

Global Hydro Excavator Truck Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Hydro Excavator Truck market size is expected to reach \$ 1856 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

In 2025, global Hydro Excavator Truck production reached approximately 2,623 Units. The average price is approximately \$450,000. A hydro excavation truck, commonly referred to as a hydrovac truck, is a specialized non-destructive excavation vehicle built on a truck chassis, trailer platform, or modular mounting system. It integrates a high-pressure water system, a vacuum blower or positive displacement vacuum system, debris tank, water tank, boom, hose reel, hydraulic controls, heating package, filtration and safety systems into a mobile excavation unit. The equipment uses pressurized water to cut, loosen and slurry soil, clay, sand, gravel or frozen ground, while a high-flow vacuum system removes the slurry and transfers it into an onboard debris tank. Its primary use cases include utility daylighting, potholing, slot trenching, underground pipeline exposure, directional drilling support, municipal maintenance, oil and gas field work, construction site preparation and industrial cleanup.

Based on our research, the hydro excavation truck market should be viewed as a specialized equipment niche at the intersection of underground utility protection, non-destructive digging, municipal maintenance and industrial vacuum technology, rather than as a conventional construction machinery category. The equipment's core value proposition is not to replace all forms of mechanical excavation, but to reduce utility strikes, limit ground disturbance and improve worksite safety in environments where underground infrastructure is dense, access is constrained or damage costs are high. In North America, hydrovac equipment has already moved from oilfield and municipal maintenance applications into mainstream utility daylighting, telecom, power, pipeline and directional drilling support. In Europe and Asia, the same functional need is often

served by adjacent equipment categories such as suction excavators, sewer cleaning trucks, vacuum trucks and combination jetting units, which explains why the broad longlist is materially larger than the narrow core OEM list.

From a supply perspective, the market is led by North American and Canadian OEMs with dedicated hydrovac product families, large dealer networks and installed fleet references. Federal Signal's TRUVAC/Vactor platform, Alamo Group's Vacall, Super Products and Ring-O-Matic portfolio, and Toro's Ditch Witch and Tornado assets form the strongest group-level platforms. Vac-Con, Hi-Vac, GapVax, Foremost, Westech, Supervac, KAISER and Vermeer/VXP represent a specialized second tier with strong product know-how in vacuum systems, tank design, cold-weather operation, oilfield-oriented specifications, custom builds and fleet support. Australia has a disproportionately active regional manufacturing base through Vacvator, STG Global and Vorstrom, driven by non-destructive digging practices and service-locating demand. China, Japan, India and the Middle East have relevant municipal vacuum and sewer cleaning vehicle suppliers, but publicly verifiable, dedicated hydrovac truck OEM evidence remains more limited.

Demand growth is driven by utility safety rules, underground asset congestion, aging municipal infrastructure, oil and gas maintenance, horizontal directional drilling support, urban renewal and contractor preference for safer excavation methods. The buyer base includes hydrovac service contractors, municipalities, utilities, pipeline operators, civil construction firms, rental fleets and large industrial facilities. Future growth will come from fleet replacement, heavier adoption in utility locating, broader use of compact and non-CDL configurations, improved cold-weather packages, telematics-enabled fleet management and higher acceptance of non-destructive digging methods in regions that historically relied on mechanical excavation. At the same time, the sector faces real adoption constraints, including high upfront cost, vehicle weight and payload limits, water consumption, slurry disposal regulations, operator training requirements and chassis supply volatility.

Industry structure is gradually moving toward consolidation and platform ownership. Toro's acquisition of Tornado and Alamo's acquisition of Ring-O-Matic show that larger equipment groups are using M&A to deepen their hydrovac and vacuum excavation portfolios. This trend should raise the importance of dealer coverage, aftermarket support, financing, chassis allocation and multi-brand product segmentation. Product competition is likely to shift from basic capacity claims toward total jobsite productivity, regulatory compliance, payload optimization, ease of maintenance, operator ergonomics, safety controls and lifecycle cost. North America will remain the benchmark

market for product design and pricing, while Australia will remain a strong regional NDD market. In China and broader Asia, growth depends less on manufacturing capability and more on whether utility protection standards, urban renewal programs and non-destructive excavation practices become more widely enforced.

