

Global Coal Mine Roadway Development Equipment Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Coal Mine Roadway Development Equipment market size was valued at US\$ 1564 million in 2025 and is forecast to a readjusted size of US\$ 2133 million by 2032 with a CAGR of 4.6% during review period.

Coal mine roadway development equipment refers to the core mechanized equipment used for the construction of development, preparation, and panel roadways in underground coal mines. It is primarily responsible for coal and rock cutting, breaking, loading, and continuous roadway advance.

Based on differences in rock-breaking methods, excavation profiles, and the degree of integration between excavation and ground support, the market currently mainly comprises three categories: roadheaders, bolter miners, and mining tunnel boring machines (Mining TBMs). Roadheaders use a movable cutting boom to drive the cutting head for partial-face excavation and simultaneously perform loading and conveying. They are the most widely used conventional mechanized roadway development equipment in coal roadways, mixed coal-rock roadways, and some rock roadways. Bolter miners further integrate coal/rock cutting, material handling, and roof/rib bolting or cable-bolting functions into a single machine or core equipment platform, enabling parallel or closely coordinated excavation and support operations. They are mainly used in coal and mixed coal-rock roadways where high roadway development efficiency is required. Mining TBMs use a full-face rotating cutterhead and disc-cutter system to mechanically excavate the entire roadway cross-section in a single pass, making them more suitable for rapid development of long-distance rock and hard-rock roadways with relatively stable cross-sections.

In the international market, coal mine roadway development equipment has evolved into a multi-technology product system adapted to different geological conditions and mining methods. International mining-equipment suppliers such as Sandvik and Komatsu (Joy) have long been active in roadheaders and bolter miners. Roadheaders are mainly used in coal roadways, mixed coal-rock conditions, and medium-strength rock formations, while bolter miners place greater emphasis on the integration of cutting and bolting. In long-distance hard-rock roadway development, full-face TBMs are increasingly being used as an important complement to conventional drill-and-blast methods and partial-face cutting equipment. These different technology routes are not simple substitutes for one another; equipment selection is primarily determined by coal and rock strength, roadway length and cross-section, support requirements, construction organization, and the mine's requirements for continuous and intelligent roadway development.

China's coal mine roadway development equipment market has already established a relatively complete domestic equipment supply system and is continuing to upgrade from conventional roadheaders toward integrated cutting-and-bolting, full-face rapid excavation, and intelligent system solutions. In roadheaders, companies such as SANY Heavy Equipment, XCMG, Shanxi Tiandi Coal Mining Machinery, Shanghai Chuangli, Shijiazhuang Coal Mining Machinery, Taiyuan Heavy Industry, and Jiangxi Siton have developed relatively comprehensive EBZ and related product series. In bolter miners, domestic suppliers including CRCHI, SANY Heavy Equipment, XCMG, Shanxi Tiandi Coal Mining Machinery, Shijiazhuang Coal Mining Machinery, and Jiangxi Siton continue to expand their product portfolios, while international suppliers such as Komatsu (Joy) and Sandvik still retain a certain technological and installed-base presence. In mining TBMs, Chinese companies including China Railway Engineering Equipment Group (CREG), CRCHI, Northern Heavy Industries, CCCC Tianhe, and Jiangsu Shendun have developed independent R&D capabilities and project experience in full-face roadway boring equipment for coal-mine rock roadways, giving this segment a relatively high degree of localization.

Based on our research, the global coal mine roadway development equipment market has evolved into a multi-technology structure centred on roadheaders, bolter miners and mining TBMs, rather than a single tunnelling-equipment market. Roadheaders remain the most mature and widely deployed category, with the flexibility to work in coal, semi-coal-rock and selected rock roadways and with the broadest installed-base and supplier footprint. Bolter miners address a different productivity bottleneck by combining excavation, material handling and ground support within one machine, reducing the interruption between cutting and bolting and improving roadway-development efficiency

in applications where rapid panel development is critical. Mining TBMs occupy a smaller but strategically important niche, particularly in long, relatively stable rock roadways and mine-access developments where full-face mechanized excavation can justify the higher capital cost. These technologies are therefore complementary rather than directly interchangeable. Sandvik's current MB670-1, for example, is designed to cut, support and gather material simultaneously in longwall coal-mine development, while Komatsu's miner-bolter portfolio integrates cutting with roof and rib bolting. At the other end of the technology spectrum, Robbins' 8.0-m Crossover XRE TBM at the Grosvenor coal mine in Australia demonstrated the applicability of full-face boring to gaseous coal-mine access tunnels. This diversity of operating principles means that equipment selection will continue to depend heavily on roadway length and cross-section, coal and rock competency, support requirements, methane conditions, mine layout and the economics of continuous advance.

From the demand perspective, future market growth should be viewed primarily as an equipment-upgrade and technology-mix story rather than a direct proxy for global coal-volume growth. The IEA reports that global coal demand rose only about 0.4% in 2025 and expects demand to remain broadly on a plateau before edging lower by the end of the decade. The geographic picture nevertheless remains uneven: China continues to dominate global coal use, while India is expected to provide the largest absolute increase in demand through 2030 and Southeast Asia also remains a growth region. Consequently, mature coal markets are likely to generate equipment demand mainly through replacement, productivity enhancement, safety requirements and automation, whereas selected emerging Asian markets may still contribute incremental units through mine development and capacity expansion.

