

Global Underground Trackless Personnel Carrier Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Underground Trackless Personnel Carrier market size is expected to reach \$ 366 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

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 studies the global Underground Trackless Personnel Carrier production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Underground Trackless Personnel Carrier 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 Underground Trackless Personnel Carrier that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Underground Trackless Personnel Carrier total production and demand, 2021-2032, (Units)

Global Underground Trackless Personnel Carrier total production value, 2021-2032, (USD Million)

Global Underground Trackless Personnel Carrier production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Underground Trackless Personnel Carrier consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Underground Trackless Personnel Carrier domestic production, consumption, key domestic manufacturers and share

Global Underground Trackless Personnel Carrier production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Underground Trackless Personnel Carrier production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Underground Trackless Personnel Carrier production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Underground Trackless Personnel Carrier 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Underground Trackless Personnel Carrier market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Underground Trackless Personnel Carrier Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underground Trackless Personnel Carrier Market, Segmentation by Type:

Up to 10 Persons

11?20 Persons

Above 20 Persons

Global Underground Trackless Personnel Carrier Market, Segmentation by Powertrain:

Diesel-powered

Battery-electric

Other

Global Underground Trackless Personnel Carrier Market, Segmentation by Cabin Type:

Enclosed Cabin

Open Passenger Compartment

Other

Global Underground Trackless Personnel Carrier Market, Segmentation by Application:

Metal Mines

Coal Mines

Other

Companies Profiled:

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

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

- 2.1 World Underground Trackless Personnel Carrier Demand (2021-2032)
- 2.2 World Underground Trackless Personnel Carrier Consumption by Region
 - 2.2.1 World Underground Trackless Personnel Carrier Consumption by Region (2021-2026)
 - 2.2.2 World Underground Trackless Personnel Carrier Consumption Forecast by Region (2027-2032)
- 2.3 United States Underground Trackless Personnel Carrier Consumption (2021-2032)
- 2.4 China Underground Trackless Personnel Carrier Consumption (2021-2032)
- 2.5 Europe Underground Trackless Personnel Carrier Consumption (2021-2032)

- 2.6 Japan Underground Trackless Personnel Carrier Consumption (2021-2032)
- 2.7 South Korea Underground Trackless Personnel Carrier Consumption (2021-2032)
- 2.8 ASEAN Underground Trackless Personnel Carrier Consumption (2021-2032)
- 2.9 India Underground Trackless Personnel Carrier Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Underground Trackless Personnel Carrier Production Value by Manufacturer (2021-2026)
- 3.2 World Underground Trackless Personnel Carrier Production by Manufacturer (2021-2026)
- 3.3 World Underground Trackless Personnel Carrier Average Price by Manufacturer (2021-2026)
- 3.4 Underground Trackless Personnel Carrier Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Underground Trackless Personnel Carrier Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Underground Trackless Personnel Carrier in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Underground Trackless Personnel Carrier in 2025
- 3.6 Underground Trackless Personnel Carrier Market: Overall Company Footprint Analysis
 - 3.6.1 Underground Trackless Personnel Carrier Market: Region Footprint
 - 3.6.2 Underground Trackless Personnel Carrier Market: Company Product Type Footprint
 - 3.6.3 Underground Trackless Personnel Carrier 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: Underground Trackless Personnel Carrier Production Value Comparison

4.1.1 United States VS China: Underground Trackless Personnel Carrier Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Underground Trackless Personnel Carrier Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Underground Trackless Personnel Carrier Production Comparison

4.2.1 United States VS China: Underground Trackless Personnel Carrier Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Underground Trackless Personnel Carrier Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Underground Trackless Personnel Carrier Consumption Comparison

4.3.1 United States VS China: Underground Trackless Personnel Carrier Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Underground Trackless Personnel Carrier Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Underground Trackless Personnel Carrier Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Underground Trackless Personnel Carrier Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Underground Trackless Personnel Carrier Production Value (2021-2026)

4.4.3 United States Based Manufacturers Underground Trackless Personnel Carrier Production (2021-2026)

4.5 China Based Underground Trackless Personnel Carrier Manufacturers and Market Share

4.5.1 China Based Underground Trackless Personnel Carrier Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Underground Trackless Personnel Carrier Production Value (2021-2026)