This report studies the global Hydro Excavator Truck production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Hydro Excavator Truck total production and demand, 2021-2032, (Units)

Global Hydro Excavator Truck total production value, 2021-2032, (USD Million)

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

Global Hydro Excavator Truck consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Hydro Excavator Truck domestic production, consumption, key domestic manufacturers and share

Global Hydro Excavator Truck production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Hydro Excavator Truck production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Hydro Excavator Truck production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Hydro Excavator Truck 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 Federal Signal, Alamo Group, Toro, Vac-Con, Hi-Vac, Vermeer, Foremost, GapVax, KAISER Premier, Westech Vac Systems, 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 Hydro Excavator Truck market

Detailed Segmentation:

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Hydro Excavator Truck Market, Segmentation by Type:

Truck-Mounted

Trailer-Mounted

Global Hydro Excavator Truck Market, Segmentation by Power System:

Diesel-powered

Hybrid

Pure Electric

Global Hydro Excavator Truck Market, Segmentation by Tank Capacity:

Tank Volume

Tank Volume 5,000–10,000 L

Tank Volume > 10,000 L

Global Hydro Excavator Truck Market, Segmentation by Application:

Municipal Engineering and Public Utilities

Telecommunications and Fiber Optic Infrastructure

Energy Sector

Others

Companies Profiled:

Federal Signal

Alamo Group

Toro

Vac-Con

Hi-Vac

Vermeer

Foremost

GapVax

KAISER Premier

Westech Vac Systems

Supervac

Vacvator

STG Global

Vorstrom

SECO Truck

Shandong Roadway Construction Machinery Manufacturing

Bucher Municipal

Cappellotto

KOKS Group

KARBA Otomotiv

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Hydro Excavator Truck Production Value by Manufacturer (2021-2026)
- 3.2 World Hydro Excavator Truck Production by Manufacturer (2021-2026)
- 3.3 World Hydro Excavator Truck Average Price by Manufacturer (2021-2026)
- 3.4 Hydro Excavator Truck Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Hydro Excavator Truck Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Hydro Excavator Truck in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Hydro Excavator Truck in 2025
- 3.6 Hydro Excavator Truck Market: Overall Company Footprint Analysis
 - 3.6.1 Hydro Excavator Truck Market: Region Footprint
 - 3.6.2 Hydro Excavator Truck Market: Company Product Type Footprint
 - 3.6.3 Hydro Excavator Truck 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: Hydro Excavator Truck Production Value Comparison
 - 4.1.1 United States VS China: Hydro Excavator Truck Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Hydro Excavator Truck Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Hydro Excavator Truck Production Comparison
 - 4.2.1 United States VS China: Hydro Excavator Truck Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Hydro Excavator Truck Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Hydro Excavator Truck Consumption Comparison
 - 4.3.1 United States VS China: Hydro Excavator Truck Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Hydro Excavator Truck Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Hydro Excavator Truck Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Hydro Excavator Truck Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Hydro Excavator Truck Production Value (2021-2026)

4.4.3 United States Based Manufacturers Hydro Excavator Truck Production (2021-2026)

4.5 China Based Hydro Excavator Truck Manufacturers and Market Share

4.5.1 China Based Hydro Excavator Truck Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Hydro Excavator Truck Production Value (2021-2026)

4.5.3 China Based Manufacturers Hydro Excavator Truck Production (2021-2026)

4.6 Rest of World Based Hydro Excavator Truck Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Hydro Excavator Truck Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Hydro Excavator Truck Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Hydro Excavator Truck Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Hydro Excavator Truck Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Truck-Mounted

5.2.2 Trailer-Mounted

5.3 Market Segment by Type

5.3.1 World Hydro Excavator Truck Production by Type (2021-2032)

5.3.2 World Hydro Excavator Truck Production Value by Type (2021-2032)

5.3.3 World Hydro Excavator Truck Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY POWER SYSTEM

6.1 World Hydro Excavator Truck Market Size Overview by Power System: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Power System

6.2.1 Diesel-powered

6.2.2 Hybrid

6.2.3 Pure Electric

6.3 Market Segment by Power System

6.3.1 World Hydro Excavator Truck Production by Power System (2021-2032)

6.3.2 World Hydro Excavator Truck Production Value by Power System (2021-2032)

6.3.3 World Hydro Excavator Truck Average Price by Power System (2021-2032)

7 MARKET ANALYSIS BY TANK CAPACITY

7.1 World Hydro Excavator Truck Market Size Overview by Tank Capacity: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Tank Capacity

