

Global Crawler Excavators Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Crawler Excavators market size is expected to reach \$ 69152 million by 2032, rising at a market growth of 4.2% CAGR during the forecast period (2026-2032).

In 2025, global Crawler Excavators sales reached approximately 682,760 Units with an average global market price of around 74,010 USD per Unit.

Crawler excavators are self-propelled earthmoving machines mounted on crawler-track undercarriages and equipped with a rotating upper structure, operator cab, power system, hydraulic system, boom, arm, bucket and multiple interchangeable attachments. Their core function is to use hydraulic power to perform excavation, loading, trenching, slope trimming, breaking, demolition, quarrying, mining overburden removal and material handling. Compared with wheeled excavators, crawler excavators provide lower ground pressure, stronger traction and better stability, making them suitable for soft ground, complex terrain and continuous heavy-duty operation. Compared with loaders, bulldozers and lifting equipment, their key value lies in the efficient combined cycle of digging, swinging and loading.

Crawler excavators are construction machinery products with high barriers in technology, capital, manufacturing capability and distribution channels. The gross margin of complete machines can generally be referenced at around 18%–32%, with compact, standardized and price-sensitive models at the lower end, while large, mining-grade, intelligent, high-reliability and premium export models tend to achieve higher margins. When spare parts, maintenance, financing, telematics and remanufacturing are included, leading OEMs can further enhance life-cycle profitability. The upstream value chain includes steel, castings and forgings, engines, hydraulic pumps and valves, travel motors, swing bearings, controllers, sensors, crawler undercarriages and cabs.

The midstream covers machine design, structural welding, hydraulic and electronic integration, assembly, testing, branding, sales channels and service networks. Downstream demand comes from building construction, roads and bridges, water projects, municipal utilities, mining, quarrying, ports, agriculture and forestry improvement, and equipment rental.

Market Development Opportunities & Main Driving Factors

The main market opportunities for crawler excavators come from global infrastructure investment, fleet renewal, urbanization in emerging markets, mining resource development and the rising mechanization rate of construction. China, India, Southeast Asia, the Middle East, Latin America and Africa remain in active investment cycles for roads, bridges, water projects, energy facilities, mines and municipal infrastructure, supporting demand for medium and large crawler excavators. In mature markets such as Europe, North America and Japan, demand is increasingly driven by emission upgrades, replacement of aging fleets, rental fleet renewal and wider adoption of intelligent construction systems. In 2025, excavator sales by major Chinese manufacturers recovered, with both domestic sales and exports improving, indicating that the industry is gradually recovering from the previous downcycle. For corporate executives, marketing leaders and investors, crawler excavators are no longer just traditional earthmoving machines; they are platform products connected to construction efficiency, mining output, overseas infrastructure investment and aftermarket returns.

Market Challenges, Risks & Restraints

The crawler excavator market is highly cyclical, with demand closely linked to property investment, infrastructure funding, mining capital expenditure, customer financing conditions and fleet replacement cycles. When project starts slow, cash collection pressure rises or financing costs increase, equipment purchases are often postponed, leading to inventory pressure, price discounts and squeezed channel margins. On the cost side, fluctuations in steel, engines, hydraulic components, electronic control systems and crawler undercarriages can directly affect machine profitability. Emission standards, tariffs, exchange rates and regional trade policies may also reshape global manufacturing and export costs. Leading OEMs can smooth the cycle through global production, product upgrades, digital services and aftermarket networks, but smaller brands face greater pressure in R&D investment, supply-chain stability, channel coverage, financing capability and used-equipment residual value management. Disclosures from Caterpillar and Volvo Construction Equipment also show that even global leaders remain exposed to changes in macro demand and manufacturing costs.

Downstream Demand Trends

Downstream customers are shifting from simply "buying equipment" to "buying productivity, reliability and lower life-cycle cost." Building and municipal users are paying more attention to fuel efficiency, operator comfort, low noise, reduced tail swing, confined-space performance and service response. Mining, quarrying and large earthmoving customers focus more on uptime, structural durability, bucket capacity, maintainability and remote monitoring. Rental companies care more about residual value, versatility, failure rates and spare-parts availability. In the future, crawler excavators will continue to upgrade toward intelligence, digitalization, lower emissions and electrification. Machine-control systems, remote diagnostics, fuel management, automatic grading, jobsite data collection, autonomous mining operation and electric compact excavators are expected to gain higher penetration. As Chinese OEMs strengthen overseas channels, service networks and localization capabilities, the global competitive landscape is likely to evolve from one dominated by European, American and Japanese brands toward a more diversified structure combining premium international brands, cost-effective Chinese brands and localized service capabilities.