4.5.3 China Based Manufacturers Underground Trackless Personnel Carrier Production (2021-2026)

4.6 Rest of World Based Underground Trackless Personnel Carrier Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Underground Trackless Personnel Carrier Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Underground Trackless Personnel Carrier Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Underground Trackless Personnel Carrier

Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Underground Trackless Personnel Carrier Market Size Overview by Type:
2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Up to 10 Persons

5.2.2 11-20 Persons

5.2.3 Above 20 Persons

5.3 Market Segment by Type

5.3.1 World Underground Trackless Personnel Carrier Production by Type
(2021-2032)

5.3.2 World Underground Trackless Personnel Carrier Production Value by Type
(2021-2032)

5.3.3 World Underground Trackless Personnel Carrier Average Price by Type
(2021-2032)

6 MARKET ANALYSIS BY POWERTRAIN

6.1 World Underground Trackless Personnel Carrier Market Size Overview by
Powertrain: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Powertrain

6.2.1 Diesel-powered

6.2.2 Battery-electric

6.2.3 Other

6.3 Market Segment by Powertrain

6.3.1 World Underground Trackless Personnel Carrier Production by Powertrain
(2021-2032)

6.3.2 World Underground Trackless Personnel Carrier Production Value by Powertrain
(2021-2032)

6.3.3 World Underground Trackless Personnel Carrier Average Price by Powertrain
(2021-2032)

7 MARKET ANALYSIS BY CABIN TYPE

7.1 World Underground Trackless Personnel Carrier Market Size Overview by Cabin
Type: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Cabin Type

7.2.1 Enclosed Cabin

7.2.2 Open Passenger Compartment

7.2.3 Other

7.3 Market Segment by Cabin Type

7.3.1 World Underground Trackless Personnel Carrier Production by Cabin Type (2021-2032)

7.3.2 World Underground Trackless Personnel Carrier Production Value by Cabin Type (2021-2032)

7.3.3 World Underground Trackless Personnel Carrier Average Price by Cabin Type (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Underground Trackless Personnel Carrier Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Metal Mines

8.2.2 Coal Mines

8.2.3 Other

8.3 Market Segment by Application

8.3.1 World Underground Trackless Personnel Carrier Production by Application (2021-2032)

8.3.2 World Underground Trackless Personnel Carrier Production Value by Application (2021-2032)

8.3.3 World Underground Trackless Personnel Carrier Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Epiroc

9.1.1 Epiroc Details

9.1.2 Epiroc Major Business

9.1.3 Epiroc Underground Trackless Personnel Carrier Product and Services

9.1.4 Epiroc Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Epiroc Recent Developments/Updates

9.1.6 Epiroc Competitive Strengths & Weaknesses

9.2 Normet

9.2.1 Normet Details

- 9.2.2 Normet Major Business
- 9.2.3 Normet Underground Trackless Personnel Carrier Product and Services
- 9.2.4 Normet Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 Normet Recent Developments/Updates
- 9.2.6 Normet Competitive Strengths & Weaknesses
- 9.3 MacLean Engineering
 - 9.3.1 MacLean Engineering Details
 - 9.3.2 MacLean Engineering Major Business
 - 9.3.3 MacLean Engineering Underground Trackless Personnel Carrier Product and Services
 - 9.3.4 MacLean Engineering Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 MacLean Engineering Recent Developments/Updates
 - 9.3.6 MacLean Engineering Competitive Strengths & Weaknesses
- 9.4 Getman
 - 9.4.1 Getman Details
 - 9.4.2 Getman Major Business
 - 9.4.3 Getman Underground Trackless Personnel Carrier Product and Services
 - 9.4.4 Getman Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Getman Recent Developments/Updates
 - 9.4.6 Getman Competitive Strengths & Weaknesses
- 9.5 Hermann Paus Maschinenfabrik
 - 9.5.1 Hermann Paus Maschinenfabrik Details
 - 9.5.2 Hermann Paus Maschinenfabrik Major Business
 - 9.5.3 Hermann Paus Maschinenfabrik Underground Trackless Personnel Carrier Product and Services
 - 9.5.4 Hermann Paus Maschinenfabrik Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Hermann Paus Maschinenfabrik Recent Developments/Updates
 - 9.5.6 Hermann Paus Maschinenfabrik Competitive Strengths & Weaknesses
- 9.6 Fermel
 - 9.6.1 Fermel Details
 - 9.6.2 Fermel Major Business
 - 9.6.3 Fermel Underground Trackless Personnel Carrier Product and Services
 - 9.6.4 Fermel Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Fermel Recent Developments/Updates