7.2.1 Tank Volume 7.2.2 Tank Volume 5,000–10,000 L

7.2.3 Tank Volume > 10,000 L

7.3 Market Segment by Tank Capacity

7.3.1 World Hydro Excavator Truck Production by Tank Capacity (2021-2032)

7.3.2 World Hydro Excavator Truck Production Value by Tank Capacity (2021-2032)

7.3.3 World Hydro Excavator Truck Average Price by Tank Capacity (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Hydro Excavator Truck Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Municipal Engineering and Public Utilities

8.2.2 Telecommunications and Fiber Optic Infrastructure

8.2.3 Energy Sector

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Hydro Excavator Truck Production by Application (2021-2032)

8.3.2 World Hydro Excavator Truck Production Value by Application (2021-2032)

8.3.3 World Hydro Excavator Truck Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Federal Signal

9.1.1 Federal Signal Details

9.1.2 Federal Signal Major Business

9.1.3 Federal Signal Hydro Excavator Truck Product and Services

9.1.4 Federal Signal Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Federal Signal Recent Developments/Updates

9.1.6 Federal Signal Competitive Strengths & Weaknesses

9.2 Alamo Group

9.2.1 Alamo Group Details

9.2.2 Alamo Group Major Business

9.2.3 Alamo Group Hydro Excavator Truck Product and Services

9.2.4 Alamo Group Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Alamo Group Recent Developments/Updates

9.2.6 Alamo Group Competitive Strengths & Weaknesses

9.3 Toro

9.3.1 Toro Details

9.3.2 Toro Major Business

9.3.3 Toro Hydro Excavator Truck Product and Services

9.3.4 Toro Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Toro Recent Developments/Updates

9.3.6 Toro Competitive Strengths & Weaknesses

9.4 Vac-Con

9.4.1 Vac-Con Details

9.4.2 Vac-Con Major Business

9.4.3 Vac-Con Hydro Excavator Truck Product and Services

9.4.4 Vac-Con Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Vac-Con Recent Developments/Updates

9.4.6 Vac-Con Competitive Strengths & Weaknesses

9.5 Hi-Vac

9.5.1 Hi-Vac Details

9.5.2 Hi-Vac Major Business

9.5.3 Hi-Vac Hydro Excavator Truck Product and Services

9.5.4 Hi-Vac Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Hi-Vac Recent Developments/Updates

9.5.6 Hi-Vac Competitive Strengths & Weaknesses

9.6 Vermeer

9.6.1 Vermeer Details

9.6.2 Vermeer Major Business

- 9.6.3 Vermeer Hydro Excavator Truck Product and Services
- 9.6.4 Vermeer Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.6.5 Vermeer Recent Developments/Updates
- 9.6.6 Vermeer Competitive Strengths & Weaknesses
- 9.7 Foremost
 - 9.7.1 Foremost Details
 - 9.7.2 Foremost Major Business
 - 9.7.3 Foremost Hydro Excavator Truck Product and Services
 - 9.7.4 Foremost Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 Foremost Recent Developments/Updates
 - 9.7.6 Foremost Competitive Strengths & Weaknesses
- 9.8 GapVax
 - 9.8.1 GapVax Details
 - 9.8.2 GapVax Major Business
 - 9.8.3 GapVax Hydro Excavator Truck Product and Services
 - 9.8.4 GapVax Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 GapVax Recent Developments/Updates
 - 9.8.6 GapVax Competitive Strengths & Weaknesses
- 9.9 KAISER Premier
 - 9.9.1 KAISER Premier Details
 - 9.9.2 KAISER Premier Major Business
 - 9.9.3 KAISER Premier Hydro Excavator Truck Product and Services
 - 9.9.4 KAISER Premier Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 KAISER Premier Recent Developments/Updates
 - 9.9.6 KAISER Premier Competitive Strengths & Weaknesses
- 9.10 Westech Vac Systems
 - 9.10.1 Westech Vac Systems Details
 - 9.10.2 Westech Vac Systems Major Business
 - 9.10.3 Westech Vac Systems Hydro Excavator Truck Product and Services
 - 9.10.4 Westech Vac Systems Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Westech Vac Systems Recent Developments/Updates
 - 9.10.6 Westech Vac Systems Competitive Strengths & Weaknesses
- 9.11 Supervac
 - 9.11.1 Supervac Details