Report Scope

This report studies the global Crawler Excavators production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Crawler Excavators total production and demand, 2021-2032, (Units)

Global Crawler Excavators total production value, 2021-2032, (USD Million)

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

Global Crawler Excavators consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Crawler Excavators domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Crawler Excavators 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 Caterpillar, Kubota, SANY, Komatsu, Hitachi, XCMG, Volvo, John Deere, SDLG, Liugong 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 Crawler Excavators market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (USD/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 Crawler Excavators Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Crawler Excavators Market, Segmentation by Type:

Mini Excavator (below 6t)

Small Excavator (6-15t)

Medium-Sized Excavator (15-30t)

Large-Sized Excavator (Above 30t)

Global Crawler Excavators Market, Segmentation by Transmission Type:

Hydraulic Excavator

Mechanical Excavator

Global Crawler Excavators Market, Segmentation by Power Source:

Internal Combustion Engine

Electric Drive

Global Crawler Excavators Market, Segmentation by Application:

Building/Real Estate

Public Utilities

Mining & Oil Well

Others

Companies Profiled:

Caterpillar

Kubota

SANY

Komatsu

Hitachi

XCMG

Volvo

John Deere

SDLG

Liugong Machinery

Kobelco

Hyundai

Takeuchi

Doosan

JCB

Yanmar

Lovol

Sunward

Sumitomo

Zoomlion

CASE

KATO Works

Shantui

Lonking

GuangxiYuchai Equipment Technology

Key Questions Answered:

1. How big is the global Crawler Excavators market?
2. What is the demand of the global Crawler Excavators market?
3. What is the year over year growth of the global Crawler Excavators market?
4. What is the production and production value of the global Crawler Excavators market?
5. Who are the key producers in the global Crawler Excavators market?

6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Crawler Excavators Introduction
- 1.2 World Crawler Excavators Supply & Forecast
 - 1.2.1 World Crawler Excavators Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Crawler Excavators Production (2021-2032)
 - 1.2.3 World Crawler Excavators Pricing Trends (2021-2032)
- 1.3 World Crawler Excavators Production by Region (Based on Production Site)
 - 1.3.1 World Crawler Excavators Production Value by Region (2021-2032)
 - 1.3.2 World Crawler Excavators Production by Region (2021-2032)
 - 1.3.3 World Crawler Excavators Average Price by Region (2021-2032)
 - 1.3.4 North America Crawler Excavators Production (2021-2032)
 - 1.3.5 Europe Crawler Excavators Production (2021-2032)
 - 1.3.6 China Crawler Excavators Production (2021-2032)
 - 1.3.7 Japan Crawler Excavators Production (2021-2032)
 - 1.3.8 Korea Crawler Excavators Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Crawler Excavators Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Crawler Excavators Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Crawler Excavators Demand (2021-2032)
- 2.2 World Crawler Excavators Consumption by Region
 - 2.2.1 World Crawler Excavators Consumption by Region (2021-2026)
 - 2.2.2 World Crawler Excavators Consumption Forecast by Region (2027-2032)
- 2.3 United States Crawler Excavators Consumption (2021-2032)
- 2.4 China Crawler Excavators Consumption (2021-2032)
- 2.5 Europe Crawler Excavators Consumption (2021-2032)
- 2.6 Japan Crawler Excavators Consumption (2021-2032)
- 2.7 South Korea Crawler Excavators Consumption (2021-2032)
- 2.8 ASEAN Crawler Excavators Consumption (2021-2032)
- 2.9 India Crawler Excavators Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Crawler Excavators Production Value by Manufacturer (2021-2026)
- 3.2 World Crawler Excavators Production by Manufacturer (2021-2026)
- 3.3 World Crawler Excavators Average Price by Manufacturer (2021-2026)
- 3.4 Crawler Excavators Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Crawler Excavators Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Crawler Excavators in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Crawler Excavators in 2025
- 3.6 Crawler Excavators Market: Overall Company Footprint Analysis
 - 3.6.1 Crawler Excavators Market: Region Footprint
 - 3.6.2 Crawler Excavators Market: Company Product Type Footprint
 - 3.6.3 Crawler Excavators Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Crawler Excavators Production Value Comparison
 - 4.1.1 United States VS China: Crawler Excavators Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Crawler Excavators Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Crawler Excavators Production Comparison
 - 4.2.1 United States VS China: Crawler Excavators Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Crawler Excavators Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Crawler Excavators Consumption Comparison
 - 4.3.1 United States VS China: Crawler Excavators Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Crawler Excavators Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Crawler Excavators Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Crawler Excavators Manufacturers, Headquarters and

Production Site (States, Country)

4.4.2 United States Based Manufacturers Crawler Excavators Production Value (2021-2026)

4.4.3 United States Based Manufacturers Crawler Excavators Production (2021-2026)

4.5 China Based Crawler Excavators Manufacturers and Market Share

4.5.1 China Based Crawler Excavators Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Crawler Excavators Production Value (2021-2026)