9.6.6 Fermel Competitive Strengths & Weaknesses

9.7 TES

9.7.1 TES Details

9.7.2 TES Major Business

9.7.3 TES Underground Trackless Personnel Carrier Product and Services

9.7.4 TES Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 TES Recent Developments/Updates

9.7.6 TES Competitive Strengths & Weaknesses

9.8 Bird Machines

9.8.1 Bird Machines Details

9.8.2 Bird Machines Major Business

9.8.3 Bird Machines Underground Trackless Personnel Carrier Product and Services

9.8.4 Bird Machines Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Bird Machines Recent Developments/Updates

9.8.6 Bird Machines Competitive Strengths & Weaknesses

9.9 Elphinstone

9.9.1 Elphinstone Details

9.9.2 Elphinstone Major Business

9.9.3 Elphinstone Underground Trackless Personnel Carrier Product and Services

9.9.4 Elphinstone Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.9.5 Elphinstone Recent Developments/Updates

9.9.6 Elphinstone Competitive Strengths & Weaknesses

9.10 Fambition

9.10.1 Fambition Details

9.10.2 Fambition Major Business

9.10.3 Fambition Underground Trackless Personnel Carrier Product and Services

9.10.4 Fambition Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.10.5 Fambition Recent Developments/Updates

9.10.6 Fambition Competitive Strengths & Weaknesses

9.11 Yantai Xingye Machinery

9.11.1 Yantai Xingye Machinery Details

9.11.2 Yantai Xingye Machinery Major Business

9.11.3 Yantai Xingye Machinery Underground Trackless Personnel Carrier Product and Services

9.11.4 Yantai Xingye Machinery Underground Trackless Personnel Carrier Production,

Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 Yantai Xingye Machinery Recent Developments/Updates

9.11.6 Yantai Xingye Machinery Competitive Strengths & Weaknesses

9.12 Zhaoyuan Huafeng Machinery Equipment

9.12.1 Zhaoyuan Huafeng Machinery Equipment Details

9.12.2 Zhaoyuan Huafeng Machinery Equipment Major Business

9.12.3 Zhaoyuan Huafeng Machinery Equipment Underground Trackless Personnel

Carrier Product and Services

9.12.4 Zhaoyuan Huafeng Machinery Equipment Underground Trackless Personnel

Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Zhaoyuan Huafeng Machinery Equipment Recent Developments/Updates

9.12.6 Zhaoyuan Huafeng Machinery Equipment Competitive Strengths &

Weaknesses

9.13 Qixia Dali Mining Machinery

9.13.1 Qixia Dali Mining Machinery Details

9.13.2 Qixia Dali Mining Machinery Major Business

9.13.3 Qixia Dali Mining Machinery Underground Trackless Personnel Carrier Product and Services

9.13.4 Qixia Dali Mining Machinery Underground Trackless Personnel Carrier

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

9.13.5 Qixia Dali Mining Machinery Recent Developments/Updates

9.13.6 Qixia Dali Mining Machinery Competitive Strengths & Weaknesses

9.14 Shanjin Heavy Industry

9.14.1 Shanjin Heavy Industry Details

9.14.2 Shanjin Heavy Industry Major Business

9.14.3 Shanjin Heavy Industry Underground Trackless Personnel Carrier Product and Services

9.14.4 Shanjin Heavy Industry Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Shanjin Heavy Industry Recent Developments/Updates

9.14.6 Shanjin Heavy Industry Competitive Strengths & Weaknesses

9.15 Hubei Tianteng Heavy Machinery

9.15.1 Hubei Tianteng Heavy Machinery Details

9.15.2 Hubei Tianteng Heavy Machinery Major Business

9.15.3 Hubei Tianteng Heavy Machinery Underground Trackless Personnel Carrier Product and Services

9.15.4 Hubei Tianteng Heavy Machinery Underground Trackless Personnel Carrier Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.15.5 Hubei Tianteng Heavy Machinery Recent Developments/Updates