Report Scope

This report is a detailed and comprehensive analysis for global Coal Mine Roadway Development Equipment market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Coal Mine Roadway Development Equipment market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Coal Mine Roadway Development Equipment market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Coal Mine Roadway Development Equipment market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Coal Mine Roadway Development Equipment market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Coal Mine Roadway Development Equipment
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Coal Mine Roadway Development Equipment market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include SANY Heavy Equipment Co., Ltd., XCMG Construction Machinery Co., Ltd., China Coal Technology & Engineering Group Corp. (CCTEG), Shanghai Chuangli Group Co., Ltd., Shijiazhuang Coal Mining Machinery Co., Ltd., Taiyuan Heavy Industry Co., Ltd., Jiangxi Siton Machinery Manufacturing Co., Ltd., Kaisheng Heavy Industry Co., Ltd., Shanxi Meijia Mining Equipment Co., Ltd., Jiamusi Coal Mining Machinery Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Coal Mine Roadway Development Equipment market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

Roadheaders

Bolter Miners

Mining TBMs

Market segment by Application

Coal-dominant Roadways

Mixed Coal-Rock Roadways

Rock-dominant Roadways

Major players covered

SANY Heavy Equipment Co., Ltd.

XCMG Construction Machinery Co., Ltd.

China Coal Technology & Engineering Group Corp. (CCTEG)

Shanghai Chuangli Group Co., Ltd.

Shijiazhuang Coal Mining Machinery Co., Ltd.

Taiyuan Heavy Industry Co., Ltd.

Jiangxi Siton Machinery Manufacturing Co., Ltd.

Kaisheng Heavy Industry Co., Ltd.

Shanxi Meijia Mining Equipment Co., Ltd.

Jiamusi Coal Mining Machinery Co., Ltd.

Linzhou Heavy Machinery Group Co., Ltd.

Shanghai Kemei Electromechanical Co., Ltd.

China Railway Construction Heavy Industry Corporation Limited (CRCHI)

Hebei Jinglong Intelligent Equipment Co., Ltd.

China Railway Engineering Equipment Group Co., Ltd. (CREG)

Northern Heavy Industries Group Co., Ltd. (NHI)

Jiangsu Shendun Engineering Machinery Co., Ltd.

CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd.

Liaoning Censcience Industry Co., Ltd.

Sandvik AB

Komatsu Ltd.

Grenevia S.A. (FAMUR)

Mitsui Miike Machinery Co., Ltd.

Corum Group

JSC Kopeysk Machine-Building Plant

NKMZ Group

MSB GmbH & Co. KG (IBS Mining and Tunnelling)

Antraquip Corporation

BBM Group

The Robbins Company

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Coal Mine Roadway Development Equipment product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Coal Mine Roadway Development Equipment, with price, sales quantity, revenue, and global market share of Coal Mine Roadway Development Equipment from 2021 to 2026.

Chapter 3, the Coal Mine Roadway Development Equipment competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Coal Mine Roadway Development Equipment breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Coal Mine Roadway Development Equipment market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Coal Mine Roadway Development Equipment.

Chapter 14 and 15, to describe Coal Mine Roadway Development Equipment sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Coal Mine Roadway Development Equipment Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Roadheaders

1.3.3 Bolter Miners

1.3.4 Mining TBMs

1.4 Market Analysis by Application

1.4.1 Overview: Global Coal Mine Roadway Development Equipment Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.4.2 Coal-dominant Roadways

1.4.3 Mixed Coal-Rock Roadways

1.4.4 Rock-dominant Roadways

1.5 Global Coal Mine Roadway Development Equipment Market Size & Forecast

1.5.1 Global Coal Mine Roadway Development Equipment Consumption Value (2021 & 2025 & 2032)

1.5.2 Global Coal Mine Roadway Development Equipment Sales Quantity (2021-2032)

1.5.3 Global Coal Mine Roadway Development Equipment Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 SANY Heavy Equipment Co., Ltd.

2.1.1 SANY Heavy Equipment Co., Ltd. Details

2.1.2 SANY Heavy Equipment Co., Ltd. Major Business

2.1.3 SANY Heavy Equipment Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.1.4 SANY Heavy Equipment Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 SANY Heavy Equipment Co., Ltd. Recent Developments/Updates

2.2 XCMG Construction Machinery Co., Ltd.

2.2.1 XCMG Construction Machinery Co., Ltd. Details

2.2.2 XCMG Construction Machinery Co., Ltd. Major Business

2.2.3 XCMG Construction Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.2.4 XCMG Construction Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 XCMG Construction Machinery Co., Ltd. Recent Developments/Updates

2.3 China Coal Technology & Engineering Group Corp. (CCTEG)

2.3.1 China Coal Technology & Engineering Group Corp. (CCTEG) Details

2.3.2 China Coal Technology & Engineering Group Corp. (CCTEG) Major Business

2.3.3 China Coal Technology & Engineering Group Corp. (CCTEG) Coal Mine Roadway Development Equipment Product and Services

2.3.4 China Coal Technology & Engineering Group Corp. (CCTEG) Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 China Coal Technology & Engineering Group Corp. (CCTEG) Recent Developments/Updates

2.4 Shanghai Chuangli Group Co., Ltd.

2.4.1 Shanghai Chuangli Group Co., Ltd. Details

2.4.2 Shanghai Chuangli Group Co., Ltd. Major Business

2.4.3 Shanghai Chuangli Group Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.4.4 Shanghai Chuangli Group Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Shanghai Chuangli Group Co., Ltd. Recent Developments/Updates

2.5 Shijiazhuang Coal Mining Machinery Co., Ltd.

2.5.1 Shijiazhuang Coal Mining Machinery Co., Ltd. Details

2.5.2 Shijiazhuang Coal Mining Machinery Co., Ltd. Major Business

2.5.3 Shijiazhuang Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.5.4 Shijiazhuang Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Shijiazhuang Coal Mining Machinery Co., Ltd. Recent Developments/Updates