4.5.3 China Based Manufacturers Crawler Excavators Production (2021-2026)

4.6 Rest of World Based Crawler Excavators Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Crawler Excavators Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Crawler Excavators Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Crawler Excavators Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Crawler Excavators Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Mini Excavator (below 6t)

5.2.2 Small Excavator (6-15t)

5.2.3 Medium-Sized Excavator (15-30t)

5.2.4 Large-Sized Excavator (Above 30t)

5.3 Market Segment by Type

5.3.1 World Crawler Excavators Production by Type (2021-2032)

5.3.2 World Crawler Excavators Production Value by Type (2021-2032)

5.3.3 World Crawler Excavators Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY TRANSMISSION TYPE

6.1 World Crawler Excavators Market Size Overview by Transmission Type: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Transmission Type

6.2.1 Hydraulic Excavator

6.2.2 Mechanical Excavator

6.3 Market Segment by Transmission Type

6.3.1 World Crawler Excavators Production by Transmission Type (2021-2032)

6.3.2 World Crawler Excavators Production Value by Transmission Type (2021-2032)

6.3.3 World Crawler Excavators Average Price by Transmission Type (2021-2032)

7 MARKET ANALYSIS BY POWER SOURCE

7.1 World Crawler Excavators Market Size Overview by Power Source: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Power Source

7.2.1 Internal Combustion Engine

7.2.2 Electric Drive

7.3 Market Segment by Power Source

7.3.1 World Crawler Excavators Production by Power Source (2021-2032)

7.3.2 World Crawler Excavators Production Value by Power Source (2021-2032)

7.3.3 World Crawler Excavators Average Price by Power Source (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Crawler Excavators Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Building/Real Estate

8.2.2 Public Utilities

8.2.3 Mining & Oil Well

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Crawler Excavators Production by Application (2021-2032)

8.3.2 World Crawler Excavators Production Value by Application (2021-2032)

8.3.3 World Crawler Excavators Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Caterpillar

9.1.1 Caterpillar Details

9.1.2 Caterpillar Major Business

9.1.3 Caterpillar Crawler Excavators Product and Services

9.1.4 Caterpillar Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Caterpillar Recent Developments/Updates

9.1.6 Caterpillar Competitive Strengths & Weaknesses

9.2 Kubota

9.2.1 Kubota Details

9.2.2 Kubota Major Business

9.2.3 Kubota Crawler Excavators Product and Services

9.2.4 Kubota Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Kubota Recent Developments/Updates

9.2.6 Kubota Competitive Strengths & Weaknesses

9.3 SANY

9.3.1 SANY Details

9.3.2 SANY Major Business

9.3.3 SANY Crawler Excavators Product and Services

9.3.4 SANY Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 SANY Recent Developments/Updates

9.3.6 SANY Competitive Strengths & Weaknesses

9.4 Komatsu

9.4.1 Komatsu Details

9.4.2 Komatsu Major Business

9.4.3 Komatsu Crawler Excavators Product and Services

9.4.4 Komatsu Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Komatsu Recent Developments/Updates

9.4.6 Komatsu Competitive Strengths & Weaknesses

9.5 Hitachi

9.5.1 Hitachi Details

9.5.2 Hitachi Major Business

9.5.3 Hitachi Crawler Excavators Product and Services

9.5.4 Hitachi Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Hitachi Recent Developments/Updates

9.5.6 Hitachi Competitive Strengths & Weaknesses

9.6 XCMG

9.6.1 XCMG Details

9.6.2 XCMG Major Business

9.6.3 XCMG Crawler Excavators Product and Services

9.6.4 XCMG Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 XCMG Recent Developments/Updates

9.6.6 XCMG Competitive Strengths & Weaknesses

9.7 Volvo

9.7.1 Volvo Details

9.7.2 Volvo Major Business

9.7.3 Volvo Crawler Excavators Product and Services

9.7.4 Volvo Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Volvo Recent Developments/Updates

9.7.6 Volvo Competitive Strengths & Weaknesses

9.8 John Deere

9.8.1 John Deere Details

9.8.2 John Deere Major Business

9.8.3 John Deere Crawler Excavators Product and Services

9.8.4 John Deere Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 John Deere Recent Developments/Updates

9.8.6 John Deere Competitive Strengths & Weaknesses

9.9 SDLG

9.9.1 SDLG Details

9.9.2 SDLG Major Business

9.9.3 SDLG Crawler Excavators Product and Services

9.9.4 SDLG Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 SDLG Recent Developments/Updates

9.9.6 SDLG Competitive Strengths & Weaknesses

9.10 Liugong Machinery

9.10.1 Liugong Machinery Details

9.10.2 Liugong Machinery Major Business

9.10.3 Liugong Machinery Crawler Excavators Product and Services

9.10.4 Liugong Machinery Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Liugong Machinery Recent Developments/Updates