9.15.6 Hubei Tianteng Heavy Machinery Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Underground Trackless Personnel Carrier Industry Chain

10.2 Underground Trackless Personnel Carrier Upstream Analysis

10.2.1 Underground Trackless Personnel Carrier Core Raw Materials

10.2.2 Main Manufacturers of Underground Trackless Personnel Carrier Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Underground Trackless Personnel Carrier Production Mode

10.6 Underground Trackless Personnel Carrier Procurement Model

10.7 Underground Trackless Personnel Carrier Industry Sales Model and Sales Channels

10.7.1 Underground Trackless Personnel Carrier Sales Model

10.7.2 Underground Trackless Personnel Carrier 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 Underground Trackless Personnel Carrier Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Underground Trackless Personnel Carrier Production Value by Region (2021-2026) & (USD Million)

Table 3. World Underground Trackless Personnel Carrier Production Value by Region (2027-2032) & (USD Million)

Table 4. World Underground Trackless Personnel Carrier Production Value Market Share by Region (2021-2026)

Table 5. World Underground Trackless Personnel Carrier Production Value Market Share by Region (2027-2032)

Table 6. World Underground Trackless Personnel Carrier Production by Region (2021-2026) & (Units)

Table 7. World Underground Trackless Personnel Carrier Production by Region (2027-2032) & (Units)

Table 8. World Underground Trackless Personnel Carrier Production Market Share by Region (2021-2026)

Table 9. World Underground Trackless Personnel Carrier Production Market Share by Region (2027-2032)

Table 10. World Underground Trackless Personnel Carrier Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Underground Trackless Personnel Carrier Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Underground Trackless Personnel Carrier Major Market Trends

Table 13. World Underground Trackless Personnel Carrier Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Underground Trackless Personnel Carrier Consumption by Region (2021-2026) & (Units)

Table 15. World Underground Trackless Personnel Carrier Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Underground Trackless Personnel Carrier Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Underground Trackless Personnel Carrier Producers in 2025

Table 18. World Underground Trackless Personnel Carrier Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Underground Trackless Personnel Carrier Producers in 2025

Table 20. World Underground Trackless Personnel Carrier Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Underground Trackless Personnel Carrier Company Evaluation Quadrant

Table 22. World Underground Trackless Personnel Carrier Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Underground Trackless Personnel Carrier Production Site of Key Manufacturer

Table 24. Underground Trackless Personnel Carrier Market: Company Product Type Footprint

Table 25. Underground Trackless Personnel Carrier Market: Company Product Application Footprint

Table 26. Underground Trackless Personnel Carrier Competitive Factors

Table 27. Underground Trackless Personnel Carrier New Entrant and Capacity Expansion Plans

Table 28. Underground Trackless Personnel Carrier Mergers & Acquisitions Activity

Table 29. United States VS China Underground Trackless Personnel Carrier Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Underground Trackless Personnel Carrier Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Underground Trackless Personnel Carrier Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Underground Trackless Personnel Carrier Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Underground Trackless Personnel Carrier Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Underground Trackless Personnel Carrier Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Underground Trackless Personnel Carrier Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Underground Trackless Personnel Carrier Production Market Share (2021-2026)

Table 37. China Based Underground Trackless Personnel Carrier Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Underground Trackless Personnel Carrier Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Underground Trackless Personnel Carrier

Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Underground Trackless Personnel Carrier Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Underground Trackless Personnel Carrier Production Market Share (2021-2026)

Table 42. Rest of World Based Underground Trackless Personnel Carrier Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Underground Trackless Personnel Carrier Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Underground Trackless Personnel Carrier Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Underground Trackless Personnel Carrier Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Underground Trackless Personnel Carrier Production Market Share (2021-2026)

Table 47. World Underground Trackless Personnel Carrier Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Underground Trackless Personnel Carrier Production by Type (2021-2026) & (Units)

Table 49. World Underground Trackless Personnel Carrier Production by Type (2027-2032) & (Units)

Table 50. World Underground Trackless Personnel Carrier Production Value by Type (2021-2026) & (USD Million)

Table 51. World Underground Trackless Personnel Carrier Production Value by Type (2027-2032) & (USD Million)

