

Global Cold Recycler Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Cold Recycler market size is expected to reach \$ 946 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Cold Recyclers are heavy construction machinery used for in-situ rehabilitation of asphalt pavements and stabilization of subgrade soils. Cold recyclers use milling and mixing rotors to pulverize existing asphalt layers into granular material, then accurately inject controlled quantities of binding agents and water, and mix all materials in a single-pass operation to produce a recycled base or stabilized layer. This technology enables cold in-place recycling, and soil stabilization, significantly reducing material consumption, lowering transportation requirements, and improving environmental performance compared with conventional reconstruction methods.

In 2025, global Cold Recyclers production reached approximately 1.7 k units, with an average global market price of around US\$ 420 k per unit

The upstream supply chain of Cold Recyclers mainly includes structural steel, high-strength wear-resistant steel, hydraulic systems, engines, etc. Key suppliers include ArcelorMittal, Nippon Steel, Baosteel, Cummins, and Deutz, etc.

Downstream customers of Cold Recyclers are primarily composed of road construction contractors, civil engineering companies, municipal infrastructure enterprises, highway maintenance authorities, airport construction contractors, and large-scale EPC contractors. Key global customers include ACS Group, Skanska, China Communications Construction Company (CCCC), etc. These customers deploy cold recycling equipment in large-scale infrastructure construction, road rehabilitation, and soil stabilization projects to improve construction efficiency and reduce material and

transportation costs.

The gross margin of Cold Recyclers varies significantly by product class and manufacturer positioning. Overall industry gross margins typically range from 20% to 40%.

Cold Recyclers are segmented into three mutually exclusive power classes, including Below 400 kW, 400-500 kW, and Above 500 kW. Below 400 kW equipment is mainly used for light-duty municipal maintenance, rural roads, and shallow-depth recycling applications, where flexibility and maneuverability are prioritized over productivity. The 400-500 kW segment represents the mainstream category in the global market, widely adopted in national highways, provincial roads, and urban infrastructure projects due to its balanced efficiency, cost-effectiveness, and operational flexibility. Above 500 kW machines are high-end heavy-duty equipment used for large-scale highway reconstruction, deep-layer stabilization, and airport runway rehabilitation, offering higher productivity, deeper working capability, and wider construction coverage.

Cold Recyclers are primarily applied in Road Construction, Public Engineering, and Other applications. Road Construction is the dominated application segment, covering highways, national and provincial roads, urban roads, and rural road construction, reconstruction, and maintenance projects. In road rehabilitation works, the equipment performs in-place crushing, milling, and mixing of existing asphalt layers and partial base layers, and then forms a recycled base or stabilized layer structure by adding cement, emulsified asphalt, foamed bitumen, and water. In new road construction, it is mainly used to improve subgrade bearing capacity and base layer uniformity, thereby enhancing construction efficiency and reducing overall project costs.

The market is driven by increasing global infrastructure investment, accelerated road rehabilitation demand, and the shift toward sustainable and recycling-based construction technologies. Rising environmental regulations and carbon reduction targets further support the adoption of cold recycling methods. The expansion of highway networks in emerging economies, combined with aging road infrastructure in developed regions, significantly contributes to market growth.

Despite strong growth potential, the market is constrained by high initial equipment acquisition costs and complex maintenance requirements. The need for skilled operators and advanced construction management capabilities limits adoption in some developing regions. Infrastructure investment cycles can lead to demand volatility, affecting equipment procurement patterns. In addition, performance limitations under

extreme climatic conditions and variability in recycled material quality may impact operational efficiency.

This report studies the global Cold Recycler production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Cold Recycler 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 Cold Recycler that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Cold Recycler total production and demand, 2021-2032, (Units)

Global Cold Recycler total production value, 2021-2032, (USD Million)

Global Cold Recycler production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Cold Recycler consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Cold Recycler domestic production, consumption, key domestic manufacturers and share

Global Cold Recycler production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Cold Recycler production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Cold Recycler production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Cold Recycler 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 WIRTGEN, Bomag, Caterpillar, Sakai Heavy Industries, Astec Industries (Roadtec), XCMG, Shantui, Xuzhou Rema heavy Machinery, Dagang Road Machinery, 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 Cold Recycler market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, 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 Cold Recycler Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Cold Recycler Market, Segmentation by Type:

Below 400 kW

400-500 kW

Above 500 kW

Global Cold Recycler Market, Segmentation by Working Width:

Below 2.1 m

2.1 m-2.4 m

Above 2.4 m

Global Cold Recycler Market, Segmentation by Usage:

In-place Cold Recycling

In-place Soil Stabilization

Global Cold Recycler Market, Segmentation by Application:

Road Construction

Public Engineering

Other

Companies Profiled:

WIRTGEN

Bomag

Caterpillar

Sakai Heavy Industries

Astec Industries (Roadtec)

XCMG

Shantui

Xuzhou Rema heavy Machinery

Dagang Road Machinery

Key Questions Answered:

1. How big is the global Cold Recycler market?
2. What is the demand of the global Cold Recycler market?
3. What is the year over year growth of the global Cold Recycler market?
4. What is the production and production value of the global Cold Recycler market?
5. Who are the key producers in the global Cold Recycler market?
6. What are the growth factors driving the market demand?

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