9.10.6 Liugong Machinery Competitive Strengths & Weaknesses

9.11 Kobelco

9.11.1 Kobelco Details

9.11.2 Kobelco Major Business

9.11.3 Kobelco Crawler Excavators Product and Services

9.11.4 Kobelco Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.11.5 Kobelco Recent Developments/Updates
- 9.11.6 Kobelco Competitive Strengths & Weaknesses
- 9.12 Hyundai
 - 9.12.1 Hyundai Details
 - 9.12.2 Hyundai Major Business
 - 9.12.3 Hyundai Crawler Excavators Product and Services
 - 9.12.4 Hyundai Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Hyundai Recent Developments/Updates
 - 9.12.6 Hyundai Competitive Strengths & Weaknesses
- 9.13 Takeuchi
 - 9.13.1 Takeuchi Details
 - 9.13.2 Takeuchi Major Business
 - 9.13.3 Takeuchi Crawler Excavators Product and Services
 - 9.13.4 Takeuchi Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Takeuchi Recent Developments/Updates
 - 9.13.6 Takeuchi Competitive Strengths & Weaknesses
- 9.14 Doosan
 - 9.14.1 Doosan Details
 - 9.14.2 Doosan Major Business
 - 9.14.3 Doosan Crawler Excavators Product and Services
 - 9.14.4 Doosan Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Doosan Recent Developments/Updates
 - 9.14.6 Doosan Competitive Strengths & Weaknesses
- 9.15 JCB
 - 9.15.1 JCB Details
 - 9.15.2 JCB Major Business
 - 9.15.3 JCB Crawler Excavators Product and Services
 - 9.15.4 JCB Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 JCB Recent Developments/Updates
 - 9.15.6 JCB Competitive Strengths & Weaknesses
- 9.16 Yanmar
 - 9.16.1 Yanmar Details
 - 9.16.2 Yanmar Major Business
 - 9.16.3 Yanmar Crawler Excavators Product and Services
 - 9.16.4 Yanmar Crawler Excavators Production, Price, Value, Gross Margin and Market

Share (2021-2026)

9.16.5 Yanmar Recent Developments/Updates

9.16.6 Yanmar Competitive Strengths & Weaknesses

9.17 Lovol

9.17.1 Lovol Details

9.17.2 Lovol Major Business

9.17.3 Lovol Crawler Excavators Product and Services

9.17.4 Lovol Crawler Excavators Production, Price, Value, Gross Margin and Market

Share (2021-2026)

9.17.5 Lovol Recent Developments/Updates

9.17.6 Lovol Competitive Strengths & Weaknesses

9.18 Sunward

9.18.1 Sunward Details

9.18.2 Sunward Major Business

9.18.3 Sunward Crawler Excavators Product and Services

9.18.4 Sunward Crawler Excavators Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.18.5 Sunward Recent Developments/Updates

9.18.6 Sunward Competitive Strengths & Weaknesses

9.19 Sumitomo

9.19.1 Sumitomo Details

9.19.2 Sumitomo Major Business

9.19.3 Sumitomo Crawler Excavators Product and Services

9.19.4 Sumitomo Crawler Excavators Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.19.5 Sumitomo Recent Developments/Updates

9.19.6 Sumitomo Competitive Strengths & Weaknesses

9.20 Zoomlion

9.20.1 Zoomlion Details

9.20.2 Zoomlion Major Business

9.20.3 Zoomlion Crawler Excavators Product and Services

9.20.4 Zoomlion Crawler Excavators Production, Price, Value, Gross Margin and

Market Share (2021-2026)

9.20.5 Zoomlion Recent Developments/Updates

9.20.6 Zoomlion Competitive Strengths & Weaknesses

9.21 CASE

9.21.1 CASE Details

9.21.2 CASE Major Business

9.21.3 CASE Crawler Excavators Product and Services

9.21.4 CASE Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.21.5 CASE Recent Developments/Updates

9.21.6 CASE Competitive Strengths & Weaknesses

9.22 KATO Works

9.22.1 KATO Works Details

9.22.2 KATO Works Major Business

9.22.3 KATO Works Crawler Excavators Product and Services

9.22.4 KATO Works Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.22.5 KATO Works Recent Developments/Updates

9.22.6 KATO Works Competitive Strengths & Weaknesses

9.23 Shantui

9.23.1 Shantui Details

9.23.2 Shantui Major Business

9.23.3 Shantui Crawler Excavators Product and Services

9.23.4 Shantui Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.23.5 Shantui Recent Developments/Updates

9.23.6 Shantui Competitive Strengths & Weaknesses

9.24 Lonking

9.24.1 Lonking Details

9.24.2 Lonking Major Business

9.24.3 Lonking Crawler Excavators Product and Services

9.24.4 Lonking Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.24.5 Lonking Recent Developments/Updates

9.24.6 Lonking Competitive Strengths & Weaknesses

9.25 GuangxiYuchai Equipment Technology

9.25.1 GuangxiYuchai Equipment Technology Details

9.25.2 GuangxiYuchai Equipment Technology Major Business

9.25.3 GuangxiYuchai Equipment Technology Crawler Excavators Product and Services

9.25.4 GuangxiYuchai Equipment Technology Crawler Excavators Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.25.5 GuangxiYuchai Equipment Technology Recent Developments/Updates