Table 52. World Underground Trackless Personnel Carrier Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Underground Trackless Personnel Carrier Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Underground Trackless Personnel Carrier Production Value by Powertrain, (USD Million), 2021 & 2025 & 2032

Table 55. World Underground Trackless Personnel Carrier Production by Powertrain (2021-2026) & (Units)

Table 56. World Underground Trackless Personnel Carrier Production by Powertrain (2027-2032) & (Units)

Table 57. World Underground Trackless Personnel Carrier Production Value by Powertrain (2021-2026) & (USD Million)

Table 58. World Underground Trackless Personnel Carrier Production Value by Powertrain (2027-2032) & (USD Million)

Table 59. World Underground Trackless Personnel Carrier Average Price by Powertrain (2021-2026) & (K US\$/Unit)

Table 60. World Underground Trackless Personnel Carrier Average Price by Powertrain (2027-2032) & (K US\$/Unit)

Table 61. World Underground Trackless Personnel Carrier Production Value by Cabin Type, (USD Million), 2021 & 2025 & 2032

Table 62. World Underground Trackless Personnel Carrier Production by Cabin Type (2021-2026) & (Units)

Table 63. World Underground Trackless Personnel Carrier Production by Cabin Type (2027-2032) & (Units)

Table 64. World Underground Trackless Personnel Carrier Production Value by Cabin Type (2021-2026) & (USD Million)

Table 65. World Underground Trackless Personnel Carrier Production Value by Cabin Type (2027-2032) & (USD Million)

Table 66. World Underground Trackless Personnel Carrier Average Price by Cabin Type (2021-2026) & (K US\$/Unit)

Table 67. World Underground Trackless Personnel Carrier Average Price by Cabin Type (2027-2032) & (K US\$/Unit)

Table 68. World Underground Trackless Personnel Carrier Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Underground Trackless Personnel Carrier Production by Application (2021-2026) & (Units)

Table 70. World Underground Trackless Personnel Carrier Production by Application (2027-2032) & (Units)

Table 71. World Underground Trackless Personnel Carrier Production Value by Application (2021-2026) & (USD Million)

Table 72. World Underground Trackless Personnel Carrier Production Value by Application (2027-2032) & (USD Million)

Table 73. World Underground Trackless Personnel Carrier Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Underground Trackless Personnel Carrier Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Epiroc Basic Information, Manufacturing Base and Competitors

Table 76. Epiroc Major Business

Table 77. Epiroc Underground Trackless Personnel Carrier Product and Services

Table 78. Epiroc Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Epiroc Recent Developments/Updates

Table 80. Epiroc Competitive Strengths & Weaknesses
Table 81. Normet Basic Information, Manufacturing Base and Competitors
Table 82. Normet Major Business
Table 83. Normet Underground Trackless Personnel Carrier Product and Services
Table 84. Normet Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. Normet Recent Developments/Updates
Table 86. Normet Competitive Strengths & Weaknesses
Table 87. MacLean Engineering Basic Information, Manufacturing Base and Competitors
Table 88. MacLean Engineering Major Business
Table 89. MacLean Engineering Underground Trackless Personnel Carrier Product and Services
Table 90. MacLean Engineering Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. MacLean Engineering Recent Developments/Updates
Table 92. MacLean Engineering Competitive Strengths & Weaknesses
Table 93. Getman Basic Information, Manufacturing Base and Competitors
Table 94. Getman Major Business
Table 95. Getman Underground Trackless Personnel Carrier Product and Services
Table 96. Getman Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. Getman Recent Developments/Updates
Table 98. Getman Competitive Strengths & Weaknesses
Table 99. Hermann Paus Maschinenfabrik Basic Information, Manufacturing Base and Competitors
Table 100. Hermann Paus Maschinenfabrik Major Business
Table 101. Hermann Paus Maschinenfabrik Underground Trackless Personnel Carrier Product and Services
Table 102. Hermann Paus Maschinenfabrik Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. Hermann Paus Maschinenfabrik Recent Developments/Updates
Table 104. Hermann Paus Maschinenfabrik Competitive Strengths & Weaknesses
Table 105. Fermel Basic Information, Manufacturing Base and Competitors
Table 106. Fermel Major Business