2.6 Taiyuan Heavy Industry Co., Ltd.

2.6.1 Taiyuan Heavy Industry Co., Ltd. Details

2.6.2 Taiyuan Heavy Industry Co., Ltd. Major Business

2.6.3 Taiyuan Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.6.4 Taiyuan Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.6.5 Taiyuan Heavy Industry Co., Ltd. Recent Developments/Updates
- 2.7 Jiangxi Siton Machinery Manufacturing Co., Ltd.
 - 2.7.1 Jiangxi Siton Machinery Manufacturing Co., Ltd. Details
 - 2.7.2 Jiangxi Siton Machinery Manufacturing Co., Ltd. Major Business
 - 2.7.3 Jiangxi Siton Machinery Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Product and Services
 - 2.7.4 Jiangxi Siton Machinery Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Jiangxi Siton Machinery Manufacturing Co., Ltd. Recent Developments/Updates
- 2.8 Kaisheng Heavy Industry Co., Ltd.
 - 2.8.1 Kaisheng Heavy Industry Co., Ltd. Details
 - 2.8.2 Kaisheng Heavy Industry Co., Ltd. Major Business
 - 2.8.3 Kaisheng Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Product and Services
 - 2.8.4 Kaisheng Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Kaisheng Heavy Industry Co., Ltd. Recent Developments/Updates
- 2.9 Shanxi Meijia Mining Equipment Co., Ltd.
 - 2.9.1 Shanxi Meijia Mining Equipment Co., Ltd. Details
 - 2.9.2 Shanxi Meijia Mining Equipment Co., Ltd. Major Business
 - 2.9.3 Shanxi Meijia Mining Equipment Co., Ltd. Coal Mine Roadway Development Equipment Product and Services
 - 2.9.4 Shanxi Meijia Mining Equipment Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Shanxi Meijia Mining Equipment Co., Ltd. Recent Developments/Updates
- 2.10 Jiamusi Coal Mining Machinery Co., Ltd.
 - 2.10.1 Jiamusi Coal Mining Machinery Co., Ltd. Details
 - 2.10.2 Jiamusi Coal Mining Machinery Co., Ltd. Major Business
 - 2.10.3 Jiamusi Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services
 - 2.10.4 Jiamusi Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Jiamusi Coal Mining Machinery Co., Ltd. Recent Developments/Updates
- 2.11 Linzhou Heavy Machinery Group Co., Ltd.
 - 2.11.1 Linzhou Heavy Machinery Group Co., Ltd. Details
 - 2.11.2 Linzhou Heavy Machinery Group Co., Ltd. Major Business

2.11.3 Linzhou Heavy Machinery Group Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.11.4 Linzhou Heavy Machinery Group Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 Linzhou Heavy Machinery Group Co., Ltd. Recent Developments/Updates
2.12 Shanghai Kemei Electromechanical Co., Ltd.

2.12.1 Shanghai Kemei Electromechanical Co., Ltd. Details

2.12.2 Shanghai Kemei Electromechanical Co., Ltd. Major Business

2.12.3 Shanghai Kemei Electromechanical Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.12.4 Shanghai Kemei Electromechanical Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Shanghai Kemei Electromechanical Co., Ltd. Recent Developments/Updates
2.13 China Railway Construction Heavy Industry Corporation Limited (CRCHI)

2.13.1 China Railway Construction Heavy Industry Corporation Limited (CRCHI) Details

2.13.2 China Railway Construction Heavy Industry Corporation Limited (CRCHI) Major Business

2.13.3 China Railway Construction Heavy Industry Corporation Limited (CRCHI) Coal Mine Roadway Development Equipment Product and Services

2.13.4 China Railway Construction Heavy Industry Corporation Limited (CRCHI) Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 China Railway Construction Heavy Industry Corporation Limited (CRCHI) Recent Developments/Updates

2.14 Hebei Jinglong Intelligent Equipment Co., Ltd.

2.14.1 Hebei Jinglong Intelligent Equipment Co., Ltd. Details

2.14.2 Hebei Jinglong Intelligent Equipment Co., Ltd. Major Business

2.14.3 Hebei Jinglong Intelligent Equipment Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.14.4 Hebei Jinglong Intelligent Equipment Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Hebei Jinglong Intelligent Equipment Co., Ltd. Recent Developments/Updates
2.15 China Railway Engineering Equipment Group Co., Ltd. (CREG)

2.15.1 China Railway Engineering Equipment Group Co., Ltd. (CREG) Details

2.15.2 China Railway Engineering Equipment Group Co., Ltd. (CREG) Major Business

2.15.3 China Railway Engineering Equipment Group Co., Ltd. (CREG) Coal Mine Roadway Development Equipment Product and Services

2.15.4 China Railway Engineering Equipment Group Co., Ltd. (CREG) Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 China Railway Engineering Equipment Group Co., Ltd. (CREG) Recent Developments/Updates

2.16 Northern Heavy Industries Group Co., Ltd. (NHI)

2.16.1 Northern Heavy Industries Group Co., Ltd. (NHI) Details

2.16.2 Northern Heavy Industries Group Co., Ltd. (NHI) Major Business

2.16.3 Northern Heavy Industries Group Co., Ltd. (NHI) Coal Mine Roadway Development Equipment Product and Services

2.16.4 Northern Heavy Industries Group Co., Ltd. (NHI) Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 Northern Heavy Industries Group Co., Ltd. (NHI) Recent Developments/Updates

2.17 Jiangsu Shendun Engineering Machinery Co., Ltd.

2.17.1 Jiangsu Shendun Engineering Machinery Co., Ltd. Details

2.17.2 Jiangsu Shendun Engineering Machinery Co., Ltd. Major Business

2.17.3 Jiangsu Shendun Engineering Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.17.4 Jiangsu Shendun Engineering Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 Jiangsu Shendun Engineering Machinery Co., Ltd. Recent Developments/Updates

2.18 CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd.

2.18.1 CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Details

2.18.2 CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Major Business

2.18.3 CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.18.4 CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Recent Developments/Updates

2.19 Liaoning Censcience Industry Co., Ltd.

2.19.1 Liaoning Censcience Industry Co., Ltd. Details

2.19.2 Liaoning Censcience Industry Co., Ltd. Major Business

2.19.3 Liaoning Censcience Industry Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.19.4 Liaoning Censcience Industry Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 Liaoning Censcience Industry Co., Ltd. Recent Developments/Updates