9.25.6 GuangxiYuchai Equipment Technology Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Crawler Excavators Industry Chain
- 10.2 Crawler Excavators Upstream Analysis
 - 10.2.1 Crawler Excavators Core Raw Materials
 - 10.2.2 Main Manufacturers of Crawler Excavators Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Crawler Excavators Production Mode
- 10.6 Crawler Excavators Procurement Model
- 10.7 Crawler Excavators Industry Sales Model and Sales Channels
 - 10.7.1 Crawler Excavators Sales Model
 - 10.7.2 Crawler Excavators Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Crawler Excavators Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Crawler Excavators Production Value by Region (2021-2026) & (USD Million)

Table 3. World Crawler Excavators Production Value by Region (2027-2032) & (USD Million)

Table 4. World Crawler Excavators Production Value Market Share by Region (2021-2026)

Table 5. World Crawler Excavators Production Value Market Share by Region (2027-2032)

Table 6. World Crawler Excavators Production by Region (2021-2026) & (Units)

Table 7. World Crawler Excavators Production by Region (2027-2032) & (Units)

Table 8. World Crawler Excavators Production Market Share by Region (2021-2026)

Table 9. World Crawler Excavators Production Market Share by Region (2027-2032)

Table 10. World Crawler Excavators Average Price by Region (2021-2026) & (USD/Unit)

Table 11. World Crawler Excavators Average Price by Region (2027-2032) & (USD/Unit)

Table 12. Crawler Excavators Major Market Trends

Table 13. World Crawler Excavators Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Crawler Excavators Consumption by Region (2021-2026) & (Units)

Table 15. World Crawler Excavators Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Crawler Excavators Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Crawler Excavators Producers in 2025

Table 18. World Crawler Excavators Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Crawler Excavators Producers in 2025

Table 20. World Crawler Excavators Average Price by Manufacturer (2021-2026) & (USD/Unit)

Table 21. Global Crawler Excavators Company Evaluation Quadrant

Table 22. World Crawler Excavators Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Crawler Excavators Production Site of Key Manufacturer

Table 24. Crawler Excavators Market: Company Product Type Footprint
Table 25. Crawler Excavators Market: Company Product Application Footprint
Table 26. Crawler Excavators Competitive Factors
Table 27. Crawler Excavators New Entrant and Capacity Expansion Plans
Table 28. Crawler Excavators Mergers & Acquisitions Activity
Table 29. United States VS China Crawler Excavators Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Crawler Excavators Production Comparison, (2021 & 2025 & 2032) & (Units)
Table 31. United States VS China Crawler Excavators Consumption Comparison, (2021 & 2025 & 2032) & (Units)
Table 32. United States Based Crawler Excavators Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Crawler Excavators Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Crawler Excavators Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Crawler Excavators Production (2021-2026) & (Units)
Table 36. United States Based Manufacturers Crawler Excavators Production Market Share (2021-2026)
Table 37. China Based Crawler Excavators Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Crawler Excavators Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Crawler Excavators Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Crawler Excavators Production, (2021-2026) & (Units)
Table 41. China Based Manufacturers Crawler Excavators Production Market Share (2021-2026)
Table 42. Rest of World Based Crawler Excavators Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Crawler Excavators Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Crawler Excavators Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Crawler Excavators Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Crawler Excavators Production Market Share (2021-2026)

Table 47. World Crawler Excavators Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Crawler Excavators Production by Type (2021-2026) & (Units)

Table 49. World Crawler Excavators Production by Type (2027-2032) & (Units)

Table 50. World Crawler Excavators Production Value by Type (2021-2026) & (USD Million)

Table 51. World Crawler Excavators Production Value by Type (2027-2032) & (USD Million)

Table 52. World Crawler Excavators Average Price by Type (2021-2026) & (USD/Unit)

Table 53. World Crawler Excavators Average Price by Type (2027-2032) & (USD/Unit)

Table 54. World Crawler Excavators Production Value by Transmission Type, (USD Million), 2021 & 2025 & 2032

Table 55. World Crawler Excavators Production by Transmission Type (2021-2026) & (Units)

Table 56. World Crawler Excavators Production by Transmission Type (2027-2032) & (Units)

Table 57. World Crawler Excavators Production Value by Transmission Type (2021-2026) & (USD Million)

Table 58. World Crawler Excavators Production Value by Transmission Type (2027-2032) & (USD Million)

Table 59. World Crawler Excavators Average Price by Transmission Type (2021-2026) & (USD/Unit)

Table 60. World Crawler Excavators Average Price by Transmission Type (2027-2032) & (USD/Unit)