- 9.11.2 Supervac Major Business
- 9.11.3 Supervac Hydro Excavator Truck Product and Services
- 9.11.4 Supervac Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.11.5 Supervac Recent Developments/Updates
- 9.11.6 Supervac Competitive Strengths & Weaknesses
- 9.12 Vacvator
 - 9.12.1 Vacvator Details
 - 9.12.2 Vacvator Major Business
 - 9.12.3 Vacvator Hydro Excavator Truck Product and Services
 - 9.12.4 Vacvator Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.12.5 Vacvator Recent Developments/Updates
 - 9.12.6 Vacvator Competitive Strengths & Weaknesses
- 9.13 STG Global
 - 9.13.1 STG Global Details
 - 9.13.2 STG Global Major Business
 - 9.13.3 STG Global Hydro Excavator Truck Product and Services
 - 9.13.4 STG Global Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 STG Global Recent Developments/Updates
 - 9.13.6 STG Global Competitive Strengths & Weaknesses
- 9.14 Vorstrom
 - 9.14.1 Vorstrom Details
 - 9.14.2 Vorstrom Major Business
 - 9.14.3 Vorstrom Hydro Excavator Truck Product and Services
 - 9.14.4 Vorstrom Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 Vorstrom Recent Developments/Updates
 - 9.14.6 Vorstrom Competitive Strengths & Weaknesses
- 9.15 SECO Truck
 - 9.15.1 SECO Truck Details
 - 9.15.2 SECO Truck Major Business
 - 9.15.3 SECO Truck Hydro Excavator Truck Product and Services
 - 9.15.4 SECO Truck Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 SECO Truck Recent Developments/Updates
 - 9.15.6 SECO Truck Competitive Strengths & Weaknesses
- 9.16 Shandong Roadway Construction Machinery Manufacturing

- 9.16.1 Shandong Roadway Construction Machinery Manufacturing Details
- 9.16.2 Shandong Roadway Construction Machinery Manufacturing Major Business
- 9.16.3 Shandong Roadway Construction Machinery Manufacturing Hydro Excavator Truck Product and Services
- 9.16.4 Shandong Roadway Construction Machinery Manufacturing Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.16.5 Shandong Roadway Construction Machinery Manufacturing Recent Developments/Updates
- 9.16.6 Shandong Roadway Construction Machinery Manufacturing Competitive Strengths & Weaknesses
- 9.17 Bucher Municipal
 - 9.17.1 Bucher Municipal Details
 - 9.17.2 Bucher Municipal Major Business
 - 9.17.3 Bucher Municipal Hydro Excavator Truck Product and Services
 - 9.17.4 Bucher Municipal Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.17.5 Bucher Municipal Recent Developments/Updates
 - 9.17.6 Bucher Municipal Competitive Strengths & Weaknesses
- 9.18 Cappellotto
 - 9.18.1 Cappellotto Details
 - 9.18.2 Cappellotto Major Business
 - 9.18.3 Cappellotto Hydro Excavator Truck Product and Services
 - 9.18.4 Cappellotto Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.18.5 Cappellotto Recent Developments/Updates
 - 9.18.6 Cappellotto Competitive Strengths & Weaknesses
- 9.19 KOKS Group
 - 9.19.1 KOKS Group Details
 - 9.19.2 KOKS Group Major Business
 - 9.19.3 KOKS Group Hydro Excavator Truck Product and Services
 - 9.19.4 KOKS Group Hydro Excavator Truck Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.19.5 KOKS Group Recent Developments/Updates
 - 9.19.6 KOKS Group Competitive Strengths & Weaknesses
- 9.20 KARBA Otomotiv
 - 9.20.1 KARBA Otomotiv Details
 - 9.20.2 KARBA Otomotiv Major Business
 - 9.20.3 KARBA Otomotiv Hydro Excavator Truck Product and Services
 - 9.20.4 KARBA Otomotiv Hydro Excavator Truck Production, Price, Value, Gross

Margin and Market Share (2021-2026)

9.20.5 KARBA Otomotiv Recent Developments/Updates

9.20.6 KARBA Otomotiv Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Hydro Excavator Truck Industry Chain

10.2 Hydro Excavator Truck Upstream Analysis

10.2.1 Hydro Excavator Truck Core Raw Materials

10.2.2 Main Manufacturers of Hydro Excavator Truck Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Hydro Excavator Truck Production Mode