Table 107. Fermel Underground Trackless Personnel Carrier Product and Services

Table 108. Fermel Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Fermel Recent Developments/Updates

Table 110. Fermel Competitive Strengths & Weaknesses

Table 111. TES Basic Information, Manufacturing Base and Competitors

Table 112. TES Major Business

Table 113. TES Underground Trackless Personnel Carrier Product and Services

Table 114. TES Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. TES Recent Developments/Updates

Table 116. TES Competitive Strengths & Weaknesses

Table 117. Bird Machines Basic Information, Manufacturing Base and Competitors

Table 118. Bird Machines Major Business

Table 119. Bird Machines Underground Trackless Personnel Carrier Product and Services

Table 120. Bird Machines Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Bird Machines Recent Developments/Updates

Table 122. Bird Machines Competitive Strengths & Weaknesses

Table 123. Elphinstone Basic Information, Manufacturing Base and Competitors

Table 124. Elphinstone Major Business

Table 125. Elphinstone Underground Trackless Personnel Carrier Product and Services

Table 126. Elphinstone Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Elphinstone Recent Developments/Updates

Table 128. Elphinstone Competitive Strengths & Weaknesses

Table 129. Fambition Basic Information, Manufacturing Base and Competitors

Table 130. Fambition Major Business

Table 131. Fambition Underground Trackless Personnel Carrier Product and Services

Table 132. Fambition Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Fambition Recent Developments/Updates

Table 134. Fambition Competitive Strengths & Weaknesses

Table 135. Yantai Xingye Machinery Basic Information, Manufacturing Base and Competitors

Table 136. Yantai Xingye Machinery Major Business

Table 137. Yantai Xingye Machinery Underground Trackless Personnel Carrier Product and Services

Table 138. Yantai Xingye Machinery Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Yantai Xingye Machinery Recent Developments/Updates

Table 140. Yantai Xingye Machinery Competitive Strengths & Weaknesses

Table 141. Zhaoyuan Huafeng Machinery Equipment Basic Information, Manufacturing Base and Competitors

Table 142. Zhaoyuan Huafeng Machinery Equipment Major Business

Table 143. Zhaoyuan Huafeng Machinery Equipment Underground Trackless Personnel Carrier Product and Services

Table 144. Zhaoyuan Huafeng Machinery Equipment Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Zhaoyuan Huafeng Machinery Equipment Recent Developments/Updates

Table 146. Zhaoyuan Huafeng Machinery Equipment Competitive Strengths & Weaknesses

Table 147. Qixia Dali Mining Machinery Basic Information, Manufacturing Base and Competitors

Table 148. Qixia Dali Mining Machinery Major Business

Table 149. Qixia Dali Mining Machinery Underground Trackless Personnel Carrier Product and Services

Table 150. Qixia Dali Mining Machinery Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Qixia Dali Mining Machinery Recent Developments/Updates

Table 152. Qixia Dali Mining Machinery Competitive Strengths & Weaknesses

Table 153. Shanjin Heavy Industry Basic Information, Manufacturing Base and Competitors

Table 154. Shanjin Heavy Industry Major Business

Table 155. Shanjin Heavy Industry Underground Trackless Personnel Carrier Product and Services

Table 156. Shanjin Heavy Industry Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Shanjin Heavy Industry Recent Developments/Updates

Table 158. Shanjin Heavy Industry Competitive Strengths & Weaknesses

Table 159. Hubei Tianteng Heavy Machinery Basic Information, Manufacturing Base and Competitors

Table 160. Hubei Tianteng Heavy Machinery Major Business

Table 161. Hubei Tianteng Heavy Machinery Underground Trackless Personnel Carrier Product and Services

Table 162. Hubei Tianteng Heavy Machinery Underground Trackless Personnel Carrier Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Hubei Tianteng Heavy Machinery Recent Developments/Updates

Table 164. Hubei Tianteng Heavy Machinery Competitive Strengths & Weaknesses

Table 165. Global Key Players of Underground Trackless Personnel Carrier Upstream (Raw Materials)

Table 166. Global Underground Trackless Personnel Carrier Typical Customers

Table 167. Underground Trackless Personnel Carrier Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Underground Trackless Personnel Carrier Picture