Table 61. World Crawler Excavators Production Value by Power Source, (USD Million), 2021 & 2025 & 2032

Table 62. World Crawler Excavators Production by Power Source (2021-2026) & (Units)

Table 63. World Crawler Excavators Production by Power Source (2027-2032) & (Units)

Table 64. World Crawler Excavators Production Value by Power Source (2021-2026) & (USD Million)

Table 65. World Crawler Excavators Production Value by Power Source (2027-2032) & (USD Million)

Table 66. World Crawler Excavators Average Price by Power Source (2021-2026) & (USD/Unit)

Table 67. World Crawler Excavators Average Price by Power Source (2027-2032) & (USD/Unit)

Table 68. World Crawler Excavators Production Value by Application, (USD Million),

2021 & 2025 & 2032

Table 69. World Crawler Excavators Production by Application (2021-2026) & (Units)

Table 70. World Crawler Excavators Production by Application (2027-2032) & (Units)

Table 71. World Crawler Excavators Production Value by Application (2021-2026) & (USD Million)

Table 72. World Crawler Excavators Production Value by Application (2027-2032) & (USD Million)

Table 73. World Crawler Excavators Average Price by Application (2021-2026) & (USD/Unit)

Table 74. World Crawler Excavators Average Price by Application (2027-2032) & (USD/Unit)

Table 75. Caterpillar Basic Information, Manufacturing Base and Competitors

Table 76. Caterpillar Major Business

Table 77. Caterpillar Crawler Excavators Product and Services

Table 78. Caterpillar Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Caterpillar Recent Developments/Updates

Table 80. Caterpillar Competitive Strengths & Weaknesses

Table 81. Kubota Basic Information, Manufacturing Base and Competitors

Table 82. Kubota Major Business

Table 83. Kubota Crawler Excavators Product and Services

Table 84. Kubota Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Kubota Recent Developments/Updates

Table 86. Kubota Competitive Strengths & Weaknesses

Table 87. SANY Basic Information, Manufacturing Base and Competitors

Table 88. SANY Major Business

Table 89. SANY Crawler Excavators Product and Services

Table 90. SANY Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. SANY Recent Developments/Updates

Table 92. SANY Competitive Strengths & Weaknesses

Table 93. Komatsu Basic Information, Manufacturing Base and Competitors

Table 94. Komatsu Major Business

Table 95. Komatsu Crawler Excavators Product and Services

Table 96. Komatsu Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Komatsu Recent Developments/Updates

Table 98. Komatsu Competitive Strengths & Weaknesses

Table 99. Hitachi Basic Information, Manufacturing Base and Competitors
Table 100. Hitachi Major Business
Table 101. Hitachi Crawler Excavators Product and Services
Table 102. Hitachi Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Hitachi Recent Developments/Updates
Table 104. Hitachi Competitive Strengths & Weaknesses
Table 105. XCMG Basic Information, Manufacturing Base and Competitors
Table 106. XCMG Major Business
Table 107. XCMG Crawler Excavators Product and Services
Table 108. XCMG Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. XCMG Recent Developments/Updates
Table 110. XCMG Competitive Strengths & Weaknesses
Table 111. Volvo Basic Information, Manufacturing Base and Competitors
Table 112. Volvo Major Business
Table 113. Volvo Crawler Excavators Product and Services
Table 114. Volvo Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Volvo Recent Developments/Updates
Table 116. Volvo Competitive Strengths & Weaknesses
Table 117. John Deere Basic Information, Manufacturing Base and Competitors
Table 118. John Deere Major Business
Table 119. John Deere Crawler Excavators Product and Services
Table 120. John Deere Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. John Deere Recent Developments/Updates
Table 122. John Deere Competitive Strengths & Weaknesses
Table 123. SDLG Basic Information, Manufacturing Base and Competitors
Table 124. SDLG Major Business
Table 125. SDLG Crawler Excavators Product and Services
Table 126. SDLG Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. SDLG Recent Developments/Updates
Table 128. SDLG Competitive Strengths & Weaknesses
Table 129. Liugong Machinery Basic Information, Manufacturing Base and Competitors
Table 130. Liugong Machinery Major Business
Table 131. Liugong Machinery Crawler Excavators Product and Services
Table 132. Liugong Machinery Crawler Excavators Production (Units), Price (USD/Unit),

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

Table 133. Liugong Machinery Recent Developments/Updates

Table 134. Liugong Machinery Competitive Strengths & Weaknesses

Table 135. Kobelco Basic Information, Manufacturing Base and Competitors

Table 136. Kobelco Major Business

Table 137. Kobelco Crawler Excavators Product and Services

Table 138. Kobelco Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Kobelco Recent Developments/Updates

Table 140. Kobelco Competitive Strengths & Weaknesses

Table 141. Hyundai Basic Information, Manufacturing Base and Competitors

Table 142. Hyundai Major Business

Table 143. Hyundai Crawler Excavators Product and Services

Table 144. Hyundai Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Hyundai Recent Developments/Updates