10.6 Hydro Excavator Truck Procurement Model

10.7 Hydro Excavator Truck Industry Sales Model and Sales Channels

10.7.1 Hydro Excavator Truck Sales Model

10.7.2 Hydro Excavator Truck 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 Hydro Excavator Truck Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Hydro Excavator Truck Production Value by Region (2021-2026) & (USD Million)

Table 3. World Hydro Excavator Truck Production Value by Region (2027-2032) & (USD Million)

Table 4. World Hydro Excavator Truck Production Value Market Share by Region (2021-2026)

Table 5. World Hydro Excavator Truck Production Value Market Share by Region (2027-2032)

Table 6. World Hydro Excavator Truck Production by Region (2021-2026) & (Units)

Table 7. World Hydro Excavator Truck Production by Region (2027-2032) & (Units)

Table 8. World Hydro Excavator Truck Production Market Share by Region (2021-2026)

Table 9. World Hydro Excavator Truck Production Market Share by Region (2027-2032)

Table 10. World Hydro Excavator Truck Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World Hydro Excavator Truck Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. Hydro Excavator Truck Major Market Trends

Table 13. World Hydro Excavator Truck Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Hydro Excavator Truck Consumption by Region (2021-2026) & (Units)

Table 15. World Hydro Excavator Truck Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Hydro Excavator Truck Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Hydro Excavator Truck Producers in 2025

Table 18. World Hydro Excavator Truck Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Hydro Excavator Truck Producers in 2025

Table 20. World Hydro Excavator Truck Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global Hydro Excavator Truck Company Evaluation Quadrant

Table 22. World Hydro Excavator Truck Industry Rank of Major Manufacturers, Based

on Production Value in 2025

Table 23. Head Office and Hydro Excavator Truck Production Site of Key Manufacturer

Table 24. Hydro Excavator Truck Market: Company Product Type Footprint

Table 25. Hydro Excavator Truck Market: Company Product Application Footprint

Table 26. Hydro Excavator Truck Competitive Factors

Table 27. Hydro Excavator Truck New Entrant and Capacity Expansion Plans

Table 28. Hydro Excavator Truck Mergers & Acquisitions Activity

Table 29. United States VS China Hydro Excavator Truck Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Hydro Excavator Truck Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Hydro Excavator Truck Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Hydro Excavator Truck Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Hydro Excavator Truck Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Hydro Excavator Truck Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Hydro Excavator Truck Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Hydro Excavator Truck Production Market Share (2021-2026)

Table 37. China Based Hydro Excavator Truck Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Hydro Excavator Truck Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Hydro Excavator Truck Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Hydro Excavator Truck Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Hydro Excavator Truck Production Market Share (2021-2026)

Table 42. Rest of World Based Hydro Excavator Truck Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Hydro Excavator Truck Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Hydro Excavator Truck Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Hydro Excavator Truck Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Hydro Excavator Truck Production Market Share (2021-2026)

Table 47. World Hydro Excavator Truck Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Hydro Excavator Truck Production by Type (2021-2026) & (Units)

Table 49. World Hydro Excavator Truck Production by Type (2027-2032) & (Units)

Table 50. World Hydro Excavator Truck Production Value by Type (2021-2026) & (USD Million)

Table 51. World Hydro Excavator Truck Production Value by Type (2027-2032) & (USD Million)

Table 52. World Hydro Excavator Truck Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World Hydro Excavator Truck Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World Hydro Excavator Truck Production Value by Power System, (USD Million), 2021 & 2025 & 2032

Table 55. World Hydro Excavator Truck Production by Power System (2021-2026) & (Units)

Table 56. World Hydro Excavator Truck Production by Power System (2027-2032) & (Units)

Table 57. World Hydro Excavator Truck Production Value by Power System (2021-2026) & (USD Million)

Table 58. World Hydro Excavator Truck Production Value by Power System (2027-2032) & (USD Million)

Table 59. World Hydro Excavator Truck Average Price by Power System (2021-2026) & (US\$/Unit)

Table 60. World Hydro Excavator Truck Average Price by Power System (2027-2032) & (US\$/Unit)

Table 61. World Hydro Excavator Truck Production Value by Tank Capacity, (USD Million), 2021 & 2025 & 2032

