

Global Underground Trackless Personnel Carrier Market Growth 2026-2032

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Abstracts

The global Underground Trackless Personnel Carrier market size is predicted to grow from US\$ 242 million in 2025 to US\$ 355 million in 2032; it is expected to grow at a CAGR of 5.6% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Underground Trackless Personnel Carrier Industry Forecast" looks at past sales and reviews total world Underground Trackless Personnel Carrier sales in 2025, providing a comprehensive analysis by region and market sector of projected Underground Trackless Personnel Carrier sales for 2026 through 2032. With Underground Trackless Personnel Carrier sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Underground Trackless Personnel Carrier industry.

This Insight Report provides a comprehensive analysis of the global Underground Trackless Personnel Carrier 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 Underground Trackless Personnel Carrier portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Underground Trackless Personnel Carrier market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Underground Trackless Personnel Carrier and breaks down the 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 Underground Trackless Personnel Carrier.

This report presents a comprehensive overview, market shares, and growth opportunities of Underground Trackless Personnel Carrier market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Up to 10 Persons

11–20 Persons

Above 20 Persons

Segmentation by Powertrain:

Diesel-powered

Battery-electric

Other

Segmentation by Cabin Type:

Enclosed Cabin

Open Passenger Compartment

Other

Segmentation by Application:

Metal Mines

Coal Mines

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

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.

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 Addressed in this Report

What is the 10-year outlook for the global Underground Trackless Personnel Carrier market?

What factors are driving Underground Trackless Personnel Carrier market growth, globally and by region?

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

How do Underground Trackless Personnel Carrier market opportunities vary by end market size?

How does Underground Trackless Personnel Carrier break out by Type, by Application?

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