Table 146. Hyundai Competitive Strengths & Weaknesses

Table 147. Takeuchi Basic Information, Manufacturing Base and Competitors

Table 148. Takeuchi Major Business

Table 149. Takeuchi Crawler Excavators Product and Services

Table 150. Takeuchi Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Takeuchi Recent Developments/Updates

Table 152. Takeuchi Competitive Strengths & Weaknesses

Table 153. Doosan Basic Information, Manufacturing Base and Competitors

Table 154. Doosan Major Business

Table 155. Doosan Crawler Excavators Product and Services

Table 156. Doosan Crawler Excavators Production (Units), Price (USD/Unit), Production
Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Doosan Recent Developments/Updates

Table 158. Doosan Competitive Strengths & Weaknesses

Table 159. JCB Basic Information, Manufacturing Base and Competitors

Table 160. JCB Major Business

Table 161. JCB Crawler Excavators Product and Services

Table 162. JCB Crawler Excavators Production (Units), Price (USD/Unit), Production
Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. JCB Recent Developments/Updates

Table 164. JCB Competitive Strengths & Weaknesses

Table 165. Yanmar Basic Information, Manufacturing Base and Competitors

Table 166. Yanmar Major Business

Table 167. Yanmar Crawler Excavators Product and Services

Table 168. Yanmar Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 169. Yanmar Recent Developments/Updates

Table 170. Yanmar Competitive Strengths & Weaknesses

Table 171. Lovol Basic Information, Manufacturing Base and Competitors

Table 172. Lovol Major Business

Table 173. Lovol Crawler Excavators Product and Services

Table 174. Lovol Crawler Excavators Production (Units), Price (USD/Unit), Production
Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 175. Lovol Recent Developments/Updates

Table 176. Lovol Competitive Strengths & Weaknesses

Table 177. Sunward Basic Information, Manufacturing Base and Competitors

Table 178. Sunward Major Business

Table 179. Sunward Crawler Excavators Product and Services

Table 180. Sunward Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 181. Sunward Recent Developments/Updates

Table 182. Sunward Competitive Strengths & Weaknesses

Table 183. Sumitomo Basic Information, Manufacturing Base and Competitors

Table 184. Sumitomo Major Business

Table 185. Sumitomo Crawler Excavators Product and Services

Table 186. Sumitomo Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. Sumitomo Recent Developments/Updates

Table 188. Sumitomo Competitive Strengths & Weaknesses

Table 189. Zoomlion Basic Information, Manufacturing Base and Competitors

Table 190. Zoomlion Major Business

Table 191. Zoomlion Crawler Excavators Product and Services

Table 192. Zoomlion Crawler Excavators Production (Units), Price (USD/Unit),
Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Zoomlion Recent Developments/Updates

Table 194. Zoomlion Competitive Strengths & Weaknesses

Table 195. CASE Basic Information, Manufacturing Base and Competitors

Table 196. CASE Major Business

Table 197. CASE Crawler Excavators Product and Services

Table 198. CASE Crawler Excavators Production (Units), Price (USD/Unit), Production
Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. CASE Recent Developments/Updates
Table 200. CASE Competitive Strengths & Weaknesses
Table 201. KATO Works Basic Information, Manufacturing Base and Competitors
Table 202. KATO Works Major Business
Table 203. KATO Works Crawler Excavators Product and Services
Table 204. KATO Works Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 205. KATO Works Recent Developments/Updates
Table 206. KATO Works Competitive Strengths & Weaknesses
Table 207. Shantui Basic Information, Manufacturing Base and Competitors
Table 208. Shantui Major Business
Table 209. Shantui Crawler Excavators Product and Services
Table 210. Shantui Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 211. Shantui Recent Developments/Updates
Table 212. Shantui Competitive Strengths & Weaknesses
Table 213. Lonking Basic Information, Manufacturing Base and Competitors
Table 214. Lonking Major Business
Table 215. Lonking Crawler Excavators Product and Services
Table 216. Lonking Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 217. Lonking Recent Developments/Updates
Table 218. Lonking Competitive Strengths & Weaknesses
Table 219. GuangxiYuchai Equipment Technology Basic Information, Manufacturing Base and Competitors
Table 220. GuangxiYuchai Equipment Technology Major Business
Table 221. GuangxiYuchai Equipment Technology Crawler Excavators Product and Services
Table 222. GuangxiYuchai Equipment Technology Crawler Excavators Production (Units), Price (USD/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 223. GuangxiYuchai Equipment Technology Recent Developments/Updates
Table 224. GuangxiYuchai Equipment Technology Competitive Strengths & Weaknesses
Table 225. Global Key Players of Crawler Excavators Upstream (Raw Materials)
Table 226. Global Crawler Excavators Typical Customers
Table 227. Crawler Excavators Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Crawler Excavators Picture

