering contractors and large mining groups are potential fleet-level buyers that can replicate a validated architecture across several sites. Commercial success depends on translating technical capability into customer outcomes such as fewer exposed workers, lower intervention rates, higher route availability, predictable delivery cycles and reduced ventilation or fuel costs. Service contracts, software upgrades and operational analytics can turn one-time equipment sales into recurring revenue.

Regional Insights

China is the most active market for autonomous underground trackless transport in coal mines, supported by intelligent-mine construction, large underground fleets and rapid deployment of 5G and UWB infrastructure. Early projects are concentrated in major coal-producing regions where large mines can fund integrated trials and standardize routes. Northern Europe, Australia, Canada and parts of Latin America have deeper experience with autonomous underground loading and haulage in hard-rock mines, led by established equipment OEMs and high labor costs. Europe remains strong in certified mining equipment and automation platforms, while North America emphasizes safety systems, remote operation and lifecycle service. Emerging mining regions in Central Asia, Africa and Southeast Asia offer long-term potential, but adoption will depend on infrastructure, local maintenance and financing. Regional competition therefore differs between coal-mine auxiliary transport in China and hard-rock production equipment in international markets.

Competitive Landscape Analysis

The competitive landscape combines global underground-equipment leaders and

Chinese mine-intelligence specialists. Sandvik, Epiroc and Caterpillar compete through installed fleets, proven underground platforms, automation software and global service networks. China Coal Technology & Engineering Group, including its Changzhou research and manufacturing operations, has strong mine certification, vehicle engineering and domestic project access. Nanjing Bestway is moving from transport management into certified intelligent vehicles and industrialized production, while Qingdao Huituo has demonstrated full-stack underground unmanned transport. DeepBlue and Zelos contribute autonomous-driving algorithms and vehicle platforms through joint development. Precise market-share ranking is not sufficiently supported because many projects are customized and combine several suppliers. Competitive advantage is best assessed by mine-safety certification, autonomous mileage, intervention frequency, mixed-fleet capability, commissioning speed and long-term field support.

Report Scope

This report studies the global Autonomous Underground Trackless Rubber-Tyred Vehicle production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Autonomous Underground Trackless Rubber-Tyred Vehicle and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Autonomous Underground Trackless Rubber-Tyred Vehicle that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Autonomous Underground Trackless Rubber-Tyred Vehicle total production and demand, 2021-2032, (Units)

Global Autonomous Underground Trackless Rubber-Tyred Vehicle total production value, 2021-2032, (USD Million)

Global Autonomous Underground Trackless Rubber-Tyred Vehicle production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Autonomous Underground Trackless Rubber-Tyred Vehicle consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Autonomous Underground Trackless Rubber-Tyred Vehicle domestic production, consumption, key domestic manufacturers and share

Global Autonomous Underground Trackless Rubber-Tyred Vehicle production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Autonomous Underground Trackless Rubber-Tyred Vehicle production by Automation Level, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Autonomous Underground Trackless Rubber-Tyred Vehicle production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Autonomous Underground Trackless Rubber-Tyred Vehicle market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Sandvik AB (SE), Epiroc AB (SE), Caterpillar Inc. (US), China Coal Technology & Engineering Group Corp. (CN), Nanjing Bestway Intelligent Control Technology Co., Ltd. (CN), Qingdao Huituo Intelligent Machine Co., Ltd. (CN), DeepBlue Artificial Intelligence Technology (Shanghai) Co., Ltd. (CN), Zelos (Suzhou) Intelligent Technology Co., Ltd. (CN), etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Autonomous Underground Trackless Rubber-Tyred Vehicle market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Automation Level, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Autonomous Underground Trackless Rubber-Tyred Vehicle Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Autonomous Underground Trackless Rubber-Tyred Vehicle Market, Segmentation by Automation Level:

Remote-Controlled and Assisted Driving

Conditionally Autonomous

Other

Global Autonomous Underground Trackless Rubber-Tyred Vehicle Market, Segmentation by Powertrain:

Explosion-Proof Diesel

Battery Electric

Hybrid and Other Powertrains

Global Autonomous Underground Trackless Rubber-Tyred Vehicle Market, Segmentation by Rated Load Capacity:

<5 t

5-10 t

>10 t

Global Autonomous Underground Trackless Rubber-Tyred Vehicle Market, Segmentation by Application:

Mining

Engineering and Construction

Electric Power

Geological Exploration and Scientific Research

Others

Companies Profiled:

Sandvik AB (SE)

Epiroc AB (SE)

Caterpillar Inc. (US)

China Coal Technology & Engineering Group Corp. (CN)

Nanjing Bestway Intelligent Control Technology Co., Ltd. (CN)

Qingdao Huituo Intelligent Machine Co., Ltd. (CN)

DeepBlue Artificial Intelligence Technology (Shanghai) Co., Ltd. (CN)

Zelos (Suzhou) Intelligent Technology Co., Ltd. (CN)

Key Questions Answered

1. How big is the global Autonomous Underground Trackless Rubber-Tyred Vehicle market?
2. What is the demand of the global Autonomous Underground Trackless Rubber-Tyred Vehicle market?
3. What is the year over year growth of the global Autonomous Underground Trackless Rubber-Tyred Vehicle market?
4. What is the total value of the global Autonomous Underground Trackless Rubber-Tyred Vehicle market?
5. Who are the Major Players in the global Autonomous Underground Trackless Rubber-Tyred Vehicle market?
6. What are the growth factors driving the market demand?

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