Table 62. World Hydro Excavator Truck Production by Tank Capacity (2021-2026) & (Units)

Table 63. World Hydro Excavator Truck Production by Tank Capacity (2027-2032) & (Units)

Table 64. World Hydro Excavator Truck Production Value by Tank Capacity (2021-2026) & (USD Million)

Table 65. World Hydro Excavator Truck Production Value by Tank Capacity

(2027-2032) & (USD Million)

Table 66. World Hydro Excavator Truck Average Price by Tank Capacity (2021-2026) & (US\$/Unit)

Table 67. World Hydro Excavator Truck Average Price by Tank Capacity (2027-2032) & (US\$/Unit)

Table 68. World Hydro Excavator Truck Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Hydro Excavator Truck Production by Application (2021-2026) & (Units)

Table 70. World Hydro Excavator Truck Production by Application (2027-2032) & (Units)

Table 71. World Hydro Excavator Truck Production Value by Application (2021-2026) & (USD Million)

Table 72. World Hydro Excavator Truck Production Value by Application (2027-2032) & (USD Million)

Table 73. World Hydro Excavator Truck Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World Hydro Excavator Truck Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. Federal Signal Basic Information, Manufacturing Base and Competitors

Table 76. Federal Signal Major Business

Table 77. Federal Signal Hydro Excavator Truck Product and Services

Table 78. Federal Signal Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Federal Signal Recent Developments/Updates

Table 80. Federal Signal Competitive Strengths & Weaknesses

Table 81. Alamo Group Basic Information, Manufacturing Base and Competitors

Table 82. Alamo Group Major Business

Table 83. Alamo Group Hydro Excavator Truck Product and Services

Table 84. Alamo Group Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Alamo Group Recent Developments/Updates

Table 86. Alamo Group Competitive Strengths & Weaknesses

Table 87. Toro Basic Information, Manufacturing Base and Competitors

Table 88. Toro Major Business

Table 89. Toro Hydro Excavator Truck Product and Services

Table 90. Toro Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Toro Recent Developments/Updates

Table 92. Toro Competitive Strengths & Weaknesses

Table 93. Vac-Con Basic Information, Manufacturing Base and Competitors

- Table 94. Vac-Con Major Business
- Table 95. Vac-Con Hydro Excavator Truck Product and Services
- Table 96. Vac-Con Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Vac-Con Recent Developments/Updates
- Table 98. Vac-Con Competitive Strengths & Weaknesses
- Table 99. Hi-Vac Basic Information, Manufacturing Base and Competitors
- Table 100. Hi-Vac Major Business
- Table 101. Hi-Vac Hydro Excavator Truck Product and Services
- Table 102. Hi-Vac Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Hi-Vac Recent Developments/Updates
- Table 104. Hi-Vac Competitive Strengths & Weaknesses
- Table 105. Vermeer Basic Information, Manufacturing Base and Competitors
- Table 106. Vermeer Major Business
- Table 107. Vermeer Hydro Excavator Truck Product and Services
- Table 108. Vermeer Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. Vermeer Recent Developments/Updates
- Table 110. Vermeer Competitive Strengths & Weaknesses
- Table 111. Foremost Basic Information, Manufacturing Base and Competitors
- Table 112. Foremost Major Business
- Table 113. Foremost Hydro Excavator Truck Product and Services
- Table 114. Foremost Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 115. Foremost Recent Developments/Updates
- Table 116. Foremost Competitive Strengths & Weaknesses
- Table 117. GapVax Basic Information, Manufacturing Base and Competitors
- Table 118. GapVax Major Business
- Table 119. GapVax Hydro Excavator Truck Product and Services
- Table 120. GapVax Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 121. GapVax Recent Developments/Updates
- Table 122. GapVax Competitive Strengths & Weaknesses
- Table 123. KAISER Premier Basic Information, Manufacturing Base and Competitors
- Table 124. KAISER Premier Major Business
- Table 125. KAISER Premier Hydro Excavator Truck Product and Services
- Table 126. KAISER Premier Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 127. KAISER Premier Recent Developments/Updates

Table 128. KAISER Premier Competitive Strengths & Weaknesses

Table 129. Westech Vac Systems Basic Information, Manufacturing Base and Competitors

Table 130. Westech Vac Systems Major Business

Table 131. Westech Vac Systems Hydro Excavator Truck Product and Services

Table 132. Westech Vac Systems Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Westech Vac Systems Recent Developments/Updates