2.20 Sandvik AB

2.20.1 Sandvik AB Details

2.20.2 Sandvik AB Major Business

2.20.3 Sandvik AB Coal Mine Roadway Development Equipment Product and Services

2.20.4 Sandvik AB Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 Sandvik AB Recent Developments/Updates

2.21 Komatsu Ltd.

2.21.1 Komatsu Ltd. Details

2.21.2 Komatsu Ltd. Major Business

2.21.3 Komatsu Ltd. Coal Mine Roadway Development Equipment Product and Services

2.21.4 Komatsu Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.21.5 Komatsu Ltd. Recent Developments/Updates

2.22 Grenevia S.A. (FAMUR)

2.22.1 Grenevia S.A. (FAMUR) Details

2.22.2 Grenevia S.A. (FAMUR) Major Business

2.22.3 Grenevia S.A. (FAMUR) Coal Mine Roadway Development Equipment Product and Services

2.22.4 Grenevia S.A. (FAMUR) Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.22.5 Grenevia S.A. (FAMUR) Recent Developments/Updates

2.23 Mitsui Miike Machinery Co., Ltd.

2.23.1 Mitsui Miike Machinery Co., Ltd. Details

2.23.2 Mitsui Miike Machinery Co., Ltd. Major Business

2.23.3 Mitsui Miike Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

2.23.4 Mitsui Miike Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.23.5 Mitsui Miike Machinery Co., Ltd. Recent Developments/Updates

2.24 Corum Group

2.24.1 Corum Group Details

2.24.2 Corum Group Major Business

2.24.3 Corum Group Coal Mine Roadway Development Equipment Product and Services

2.24.4 Corum Group Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.24.5 Corum Group Recent Developments/Updates

2.25 JSC Kopeysk Machine-Building Plant

2.25.1 JSC Kopeysk Machine-Building Plant Details

2.25.2 JSC Kopeysk Machine-Building Plant Major Business

2.25.3 JSC Kopeysk Machine-Building Plant Coal Mine Roadway Development Equipment Product and Services

2.25.4 JSC Kopeysk Machine-Building Plant Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.25.5 JSC Kopeysk Machine-Building Plant Recent Developments/Updates

2.26 NKMZ Group

2.26.1 NKMZ Group Details

2.26.2 NKMZ Group Major Business

2.26.3 NKMZ Group Coal Mine Roadway Development Equipment Product and Services

2.26.4 NKMZ Group Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.26.5 NKMZ Group Recent Developments/Updates

2.27 MSB GmbH & Co. KG (IBS Mining and Tunnelling)

2.27.1 MSB GmbH & Co. KG (IBS Mining and Tunnelling) Details

2.27.2 MSB GmbH & Co. KG (IBS Mining and Tunnelling) Major Business

2.27.3 MSB GmbH & Co. KG (IBS Mining and Tunnelling) Coal Mine Roadway Development Equipment Product and Services

2.27.4 MSB GmbH & Co. KG (IBS Mining and Tunnelling) Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.27.5 MSB GmbH & Co. KG (IBS Mining and Tunnelling) Recent Developments/Updates

2.28 Antraquip Corporation

2.28.1 Antraquip Corporation Details

2.28.2 Antraquip Corporation Major Business

2.28.3 Antraquip Corporation Coal Mine Roadway Development Equipment Product

and Services

2.28.4 Antraquip Corporation Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.28.5 Antraquip Corporation Recent Developments/Updates

2.29 BBM Group

2.29.1 BBM Group Details

2.29.2 BBM Group Major Business

2.29.3 BBM Group Coal Mine Roadway Development Equipment Product and Services

2.29.4 BBM Group Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.29.5 BBM Group Recent Developments/Updates

2.30 The Robbins Company

2.30.1 The Robbins Company Details

2.30.2 The Robbins Company Major Business

2.30.3 The Robbins Company Coal Mine Roadway Development Equipment Product and Services

2.30.4 The Robbins Company Coal Mine Roadway Development Equipment Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.30.5 The Robbins Company Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: COAL MINE ROADWAY DEVELOPMENT EQUIPMENT BY MANUFACTURER

3.1 Global Coal Mine Roadway Development Equipment Sales Quantity by Manufacturer (2021-2026)

3.2 Global Coal Mine Roadway Development Equipment Revenue by Manufacturer (2021-2026)

3.3 Global Coal Mine Roadway Development Equipment Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Coal Mine Roadway Development Equipment by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Coal Mine Roadway Development Equipment Manufacturer Market Share in 2025

3.4.3 Top 6 Coal Mine Roadway Development Equipment Manufacturer Market Share in 2025

3.5 Coal Mine Roadway Development Equipment Market: Overall Company Footprint Analysis

- 3.5.1 Coal Mine Roadway Development Equipment Market: Region Footprint
- 3.5.2 Coal Mine Roadway Development Equipment Market: Company Product Type Footprint
- 3.5.3 Coal Mine Roadway Development Equipment Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Coal Mine Roadway Development Equipment Market Size by Region
 - 4.1.1 Global Coal Mine Roadway Development Equipment Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Coal Mine Roadway Development Equipment Consumption Value by Region (2021-2032)
 - 4.1.3 Global Coal Mine Roadway Development Equipment Average Price by Region (2021-2032)
- 4.2 North America Coal Mine Roadway Development Equipment Consumption Value (2021-2032)
- 4.3 Europe Coal Mine Roadway Development Equipment Consumption Value (2021-2032)
- 4.4 Asia-Pacific Coal Mine Roadway Development Equipment Consumption Value (2021-2032)
- 4.5 South America Coal Mine Roadway Development Equipment Consumption Value (2021-2032)
- 4.6 Middle East & Africa Coal Mine Roadway Development Equipment Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2032)
- 5.2 Global Coal Mine Roadway Development Equipment Consumption Value by Type (2021-2032)
- 5.3 Global Coal Mine Roadway Development Equipment Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2032)