Figure 2. World Underground Trackless Personnel Carrier Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Underground Trackless Personnel Carrier Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Underground Trackless Personnel Carrier Production (2021-2032) & (Units)

Figure 5. World Underground Trackless Personnel Carrier Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Underground Trackless Personnel Carrier Production Value Market Share by Region (2021-2032)

Figure 7. World Underground Trackless Personnel Carrier Production Market Share by Region (2021-2032)

Figure 8. North America Underground Trackless Personnel Carrier Production (2021-2032) & (Units)

Figure 9. Europe Underground Trackless Personnel Carrier Production (2021-2032) & (Units)

Figure 10. China Underground Trackless Personnel Carrier Production (2021-2032) & (Units)

Figure 11. Japan Underground Trackless Personnel Carrier Production (2021-2032) & (Units)

Figure 12. Underground Trackless Personnel Carrier Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 15. World Underground Trackless Personnel Carrier Consumption Market Share by Region (2021-2032)

Figure 16. United States Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 17. China Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 18. Europe Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 19. Japan Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 20. South Korea Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 21. ASEAN Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 22. India Underground Trackless Personnel Carrier Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Underground Trackless Personnel Carrier by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Underground Trackless Personnel Carrier Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Underground Trackless Personnel Carrier Markets in 2025

Figure 26. United States VS China: Underground Trackless Personnel Carrier Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Underground Trackless Personnel Carrier Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Underground Trackless Personnel Carrier Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Underground Trackless Personnel Carrier Production Market Share 2025

Figure 30. China Based Manufacturers Underground Trackless Personnel Carrier Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Underground Trackless Personnel Carrier Production Market Share 2025

Figure 32. World Underground Trackless Personnel Carrier Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Underground Trackless Personnel Carrier Production Value Market Share by Type in 2025

Figure 34. Up to 10 Persons

Figure 35. 11-20 Persons

Figure 36. Above 20 Persons

Figure 37. World Underground Trackless Personnel Carrier Production Market Share by Type (2021-2032)

Figure 38. World Underground Trackless Personnel Carrier Production Value Market Share by Type (2021-2032)

Figure 39. World Underground Trackless Personnel Carrier Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Underground Trackless Personnel Carrier Production Value by Powertrain, (USD Million), 2021 & 2025 & 2032

Figure 41. World Underground Trackless Personnel Carrier Production Value Market Share by Powertrain in 2025

Figure 42. Diesel-powered

Figure 43. Battery-electric

Figure 44. Other

Figure 45. World Underground Trackless Personnel Carrier Production Market Share by Powertrain (2021-2032)

Figure 46. World Underground Trackless Personnel Carrier Production Value Market Share by Powertrain (2021-2032)

Figure 47. World Underground Trackless Personnel Carrier Average Price by Powertrain (2021-2032) & (K US\$/Unit)

Figure 48. World Underground Trackless Personnel Carrier Production Value by Cabin Type, (USD Million), 2021 & 2025 & 2032

Figure 49. World Underground Trackless Personnel Carrier Production Value Market Share by Cabin Type in 2025

Figure 50. Enclosed Cabin

Figure 51. Open Passenger Compartment

Figure 52. Other

Figure 53. World Underground Trackless Personnel Carrier Production Market Share by Cabin Type (2021-2032)

Figure 54. World Underground Trackless Personnel Carrier Production Value Market Share by Cabin Type (2021-2032)

Figure 55. World Underground Trackless Personnel Carrier Average Price by Cabin Type (2021-2032) & (K US\$/Unit)

Figure 56. World Underground Trackless Personnel Carrier Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Underground Trackless Personnel Carrier Production Value Market Share by Application in 2025

Figure 58. Metal Mines

Figure 59. Coal Mines

Figure 60. Other

Figure 61. World Underground Trackless Personnel Carrier Production Market Share by Application (2021-2032)

Figure 62. World Underground Trackless Personnel Carrier Production Value Market Share by Application (2021-2032)

Figure 63. World Underground Trackless Personnel Carrier Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 64. Underground Trackless Personnel Carrier Industry Chain

Figure 65. Underground Trackless Personnel Carrier Procurement Model

Figure 66. Underground Trackless Personnel Carrier Sales Model

Figure 67. Underground Trackless Personnel Carrier Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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