Figure 2. World Crawler Excavators Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Crawler Excavators Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Crawler Excavators Production (2021-2032) & (Units)

Figure 5. World Crawler Excavators Average Price (2021-2032) & (USD/Unit)

Figure 6. World Crawler Excavators Production Value Market Share by Region (2021-2032)

Figure 7. World Crawler Excavators Production Market Share by Region (2021-2032)

Figure 8. North America Crawler Excavators Production (2021-2032) & (Units)

Figure 9. Europe Crawler Excavators Production (2021-2032) & (Units)

Figure 10. China Crawler Excavators Production (2021-2032) & (Units)

Figure 11. Japan Crawler Excavators Production (2021-2032) & (Units)

Figure 12. Korea Crawler Excavators Production (2021-2032) & (Units)

Figure 13. Crawler Excavators Market Drivers

Figure 14. Factors Affecting Demand

Figure 15. World Crawler Excavators Consumption (2021-2032) & (Units)

Figure 16. World Crawler Excavators Consumption Market Share by Region (2021-2032)

Figure 17. United States Crawler Excavators Consumption (2021-2032) & (Units)

Figure 18. China Crawler Excavators Consumption (2021-2032) & (Units)

Figure 19. Europe Crawler Excavators Consumption (2021-2032) & (Units)

Figure 20. Japan Crawler Excavators Consumption (2021-2032) & (Units)

Figure 21. South Korea Crawler Excavators Consumption (2021-2032) & (Units)

Figure 22. ASEAN Crawler Excavators Consumption (2021-2032) & (Units)

Figure 23. India Crawler Excavators Consumption (2021-2032) & (Units)

Figure 24. Producer Shipments of Crawler Excavators by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 25. Global Four-firm Concentration Ratios (CR4) for Crawler Excavators Markets in 2025

Figure 26. Global Four-firm Concentration Ratios (CR8) for Crawler Excavators Markets in 2025

Figure 27. United States VS China: Crawler Excavators Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Crawler Excavators Production Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Crawler Excavators Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States Based Manufacturers Crawler Excavators Production Market Share 2025

Figure 31. China Based Manufacturers Crawler Excavators Production Market Share 2025

Figure 32. Rest of World Based Manufacturers Crawler Excavators Production Market Share 2025

Figure 33. World Crawler Excavators Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 34. World Crawler Excavators Production Value Market Share by Type in 2025

Figure 35. Mini Excavator (below 6t)

Figure 36. Small Excavator (6-15t)

Figure 37. Medium-Sized Excavator (15-30t)

Figure 38. Large-Sized Excavator (Above 30t)

Figure 39. World Crawler Excavators Production Market Share by Type (2021-2032)

Figure 40. World Crawler Excavators Production Value Market Share by Type (2021-2032)

Figure 41. World Crawler Excavators Average Price by Type (2021-2032) & (USD/Unit)

Figure 42. World Crawler Excavators Production Value by Transmission Type, (USD Million), 2021 & 2025 & 2032

Figure 43. World Crawler Excavators Production Value Market Share by Transmission Type in 2025

Figure 44. Hydraulic Excavator

Figure 45. Mechanical Excavator

Figure 46. World Crawler Excavators Production Market Share by Transmission Type (2021-2032)

Figure 47. World Crawler Excavators Production Value Market Share by Transmission Type (2021-2032)

Figure 48. World Crawler Excavators Average Price by Transmission Type (2021-2032) & (USD/Unit)

Figure 49. World Crawler Excavators Production Value by Power Source, (USD Million), 2021 & 2025 & 2032

Figure 50. World Crawler Excavators Production Value Market Share by Power Source in 2025

Figure 51. Internal Combustion Engine

Figure 52. Electric Drive

Figure 53. World Crawler Excavators Production Market Share by Power Source (2021-2032)

Figure 54. World Crawler Excavators Production Value Market Share by Power Source (2021-2032)

Figure 55. World Crawler Excavators Average Price by Power Source (2021-2032) & (USD/Unit)

Figure 56. World Crawler Excavators Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Crawler Excavators Production Value Market Share by Application in 2025

Figure 58. Building/Real Estate

Figure 59. Public Utilities

Figure 60. Mining & Oil Well

Figure 61. Others

Figure 62. World Crawler Excavators Production Market Share by Application (2021-2032)

Figure 63. World Crawler Excavators Production Value Market Share by Application (2021-2032)

Figure 64. World Crawler Excavators Average Price by Application (2021-2032) & (USD/Unit)

Figure 65. Crawler Excavators Industry Chain

Figure 66. Crawler Excavators Procurement Model

Figure 67. Crawler Excavators Sales Model

Figure 68. Crawler Excavators Sales Channels, Direct Sales, and Distribution

Figure 69. Methodology

Figure 70. Research Process and Data Source

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