6.2 Global Coal Mine Roadway Development Equipment Consumption Value by Application (2021-2032)

6.3 Global Coal Mine Roadway Development Equipment Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2032)

7.2 North America Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2032)

7.3 North America Coal Mine Roadway Development Equipment Market Size by Country

7.3.1 North America Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2032)

7.3.2 North America Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2032)

8.2 Europe Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2032)

8.3 Europe Coal Mine Roadway Development Equipment Market Size by Country

8.3.1 Europe Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2032)

8.3.2 Europe Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2032)

9.2 Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2032)

9.3 Asia-Pacific Coal Mine Roadway Development Equipment Market Size by Region

9.3.1 Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Coal Mine Roadway Development Equipment Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2032)

10.2 South America Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2032)

10.3 South America Coal Mine Roadway Development Equipment Market Size by Country

10.3.1 South America Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2032)

10.3.2 South America Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity

by Application (2021-2032)

11.3 Middle East & Africa Coal Mine Roadway Development Equipment Market Size by Country

11.3.1 Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Coal Mine Roadway Development Equipment Market Drivers

12.2 Coal Mine Roadway Development Equipment Market Restraints

12.3 Coal Mine Roadway Development Equipment Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Coal Mine Roadway Development Equipment and Key Manufacturers

13.2 Manufacturing Costs Percentage of Coal Mine Roadway Development Equipment

13.3 Coal Mine Roadway Development Equipment Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Coal Mine Roadway Development Equipment Typical Distributors

14.3 Coal Mine Roadway Development Equipment Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Coal Mine Roadway Development Equipment Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Coal Mine Roadway Development Equipment Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 3. SANY Heavy Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 4. SANY Heavy Equipment Co., Ltd. Major Business

Table 5. SANY Heavy Equipment Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 6. SANY Heavy Equipment Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 7. SANY Heavy Equipment Co., Ltd. Recent Developments/Updates

Table 8. XCMG Construction Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 9. XCMG Construction Machinery Co., Ltd. Major Business

Table 10. XCMG Construction Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 11. XCMG Construction Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 12. XCMG Construction Machinery Co., Ltd. Recent Developments/Updates

Table 13. China Coal Technology & Engineering Group Corp. (CCTEG) Basic Information, Manufacturing Base and Competitors

Table 14. China Coal Technology & Engineering Group Corp. (CCTEG) Major Business

Table 15. China Coal Technology & Engineering Group Corp. (CCTEG) Coal Mine Roadway Development Equipment Product and Services

Table 16. China Coal Technology & Engineering Group Corp. (CCTEG) Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 17. China Coal Technology & Engineering Group Corp. (CCTEG) Recent Developments/Updates

Table 18. Shanghai Chuangli Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 19. Shanghai Chuangli Group Co., Ltd. Major Business

Table 20. Shanghai Chuangli Group Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 21. Shanghai Chuangli Group Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 22. Shanghai Chuangli Group Co., Ltd. Recent Developments/Updates

Table 23. Shijiazhuang Coal Mining Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 24. Shijiazhuang Coal Mining Machinery Co., Ltd. Major Business

Table 25. Shijiazhuang Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 26. Shijiazhuang Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 27. Shijiazhuang Coal Mining Machinery Co., Ltd. Recent Developments/Updates

Table 28. Taiyuan Heavy Industry Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 29. Taiyuan Heavy Industry Co., Ltd. Major Business

Table 30. Taiyuan Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 31. Taiyuan Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 32. Taiyuan Heavy Industry Co., Ltd. Recent Developments/Updates

Table 33. Jiangxi Siton Machinery Manufacturing Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 34. Jiangxi Siton Machinery Manufacturing Co., Ltd. Major Business

Table 35. Jiangxi Siton Machinery Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 36. Jiangxi Siton Machinery Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 37. Jiangxi Siton Machinery Manufacturing Co., Ltd. Recent Developments/Updates

Table 38. Kaisheng Heavy Industry Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 39. Kaisheng Heavy Industry Co., Ltd. Major Business

Table 40. Kaisheng Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 41. Kaisheng Heavy Industry Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 42. Kaisheng Heavy Industry Co., Ltd. Recent Developments/Updates

Table 43. Shanxi Meijia Mining Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 44. Shanxi Meijia Mining Equipment Co., Ltd. Major Business

Table 45. Shanxi Meijia Mining Equipment Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 46. Shanxi Meijia Mining Equipment Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 47. Shanxi Meijia Mining Equipment Co., Ltd. Recent Developments/Updates

Table 48. Jiamusi Coal Mining Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 49. Jiamusi Coal Mining Machinery Co., Ltd. Major Business

Table 50. Jiamusi Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 51. Jiamusi Coal Mining Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 52. Jiamusi Coal Mining Machinery Co., Ltd. Recent Developments/Updates

Table 53. Linzhou Heavy Machinery Group Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 54. Linzhou Heavy Machinery Group Co., Ltd. Major Business

Table 55. Linzhou Heavy Machinery Group Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 56. Linzhou Heavy Machinery Group Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 57. Linzhou Heavy Machinery Group Co., Ltd. Recent Developments/Updates

Table 58. Shanghai Kemei Electromechanical Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 59. Shanghai Kemei Electromechanical Co., Ltd. Major Business

