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Global New Energy Single-Drum Roller Market Growth 2026-2032

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Abstracts

The global New Energy Single-Drum Roller market size is predicted to grow from US$ 1.33 million in 2025 to US$ 31.81 million in 2032; it is expected to grow at a CAGR of 52.4% from 2026 to 2032.

A New Energy Single-Drum Roller is a piece of construction machinery powered by a new energy system—utilizing batteries, electric motors, electronic control systems, or other new energy solutions instead of traditional diesel engines—and featuring a single vibrating steel drum as its primary compaction mechanism. These machines are designed to compact soil, gravel, crushed stone, and road base materials. Compared to traditional diesel-powered single-drum rollers, new energy models offer advantages such as low emissions, low noise levels, high energy efficiency, and reduced maintenance costs. They are particularly well-suited for green construction projects, urban infrastructure development, highway roadbed construction, and operations at airports, ports, mining sites, and large-scale earthworks. Typical applications include highway roadbed engineering, airport runway foundation work, port yard construction, industrial park infrastructure, and mining road construction.

Key Findings

Global New Energy Single-Drum Roller production reached approximately 13 units in 2025, with an average selling price of around US$104,920 per unit

Chinese manufacturers are promoting the development of New Energy Single-Drum Rollers toward large-scale models above 20 tons

New Energy Single-Drum Rollers mainly target soil compaction and large-scale

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infrastructure construction scenarios

Large-capacity batteries, high-voltage electric drive systems, and intelligent control technologies are becoming key upgrade directions

Chinese companies including XCMG, LiuGong, Shantui, and SANY are actively expanding into the new energy single-drum road roller market

Market Trends

The New Energy Single-Drum Roller market is currently transitioning from technology validation toward commercial application. Compared with electric tandem drum rollers, which have already developed relatively mature light-duty product systems, single-drum products require higher continuous power output, stronger excitation force, and longer operating duration, creating higher requirements for battery capacity, electric drive power, and thermal management technologies. As a result, commercialization progress remains relatively slower. The current market development is mainly focused on large-tonnage new energy construction machinery promoted by Chinese manufacturers, with products mainly targeting soil compaction equipment above 10 tons, especially models above 20 tons. With improvements in battery energy density, maturation of high-voltage electric drive platforms, and better charging infrastructure at construction sites, new energy single-drum road rollers are expected to gradually move from demonstration applications toward broader commercial adoption. Future technology development will focus on large-capacity battery systems, high-power electric motors, intelligent compaction control systems, and remote equipment management platforms. Chinese manufacturers are expected to establish competitive advantages in the medium- and large-sized new energy single-drum road roller segment by leveraging advantages in battery supply chains, construction machinery manufacturing experience, and cost control capabilities.

Market Dynamics

Drivers

Growth of the New Energy Single-Drum Roller market is mainly driven by construction machinery electrification, green infrastructure development, and stricter emission management for non-road mobile machinery. Compared with traditional diesel single-drum road rollers, new energy products can reduce construction-site emissions while lowering fuel consumption and engine maintenance requirements, making them more

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aligned with low-carbon construction and green engineering trends. As environmental requirements increase in government projects, urban renewal projects, and large infrastructure developments, new energy single-drum road rollers are expected to gain more application opportunities in airports, highways, ports, industrial parks, and other construction scenarios. In addition, China's mature new energy supply chain and declining costs of batteries, electric motors, and electronic control systems provide a foundation for the commercialization of new energy single-drum road rollers.

Restraints

New energy single-drum road rollers face challenges including higher purchase costs, limited operating range, and insufficient charging infrastructure at construction sites. Since single-drum road rollers are typically used in long-duration and high-load compaction operations, their power requirements are significantly higher than light-duty tandem drum rollers, requiring larger battery systems and increasing total equipment costs. Meanwhile, construction environments such as highways, mining areas, and remote infrastructure projects often have complex operating conditions and limited charging facilities, which may affect continuous operation capability. In addition, customers still need to further evaluate battery lifespan, maintenance systems, and residual values of used equipment, which may slow early market penetration.

Opportunities

With the advancement of global green construction policies and increasing electrification of large construction machinery, new energy single-drum road rollers will gain additional opportunities in large-scale infrastructure projects. Future growth scenarios will include highway construction, airport runway foundations, port logistics facilities, mining roads, and industrial park development. Chinese manufacturers have advantages from a relatively complete new energy construction machinery supply chain and are expanding from light electric equipment toward large-scale electric compaction machinery. As battery prices decline and high-voltage electric drive technologies mature, new energy single-drum road rollers are expected to gradually narrow the cost gap with traditional diesel equipment and improve customer adoption willingness.

Challenges

The new energy single-drum road roller industry faces challenges related to technology development, market demand, and international competition. European and American traditional construction machinery manufacturers have long-term experience in compaction equipment and established global distribution networks, while Chinese

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manufacturers, despite advantages in new energy supply chains, still need to improve overseas certifications, after-sales service capabilities, and acceptance among high-end customers. In addition, large-tonnage new energy equipment has higher requirements for battery safety, thermal management, and system reliability, meaning insufficient performance of any key component may affect commercial expansion. Fluctuations in battery raw material prices may also influence cost control for large new energy road rollers.

