

Global Underground Trackless Personnel Carrier Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Underground Trackless Personnel Carrier market size was valued at US\$ 254 million in 2025 and is forecast to a readjusted size of US\$ 366 million by 2032 with a CAGR of 5.3% during review period.

Underground Trackless Personnel Carriers are self-propelled, rubber-tired vehicles used for personnel commuting, crew transfer, maintenance crew access and emergency evacuation in underground mines, tunnel projects and other underground working environments. These vehicles are typically built on low-profile or compact mining chassis and equipped with enclosed or open passenger compartments, rollover and falling-object protection structures, seat belts, wet brakes, emergency braking systems, lighting, ventilation, communication systems, escape doors and fire-suppression systems. Higher-end models may also feature battery-electric drivetrains, flameproof configurations, air suspension, condition monitoring and remote dispatching functions. Key upstream inputs include high-strength steel, chassis frames, cabins, passenger compartments, diesel engines or electric drivetrains, battery systems, transmissions, braking systems, mining tires, seats, seat belts, mining electrical components, sensors and fire-protection components. Major downstream customers include underground metal mines, coal mines, non-metal mines, mining contractors and underground operation service providers. On an ex-factory equipment basis, global effective capacity in 2025 is estimated at about 1,380 units per year, with global sales volume of around 957 units and a weighted average selling price of approximately USD 258,000 per unit. The typical gross margin range is estimated at 21%-36%.

The global Underground Trackless Personnel Carrier market is a safety-oriented

segment within underground utility vehicles. Demand is mainly driven by deeper underground mining, longer travel distances, higher crew transport efficiency requirements and stricter mine safety regulations. As underground mines become more mechanized, workers need to move frequently between portals, ramps, maintenance bays, production areas and development headings. Simple modified vehicles are increasingly unable to meet the safety requirements of standardized mining operations in terms of braking, protection, passenger restraint, ventilation and emergency evacuation. As a result, purpose-built underground trackless personnel carriers are becoming important support vehicles for medium and large underground mines and standardized underground engineering projects.

In terms of product development, diesel-powered 16-24 person carriers remain the mainstream configuration, meeting the commuting needs of most metal mines, non-metal mines and underground engineering projects. Large deep mines require higher-capacity vehicles, enclosed passenger compartments, rollover and falling-object protection, wet braking systems, fire suppression, better ride comfort and condition monitoring, which is supporting gradual growth of above-30-person carriers and higher-safety models. In coal mine applications, product design places greater emphasis on flameproof diesel systems, flameproof electrical components, low-profile chassis and safety certification, while also adapting to roadway height, ramp conditions, passenger capacity and emergency evacuation requirements.

From a competitive perspective, the Underground Trackless Personnel Carrier market is less concentrated than the markets for underground loaders and haul trucks. Supply is provided by specialized underground service vehicle manufacturers, integrated underground mining equipment suppliers and regional custom vehicle producers. Overseas manufacturers have stronger experience in high-end personnel carriers, battery-electric models, modular utility vehicles and integrated safety systems, mainly serving large metal mines and standardized underground mining customers. Chinese suppliers are more active in small and medium-sized man carriers, non-coal underground mines and coal mine auxiliary transport applications, competing through cost advantages, shorter delivery cycles, safety-certificate adaptation and local service capability.

Future market growth will be supported by underground metal mine development, safety upgrades in coal mine auxiliary transport, replacement of old modified vehicles, higher demand for efficient underground crew movement and increasing adoption of electric utility vehicles. However, the product has a lower unit value and lower purchase frequency than primary production equipment, and the overall market size remains

relatively limited. Differences in regional safety standards, roadway dimensions, passenger capacity, flameproof requirements and customization needs also increase product development and certification costs. Overall, the Underground Trackless Personnel Carrier market is expected to maintain steady growth, with opportunities concentrated in standardized procurement by medium and large underground mines, battery-electric models, flameproof coal mine vehicles and high-safety personnel transport systems.

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

Key Features:

Global Underground Trackless Personnel Carrier market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Underground Trackless Personnel Carrier market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Underground Trackless Personnel Carrier market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Underground Trackless Personnel Carrier market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Underground Trackless Personnel Carrier

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Underground Trackless Personnel Carrier market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Epiroc, Normet, MacLean Engineering, Getman, Hermann Paus Maschinenfabrik, Fermel, TES, Bird Machines, Elphinstone, Fambition, etc.

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

Market Segmentation

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

Market segment by Type

Up to 10 Persons

11?20 Persons

Above 20 Persons

Market segment by Powertrain

Diesel-powered

Battery-electric

Other

Market segment by Cabin Type

Enclosed Cabin

Open Passenger Compartment

Other

Market segment by Application

Metal Mines

Coal Mines

Other

Major players covered

Epiroc

Normet

MacLean Engineering

Getman

Hermann Paus Maschinenfabrik

Fermel

TES

Bird Machines

Elphinstone

Fambition

Yantai Xingye Machinery

Zhaoyuan Huafeng Machinery Equipment

Qixia Dali Mining Machinery

Shanjin Heavy Industry

Hubei Tianteng Heavy Machinery

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

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

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

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

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

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Underground Trackless Personnel Carrier product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Underground Trackless Personnel Carrier, with price, sales quantity, revenue, and global market share of Underground Trackless Personnel Carrier from 2021 to 2026.

Chapter 3, the Underground Trackless Personnel Carrier competitive situation, sales

quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Underground Trackless Personnel Carrier breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

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

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

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

Chapter 13, the key raw materials and key suppliers, and industry chain of Underground Trackless Personnel Carrier.

Chapter 14 and 15, to describe Underground Trackless Personnel Carrier sales channel, distributors, customers, research findings and conclusion.

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