Table 60. Shanghai Kemei Electromechanical Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 61. Shanghai Kemei Electromechanical Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 62. Shanghai Kemei Electromechanical Co., Ltd. Recent Developments/Updates
Table 63. China Railway Construction Heavy Industry Corporation Limited (CRCHI) Basic Information, Manufacturing Base and Competitors
Table 64. China Railway Construction Heavy Industry Corporation Limited (CRCHI) Major Business
Table 65. China Railway Construction Heavy Industry Corporation Limited (CRCHI) Coal Mine Roadway Development Equipment Product and Services
Table 66. China Railway Construction Heavy Industry Corporation Limited (CRCHI) Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 67. China Railway Construction Heavy Industry Corporation Limited (CRCHI) Recent Developments/Updates
Table 68. Hebei Jinglong Intelligent Equipment Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 69. Hebei Jinglong Intelligent Equipment Co., Ltd. Major Business
Table 70. Hebei Jinglong Intelligent Equipment Co., Ltd. Coal Mine Roadway Development Equipment Product and Services
Table 71. Hebei Jinglong Intelligent Equipment Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 72. Hebei Jinglong Intelligent Equipment Co., Ltd. Recent Developments/Updates
Table 73. China Railway Engineering Equipment Group Co., Ltd. (CREG) Basic Information, Manufacturing Base and Competitors
Table 74. China Railway Engineering Equipment Group Co., Ltd. (CREG) Major Business
Table 75. China Railway Engineering Equipment Group Co., Ltd. (CREG) Coal Mine Roadway Development Equipment Product and Services
Table 76. China Railway Engineering Equipment Group Co., Ltd. (CREG) Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 77. China Railway Engineering Equipment Group Co., Ltd. (CREG) Recent Developments/Updates
Table 78. Northern Heavy Industries Group Co., Ltd. (NHI) Basic Information, Manufacturing Base and Competitors
Table 79. Northern Heavy Industries Group Co., Ltd. (NHI) Major Business
Table 80. Northern Heavy Industries Group Co., Ltd. (NHI) Coal Mine Roadway Development Equipment Product and Services
Table 81. Northern Heavy Industries Group Co., Ltd. (NHI) Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue

(USD Million), Gross Margin and Market Share (2021-2026)

Table 82. Northern Heavy Industries Group Co., Ltd. (NHI) Recent Developments/Updates

Table 83. Jiangsu Shendun Engineering Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 84. Jiangsu Shendun Engineering Machinery Co., Ltd. Major Business

Table 85. Jiangsu Shendun Engineering Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 86. Jiangsu Shendun Engineering Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 87. Jiangsu Shendun Engineering Machinery Co., Ltd. Recent Developments/Updates

Table 88. CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 89. CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Major Business

Table 90. CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 91. CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. CCCC Tianhe Mechanical Equipment Manufacturing Co., Ltd. Recent Developments/Updates

Table 93. Liaoning Censcience Industry Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 94. Liaoning Censcience Industry Co., Ltd. Major Business

Table 95. Liaoning Censcience Industry Co., Ltd. Coal Mine Roadway Development Equipment Product and Services

Table 96. Liaoning Censcience Industry Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Liaoning Censcience Industry Co., Ltd. Recent Developments/Updates

Table 98. Sandvik AB Basic Information, Manufacturing Base and Competitors

Table 99. Sandvik AB Major Business

Table 100. Sandvik AB Coal Mine Roadway Development Equipment Product and Services

Table 101. Sandvik AB Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Sandvik AB Recent Developments/Updates
Table 103. Komatsu Ltd. Basic Information, Manufacturing Base and Competitors
Table 104. Komatsu Ltd. Major Business
Table 105. Komatsu Ltd. Coal Mine Roadway Development Equipment Product and Services
Table 106. Komatsu Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 107. Komatsu Ltd. Recent Developments/Updates
Table 108. Grenevia S.A. (FAMUR) Basic Information, Manufacturing Base and Competitors
Table 109. Grenevia S.A. (FAMUR) Major Business
Table 110. Grenevia S.A. (FAMUR) Coal Mine Roadway Development Equipment Product and Services
Table 111. Grenevia S.A. (FAMUR) Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 112. Grenevia S.A. (FAMUR) Recent Developments/Updates
Table 113. Mitsui Miike Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors
Table 114. Mitsui Miike Machinery Co., Ltd. Major Business
Table 115. Mitsui Miike Machinery Co., Ltd. Coal Mine Roadway Development Equipment Product and Services
Table 116. Mitsui Miike Machinery Co., Ltd. Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 117. Mitsui Miike Machinery Co., Ltd. Recent Developments/Updates
Table 118. Corum Group Basic Information, Manufacturing Base and Competitors
Table 119. Corum Group Major Business
Table 120. Corum Group Coal Mine Roadway Development Equipment Product and Services
Table 121. Corum Group Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
Table 122. Corum Group Recent Developments/Updates
Table 123. JSC Kopeysk Machine-Building Plant Basic Information, Manufacturing Base and Competitors
Table 124. JSC Kopeysk Machine-Building Plant Major Business
Table 125. JSC Kopeysk Machine-Building Plant Coal Mine Roadway Development

Equipment Product and Services

Table 126. JSC Kopeysk Machine-Building Plant Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. JSC Kopeysk Machine-Building Plant Recent Developments/Updates

Table 128. NKMZ Group Basic Information, Manufacturing Base and Competitors

Table 129. NKMZ Group Major Business

Table 130. NKMZ Group Coal Mine Roadway Development Equipment Product and Services

Table 131. NKMZ Group Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. NKMZ Group Recent Developments/Updates

Table 133. MSB GmbH & Co. KG (IBS Mining and Tunnelling) Basic Information, Manufacturing Base and Competitors

Table 134. MSB GmbH & Co. KG (IBS Mining and Tunnelling) Major Business

Table 135. MSB GmbH & Co. KG (IBS Mining and Tunnelling) Coal Mine Roadway Development Equipment Product and Services

Table 136. MSB GmbH & Co. KG (IBS Mining and Tunnelling) Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 137. MSB GmbH & Co. KG (IBS Mining and Tunnelling) Recent Developments/Updates

Table 138. Antraquip Corporation Basic Information, Manufacturing Base and Competitors

Table 139. Antraquip Corporation Major Business

Table 140. Antraquip Corporation Coal Mine Roadway Development Equipment Product and Services

Table 141. Antraquip Corporation Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 142. Antraquip Corporation Recent Developments/Updates

Table 143. BBM Group Basic Information, Manufacturing Base and Competitors

Table 144. BBM Group Major Business

Table 145. BBM Group Coal Mine Roadway Development Equipment Product and Services

Table 146. BBM Group Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 147. BBM Group Recent Developments/Updates