Table 134. Westech Vac Systems Competitive Strengths & Weaknesses

Table 135. Supervac Basic Information, Manufacturing Base and Competitors

Table 136. Supervac Major Business

Table 137. Supervac Hydro Excavator Truck Product and Services

Table 138. Supervac Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Supervac Recent Developments/Updates

Table 140. Supervac Competitive Strengths & Weaknesses

Table 141. Vacvator Basic Information, Manufacturing Base and Competitors

Table 142. Vacvator Major Business

Table 143. Vacvator Hydro Excavator Truck Product and Services

Table 144. Vacvator Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Vacvator Recent Developments/Updates

Table 146. Vacvator Competitive Strengths & Weaknesses

Table 147. STG Global Basic Information, Manufacturing Base and Competitors

Table 148. STG Global Major Business

Table 149. STG Global Hydro Excavator Truck Product and Services

Table 150. STG Global Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. STG Global Recent Developments/Updates

Table 152. STG Global Competitive Strengths & Weaknesses

Table 153. Vorstrom Basic Information, Manufacturing Base and Competitors

Table 154. Vorstrom Major Business

Table 155. Vorstrom Hydro Excavator Truck Product and Services

Table 156. Vorstrom Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Vorstrom Recent Developments/Updates

- Table 158. Vorstrom Competitive Strengths & Weaknesses
- Table 159. SECO Truck Basic Information, Manufacturing Base and Competitors
- Table 160. SECO Truck Major Business
- Table 161. SECO Truck Hydro Excavator Truck Product and Services
- Table 162. SECO Truck Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 163. SECO Truck Recent Developments/Updates
- Table 164. SECO Truck Competitive Strengths & Weaknesses
- Table 165. Shandong Roadway Construction Machinery Manufacturing Basic Information, Manufacturing Base and Competitors
- Table 166. Shandong Roadway Construction Machinery Manufacturing Major Business
- Table 167. Shandong Roadway Construction Machinery Manufacturing Hydro Excavator Truck Product and Services
- Table 168. Shandong Roadway Construction Machinery Manufacturing Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 169. Shandong Roadway Construction Machinery Manufacturing Recent Developments/Updates
- Table 170. Shandong Roadway Construction Machinery Manufacturing Competitive Strengths & Weaknesses
- Table 171. Bucher Municipal Basic Information, Manufacturing Base and Competitors
- Table 172. Bucher Municipal Major Business
- Table 173. Bucher Municipal Hydro Excavator Truck Product and Services
- Table 174. Bucher Municipal Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 175. Bucher Municipal Recent Developments/Updates
- Table 176. Bucher Municipal Competitive Strengths & Weaknesses
- Table 177. Cappellotto Basic Information, Manufacturing Base and Competitors
- Table 178. Cappellotto Major Business
- Table 179. Cappellotto Hydro Excavator Truck Product and Services
- Table 180. Cappellotto Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 181. Cappellotto Recent Developments/Updates
- Table 182. Cappellotto Competitive Strengths & Weaknesses
- Table 183. KOKS Group Basic Information, Manufacturing Base and Competitors
- Table 184. KOKS Group Major Business
- Table 185. KOKS Group Hydro Excavator Truck Product and Services
- Table 186. KOKS Group Hydro Excavator Truck Production (Units), Price (US\$/Unit),

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

Table 187. KOKS Group Recent Developments/Updates

Table 188. KOKS Group Competitive Strengths & Weaknesses

Table 189. KARBA Otomotiv Basic Information, Manufacturing Base and Competitors

Table 190. KARBA Otomotiv Major Business

Table 191. KARBA Otomotiv Hydro Excavator Truck Product and Services

Table 192. KARBA Otomotiv Hydro Excavator Truck Production (Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. KARBA Otomotiv Recent Developments/Updates

Table 194. KARBA Otomotiv Competitive Strengths & Weaknesses

Table 195. Global Key Players of Hydro Excavator Truck Upstream (Raw Materials)

Table 196. Global Hydro Excavator Truck Typical Customers

Table 197. Hydro Excavator Truck Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Hydro Excavator Truck Picture

Figure 2. World Hydro Excavator Truck Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Hydro Excavator Truck Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 5. World Hydro Excavator Truck Average Price (2021-2032) & (US\$/Unit)