Industry Chain Analysis

The new energy single-drum road roller industry chain consists mainly of upstream new energy power system suppliers, midstream complete equipment manufacturers, and downstream construction applications. The upstream segment includes power batteries, battery materials, electric motors, electronic control systems, power semiconductors, thermal management systems, and traditional road roller structural components. Among these, batteries, motors, and electronic control systems represent the core value components that determine equipment performance and cost. The midstream segment is mainly composed of construction machinery manufacturers responsible for complete machine design, power system integration, compaction mechanism development, and sales services, including XCMG Group, LiuGong Group, Shantui Construction Machinery, SANY Group, and Xiamen XGMA Machinery. The downstream customer base includes road construction companies, municipal engineering organizations, infrastructure contractors, mining companies, and construction equipment rental companies. As the new energy construction machinery supply chain continues to mature, declining battery costs and increasing localization of components will accelerate the adoption of new energy single-drum road rollers.

Segment Insights

From a product structure perspective, new energy single-drum road rollers are currently mainly focused on medium- and large-sized product development and remain at an earlier commercialization stage compared with electric tandem drum rollers. Based on operating weight, products can be categorized into light-duty, medium-duty, and heavy-duty models, with equipment above 10 tons, particularly above 20 tons, becoming a key development direction for manufacturers. Large single-drum road rollers require stronger excitation force, deeper compaction capability, and longer operating endurance, making them suitable for demanding applications such as highway foundations, airport construction, and large infrastructure projects.

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From a technology perspective, new energy single-drum road rollers are mainly developing toward pure electric drive solutions, with improvements in battery capacity, high-voltage electric platforms, and intelligent control systems. As these technologies mature, the product range is expected to expand from demonstration equipment toward commercial solutions capable of replacing traditional diesel-powered single-drum rollers in selected applications.

Downstream Market Opportunities

New energy single-drum road rollers are mainly applied in soil compaction, road base construction, and large-scale infrastructure projects. Major customers include highway construction companies, airport contractors, port engineering companies, mining enterprises, and large construction equipment rental companies. Due to their stronger compaction capability compared with tandem drum rollers, single-drum products are more suitable for large engineering projects with higher power and durability requirements. With increasing demand for green construction, new energy single-drum road rollers are expected to achieve broader adoption in low-emission construction zones, major public infrastructure projects, and environmentally sensitive applications.

Regional Insights

China is currently an important market for the research, development, and commercialization of new energy single-drum road rollers. China has a leading power battery supply chain and a mature construction machinery manufacturing ecosystem, while companies including XCMG, LiuGong, Shantui, SANY, and Xiamen XGMA are actively developing new energy compaction equipment. Compared with European markets, which are currently more focused on light- and medium-duty electric products, Chinese manufacturers are paying greater attention to medium- and large-sized new energy single-drum road rollers and building differentiated competitiveness through higher operating weights and broader engineering applications.

Although Europe and North America currently have smaller new energy single-drum road roller markets, both regions have mature construction machinery customer bases and strong demand for green construction solutions. With the advancement of zero-emission construction policies, expansion of equipment rental markets, and accelerated electrification of large construction machinery, new energy single-drum road rollers are expected to gradually expand worldwide.

Competitive Landscape Analysis

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The global new energy single-drum road roller market is still in an early development stage, with competition mainly concentrated among Chinese construction machinery manufacturers. Companies including XCMG Group, LiuGong Group, Shantui Construction Machinery, SANY Group, and Xiamen XGMA are actively developing new energy single-drum road roller products by leveraging their established construction machinery manufacturing capabilities and new energy supply chains. Among them, XCMG has established an early presence in new energy road machinery and developed a product portfolio covering multiple new energy roller categories, including single-drum and tandem drum solutions. Future competition will mainly focus on electric power system efficiency, battery cost control, equipment reliability, product weight coverage, and overseas distribution channels. Compared with traditional road roller markets, the new energy single-drum road roller sector has not yet formed a stable global competitive structure. Chinese manufacturers are expected to leverage their advantages in battery supply chains and manufacturing scale, while international manufacturers may compete through brand reputation, technical experience, and global service networks. Overall, new energy single-drum road rollers represent an important development direction for construction machinery electrification toward larger-scale and higher-performance applications.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “New Energy Single-Drum Roller Industry Forecast” looks at past sales and reviews total world New Energy Single-Drum Roller sales in 2025, providing a comprehensive analysis by region and market sector of projected New Energy Single-Drum Roller sales for 2026 through 2032. With New Energy Single-Drum Roller sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world New Energy Single-Drum Roller industry.

This Insight Report provides a comprehensive analysis of the global New Energy Single-Drum Roller landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on New Energy Single-Drum Roller portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global New Energy Single-Drum Roller market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for New Energy Single-Drum Roller and breaks down the

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forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global New Energy Single-Drum Roller.

This report presents a comprehensive overview, market shares, and growth opportunities of New Energy Single-Drum Roller market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Pure Electric Single Steel Wheel

Hybrid Electric Single Steel Wheel

Segmentation by Operating Weight:

Light-Duty Single-Drum Roller (Under 10 Tons)

Medium-Duty Single-Drum Roller (10–20 Tons)

Heavy-Duty Single-Drum Roller (Over 20 Tons)

Segmentation by Drive Type:

Direct Electric Motor Drive

Electro-Hydraulic Drive

Segmentation by Application:

Urban Infrastructure Construction

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Highway Roadbed Construction

Airports and Port

Mining Road

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

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France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

XCMG Group

LiuGong Group

Shantui Construction Machinery

SANY Group

Xiamen XGMA Machinery

Key Questions Addressed in this Report

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What is the 10-year outlook for the global New Energy Single-Drum Roller market?

What factors are driving New Energy Single-Drum Roller market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do New Energy Single-Drum Roller market opportunities vary by end market size?

How does New Energy Single-Drum Roller break out by Type, by Application?

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