Table 148. The Robbins Company Basic Information, Manufacturing Base and Competitors

Table 149. The Robbins Company Major Business

Table 150. The Robbins Company Coal Mine Roadway Development Equipment Product and Services

Table 151. The Robbins Company Coal Mine Roadway Development Equipment Sales Quantity (Units), Average Price (K US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. The Robbins Company Recent Developments/Updates

Table 153. Global Coal Mine Roadway Development Equipment Sales Quantity by Manufacturer (2021-2026) & (Units)

Table 154. Global Coal Mine Roadway Development Equipment Revenue by Manufacturer (2021-2026) & (USD Million)

Table 155. Global Coal Mine Roadway Development Equipment Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 156. Market Position of Manufacturers in Coal Mine Roadway Development Equipment, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 157. Head Office and Coal Mine Roadway Development Equipment Production Site of Key Manufacturer

Table 158. Coal Mine Roadway Development Equipment Market: Company Product Type Footprint

Table 159. Coal Mine Roadway Development Equipment Market: Company Product Application Footprint

Table 160. Coal Mine Roadway Development Equipment New Market Entrants and Barriers to Market Entry

Table 161. Coal Mine Roadway Development Equipment Mergers, Acquisition, Agreements, and Collaborations

Table 162. Global Coal Mine Roadway Development Equipment Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 163. Global Coal Mine Roadway Development Equipment Sales Quantity by Region (2021-2026) & (Units)

Table 164. Global Coal Mine Roadway Development Equipment Sales Quantity by Region (2027-2032) & (Units)

Table 165. Global Coal Mine Roadway Development Equipment Consumption Value by Region (2021-2026) & (USD Million)

Table 166. Global Coal Mine Roadway Development Equipment Consumption Value by Region (2027-2032) & (USD Million)

Table 167. Global Coal Mine Roadway Development Equipment Average Price by

Region (2021-2026) & (K US\$/Unit)

Table 168. Global Coal Mine Roadway Development Equipment Average Price by Region (2027-2032) & (K US\$/Unit)

Table 169. Global Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2026) & (Units)

Table 170. Global Coal Mine Roadway Development Equipment Sales Quantity by Type (2027-2032) & (Units)

Table 171. Global Coal Mine Roadway Development Equipment Consumption Value by Type (2021-2026) & (USD Million)

Table 172. Global Coal Mine Roadway Development Equipment Consumption Value by Type (2027-2032) & (USD Million)

Table 173. Global Coal Mine Roadway Development Equipment Average Price by Type (2021-2026) & (K US\$/Unit)

Table 174. Global Coal Mine Roadway Development Equipment Average Price by Type (2027-2032) & (K US\$/Unit)

Table 175. Global Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2026) & (Units)

Table 176. Global Coal Mine Roadway Development Equipment Sales Quantity by Application (2027-2032) & (Units)

Table 177. Global Coal Mine Roadway Development Equipment Consumption Value by Application (2021-2026) & (USD Million)

Table 178. Global Coal Mine Roadway Development Equipment Consumption Value by Application (2027-2032) & (USD Million)

Table 179. Global Coal Mine Roadway Development Equipment Average Price by Application (2021-2026) & (K US\$/Unit)

Table 180. Global Coal Mine Roadway Development Equipment Average Price by Application (2027-2032) & (K US\$/Unit)

Table 181. North America Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2026) & (Units)

Table 182. North America Coal Mine Roadway Development Equipment Sales Quantity by Type (2027-2032) & (Units)

Table 183. North America Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2026) & (Units)

Table 184. North America Coal Mine Roadway Development Equipment Sales Quantity by Application (2027-2032) & (Units)

Table 185. North America Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2026) & (Units)

Table 186. North America Coal Mine Roadway Development Equipment Sales Quantity by Country (2027-2032) & (Units)

Table 187. North America Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2026) & (USD Million)

Table 188. North America Coal Mine Roadway Development Equipment Consumption Value by Country (2027-2032) & (USD Million)

Table 189. Europe Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2026) & (Units)

Table 190. Europe Coal Mine Roadway Development Equipment Sales Quantity by Type (2027-2032) & (Units)

Table 191. Europe Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2026) & (Units)

Table 192. Europe Coal Mine Roadway Development Equipment Sales Quantity by Application (2027-2032) & (Units)

Table 193. Europe Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2026) & (Units)

Table 194. Europe Coal Mine Roadway Development Equipment Sales Quantity by Country (2027-2032) & (Units)

Table 195. Europe Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2026) & (USD Million)

Table 196. Europe Coal Mine Roadway Development Equipment Consumption Value by Country (2027-2032) & (USD Million)

Table 197. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2026) & (Units)

Table 198. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Type (2027-2032) & (Units)

Table 199. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2026) & (Units)

Table 200. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Application (2027-2032) & (Units)

Table 201. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Region (2021-2026) & (Units)

Table 202. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity by Region (2027-2032) & (Units)

Table 203. Asia-Pacific Coal Mine Roadway Development Equipment Consumption Value by Region (2021-2026) & (USD Million)

Table 204. Asia-Pacific Coal Mine Roadway Development Equipment Consumption Value by Region (2027-2032) & (USD Million)

Table 205. South America Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2026) & (Units)

Table 206. South America Coal Mine Roadway Development Equipment Sales Quantity

by Type (2027-2032) & (Units)

Table 207. South America Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2026) & (Units)

Table 208. South America Coal Mine Roadway Development Equipment Sales Quantity by Application (2027-2032) & (Units)

Table 209. South America Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2026) & (Units)

Table 210. South America Coal Mine Roadway Development Equipment Sales Quantity by Country (2027-2032) & (Units)

Table 211. South America Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2026) & (USD Million)

Table 212. South America Coal Mine Roadway Development Equipment Consumption Value by Country (2027-2032) & (USD Million)

Table 213. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Type (2021-2026) & (Units)