Figure 6. World Hydro Excavator Truck Production Value Market Share by Region (2021-2032)

Figure 7. World Hydro Excavator Truck Production Market Share by Region (2021-2032)

Figure 8. North America Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 9. Europe Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 10. China Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 11. Japan Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 12. South Korea Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 13. India Hydro Excavator Truck Production (2021-2032) & (Units)

Figure 14. Hydro Excavator Truck Market Drivers

Figure 15. Factors Affecting Demand

Figure 16. World Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 17. World Hydro Excavator Truck Consumption Market Share by Region (2021-2032)

Figure 18. United States Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 19. China Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 20. Europe Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 21. Japan Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 22. South Korea Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 23. ASEAN Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 24. India Hydro Excavator Truck Consumption (2021-2032) & (Units)

Figure 25. Producer Shipments of Hydro Excavator Truck by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 26. Global Four-firm Concentration Ratios (CR4) for Hydro Excavator Truck Markets in 2025

Figure 27. Global Four-firm Concentration Ratios (CR8) for Hydro Excavator Truck Markets in 2025

Figure 28. United States VS China: Hydro Excavator Truck Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States VS China: Hydro Excavator Truck Production Market Share Comparison (2021 & 2025 & 2032)

Figure 30. United States VS China: Hydro Excavator Truck Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 31. United States Based Manufacturers Hydro Excavator Truck Production Market Share 2025

Figure 32. China Based Manufacturers Hydro Excavator Truck Production Market Share 2025

Figure 33. Rest of World Based Manufacturers Hydro Excavator Truck Production Market Share 2025

Figure 34. World Hydro Excavator Truck Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 35. World Hydro Excavator Truck Production Value Market Share by Type in 2025

Figure 36. Truck-Mounted

Figure 37. Trailer-Mounted

Figure 38. World Hydro Excavator Truck Production Market Share by Type (2021-2032)

Figure 39. World Hydro Excavator Truck Production Value Market Share by Type (2021-2032)

Figure 40. World Hydro Excavator Truck Average Price by Type (2021-2032) & (US\$/Unit)

Figure 41. World Hydro Excavator Truck Production Value by Power System, (USD Million), 2021 & 2025 & 2032

Figure 42. World Hydro Excavator Truck Production Value Market Share by Power System in 2025

Figure 43. Diesel-powered

Figure 44. Hybrid

Figure 45. Pure Electric

Figure 46. World Hydro Excavator Truck Production Market Share by Power System (2021-2032)

Figure 47. World Hydro Excavator Truck Production Value Market Share by Power System (2021-2032)

Figure 48. World Hydro Excavator Truck Average Price by Power System (2021-2032) & (US\$/Unit)

Figure 49. World Hydro Excavator Truck Production Value by Tank Capacity, (USD Million), 2021 & 2025 & 2032

Figure 50. World Hydro Excavator Truck Production Value Market Share by Tank

Capacity in 2025

Figure 51. Tank Volume Figure 52. Tank Volume 5,000–10,000 L

Figure 53. Tank Volume > 10,000 L

Figure 54. World Hydro Excavator Truck Production Market Share by Tank Capacity (2021-2032)

Figure 55. World Hydro Excavator Truck Production Value Market Share by Tank Capacity (2021-2032)

Figure 56. World Hydro Excavator Truck Average Price by Tank Capacity (2021-2032) & (US\$/Unit)

Figure 57. World Hydro Excavator Truck Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 58. World Hydro Excavator Truck Production Value Market Share by Application in 2025

Figure 59. Municipal Engineering and Public Utilities

Figure 60. Telecommunications and Fiber Optic Infrastructure

Figure 61. Energy Sector

Figure 62. Others

Figure 63. World Hydro Excavator Truck Production Market Share by Application (2021-2032)

Figure 64. World Hydro Excavator Truck Production Value Market Share by Application (2021-2032)

Figure 65. World Hydro Excavator Truck Average Price by Application (2021-2032) & (US\$/Unit)

Figure 66. Hydro Excavator Truck Industry Chain

Figure 67. Hydro Excavator Truck Procurement Model

Figure 68. Hydro Excavator Truck Sales Model

Figure 69. Hydro Excavator Truck Sales Channels, Direct Sales, and Distribution

Figure 70. Methodology

Figure 71. Research Process and Data Source

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