Table 214. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Type (2027-2032) & (Units)

Table 215. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Application (2021-2026) & (Units)

Table 216. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Application (2027-2032) & (Units)

Table 217. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Country (2021-2026) & (Units)

Table 218. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity by Country (2027-2032) & (Units)

Table 219. Middle East & Africa Coal Mine Roadway Development Equipment Consumption Value by Country (2021-2026) & (USD Million)

Table 220. Middle East & Africa Coal Mine Roadway Development Equipment Consumption Value by Country (2027-2032) & (USD Million)

Table 221. Coal Mine Roadway Development Equipment Raw Material

Table 222. Key Manufacturers of Coal Mine Roadway Development Equipment Raw Materials

Table 223. Coal Mine Roadway Development Equipment Typical Distributors

Table 224. Coal Mine Roadway Development Equipment Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Coal Mine Roadway Development Equipment Picture
- Figure 2. Global Coal Mine Roadway Development Equipment Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Coal Mine Roadway Development Equipment Revenue Market Share by Type in 2025
- Figure 4. Roadheaders Examples
- Figure 5. Bolter Miners Examples
- Figure 6. Mining TBMs Examples
- Figure 7. Global Coal Mine Roadway Development Equipment Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 8. Global Coal Mine Roadway Development Equipment Revenue Market Share by Application in 2025
- Figure 9. Coal-dominant Roadways Examples
- Figure 10. Mixed Coal-Rock Roadways Examples
- Figure 11. Rock-dominant Roadways Examples
- Figure 12. Global Coal Mine Roadway Development Equipment Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 13. Global Coal Mine Roadway Development Equipment Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 14. Global Coal Mine Roadway Development Equipment Sales Quantity (2021-2032) & (Units)
- Figure 15. Global Coal Mine Roadway Development Equipment Price (2021-2032) & (K US\$/Unit)
- Figure 16. Global Coal Mine Roadway Development Equipment Sales Quantity Market Share by Manufacturer in 2025
- Figure 17. Global Coal Mine Roadway Development Equipment Revenue Market Share by Manufacturer in 2025
- Figure 18. Producer Shipments of Coal Mine Roadway Development Equipment by Manufacturer Sales (\$MM) and Market Share (%): 2025
- Figure 19. Top 3 Coal Mine Roadway Development Equipment Manufacturer (Revenue) Market Share in 2025
- Figure 20. Top 6 Coal Mine Roadway Development Equipment Manufacturer (Revenue) Market Share in 2025
- Figure 21. Global Coal Mine Roadway Development Equipment Sales Quantity Market Share by Region (2021-2032)

Figure 22. Global Coal Mine Roadway Development Equipment Consumption Value Market Share by Region (2021-2032)

Figure 23. North America Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 24. Europe Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 25. Asia-Pacific Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 26. South America Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 27. Middle East & Africa Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 28. Global Coal Mine Roadway Development Equipment Sales Quantity Market Share by Type (2021-2032)

Figure 29. Global Coal Mine Roadway Development Equipment Consumption Value Market Share by Type (2021-2032)

Figure 30. Global Coal Mine Roadway Development Equipment Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 31. Global Coal Mine Roadway Development Equipment Sales Quantity Market Share by Application (2021-2032)

Figure 32. Global Coal Mine Roadway Development Equipment Revenue Market Share by Application (2021-2032)

Figure 33. Global Coal Mine Roadway Development Equipment Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 34. North America Coal Mine Roadway Development Equipment Sales Quantity Market Share by Type (2021-2032)

Figure 35. North America Coal Mine Roadway Development Equipment Sales Quantity Market Share by Application (2021-2032)

Figure 36. North America Coal Mine Roadway Development Equipment Sales Quantity Market Share by Country (2021-2032)

Figure 37. North America Coal Mine Roadway Development Equipment Consumption Value Market Share by Country (2021-2032)

Figure 38. United States Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 39. Canada Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 40. Mexico Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 41. Europe Coal Mine Roadway Development Equipment Sales Quantity Market

Share by Type (2021-2032)

Figure 42. Europe Coal Mine Roadway Development Equipment Sales Quantity Market Share by Application (2021-2032)

Figure 43. Europe Coal Mine Roadway Development Equipment Sales Quantity Market Share by Country (2021-2032)

Figure 44. Europe Coal Mine Roadway Development Equipment Consumption Value Market Share by Country (2021-2032)

Figure 45. Germany Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 46. France Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 47. United Kingdom Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 48. Russia Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 49. Italy Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 50. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity Market Share by Type (2021-2032)

Figure 51. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity Market Share by Application (2021-2032)

Figure 52. Asia-Pacific Coal Mine Roadway Development Equipment Sales Quantity Market Share by Region (2021-2032)

Figure 53. Asia-Pacific Coal Mine Roadway Development Equipment Consumption Value Market Share by Region (2021-2032)

Figure 54. China Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 55. Japan Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 56. South Korea Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 57. India Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 58. Southeast Asia Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 59. Australia Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 60. South America Coal Mine Roadway Development Equipment Sales Quantity Market Share by Type (2021-2032)

Figure 61. South America Coal Mine Roadway Development Equipment Sales Quantity Market Share by Application (2021-2032)

Figure 62. South America Coal Mine Roadway Development Equipment Sales Quantity Market Share by Country (2021-2032)

Figure 63. South America Coal Mine Roadway Development Equipment Consumption Value Market Share by Country (2021-2032)

Figure 64. Brazil Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 65. Argentina Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

Figure 66. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity Market Share by Type (2021-2032)

Figure 67. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity Market Share by Application (2021-2032)

Figure 68. Middle East & Africa Coal Mine Roadway Development Equipment Sales Quantity Market Share by Country (2021-2032)

Figure 69. Middle East & Africa Coal Mine Roadway Development Equipment Consumption Value Market Share by Country (2021-2032)

Figure 70. Turkey Coal Mine Roadway Development Equipment Consumption Value (2021-2032) & (USD Million)

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