

Autonomous Construction Equipment Market by Equipment (Dozers, Dump Trucks, Loaders, Excavators, Haul Trucks, & Compactors), Level of Automation (Semi & Fully Autonomous), Propulsion, Application, Power Output & Region - Global Forecast to 2030

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Abstracts

The autonomous construction equipment market is projected to grow from USD 4.43 billion in 2024 to USD 9.86 billion by 2030 at a CAGR of 14.3%. The need for automation in farm tractors, particularly in vineyards, enhances precision in tasks like planting, pruning, and harvesting, resulting in improved yield and reduced labor costs. In mining, automation of underground equipment allows for safer operations in remote locations, minimizing risks to workers and increasing productivity by enabling 24/7 operations. In the construction sector, automating both compact and large equipment streamlines workflows, boosts efficiency, and enhances safety by reducing human exposure to potentially hazardous environments.

OEMs from agricultural industries like John Deere (US) have introduced See & Spray Ultimate technology. This technology uses 36 cameras mounted on the boom to scan over 2,100 square feet per second.

'Semi-Autonomous Construction Equipment segment is expected to be the largest market by Level of Automation.'

Automation in construction equipment is revolutionizing industries like mining, construction, and agriculture through advanced technologies such as sensors, AI, and high-resolution cameras. Semi-autonomous construction equipment hold the largest

market share due to the balance between automation and human control, letting operators manage complicated tasks while providing improved safety, efficiency, and lower labor requirements, all without the limited incremental expenses, skipping the regulatory hurdles that come with full autonomy. Semi-autonomous construction equipment are increasingly transforming construction and mining operations with advanced technology, which enhances safety and operational efficiency. Technologies such as Grade Assist in excavators automate boom and bucket control by Caterpillar, allowing operators to focus on critical tasks and significantly reducing the need for frequent grade checks. Similarly, John Deere's AutoTrac tractor system utilizes GPS and RTK technology for precise guidance along predetermined paths. Loaders benefit from payload management systems that ensure safe handling. Leading OEMs are advancing these technologies to further boost productivity and safety. Hence, the increasing use of several automated features for reducing human control and helping in operation efficiency with cost-competitive pricing will drive the demand for the semi-autonomous construction equipment segment.

'Mining equipment are expected to be the promising application of all autonomous construction equipment.'

The mining industry has increasingly adopted automation across various equipment to enhance operational efficiency and safety, including dump trucks, loaders, excavators, etc. These autonomous systems are utilized for extracting minerals such as coal, gold, copper, and iron ore, focusing on underground mining applications. Countries like Australia have been leaders in adopting autonomous solutions, while Latin American countries such as Colombia and Chile are also integrating these technologies to optimize their mining activities. Major mining companies, including BHP, Rio Tinto, and Vale, have been at the forefront of implementing autonomous solutions driven by the need to improve productivity, ensure worker safety, and address the challenges of operating in remote and hazardous environments. Leading OEMs like Liebherr, AB Volvo, and Sandvik have led this transformation. Sandvik plans to launch the AutoMine Interoperable Access Control System (ACS) in 2024, enhancing productivity by enabling third-party autonomous equipment to operate within its safety zones.

'Asia Pacific is Estimated to Fastest Growing Autonomous Construction Equipment Market.'

The growth of autonomous construction equipment in Asia Pacific is mainly driven by factors such as government initiatives supporting autonomous vehicle deployment and advancements in safety technologies.

The Autonomous construction equipment market is witnessing rapid year-on-year growth in the Asia Pacific region, which comprises some of the fastest-developing economies globally, such as China, Japan, Australia, Indonesia, and India, driven by the increasing need for efficiency, safety, and environmental sustainability across key sectors such as mining, construction, and agriculture. The demand for autonomous construction equipment is growing significantly in Asia Pacific is mainly due to several projects undertaken, such as dams, airports, and hydroelectricity, in the past. This provided an opportunity for the penetration of autonomous construction equipment market. Further, The continuously increasing demand for automation in mining equipment in countries such as China, Indonesia, and Australia is also expected to drive the demand for electric autonomous mining equipment in Asia Pacific. Battery electric mining equipment is ideal for incorporating autonomous technology as it is easier for autonomous computing systems to operate battery-electric equipment.

Major players, including Komatsu, HD Hyundai, Sany, and Caterpillar, are launching innovative semi & fully autonomous equipment in the Asia Pacific. For instance, products like Komatsu's HD605-7 AC autonomous mining truck and John Deere's autonomous farm tractor are designed to optimize operations and reduce labor costs. Further, recent partnerships, such as the one between Hexagon and BUMA in Indonesia and the development of advanced technologies like Hitachi's Real-Time Digital Twin Platform, are accelerating market growth in this region. As the region's infrastructure development and mining operations expand, the demand for autonomous solutions is expected to rise.

The breakup of primary respondents

By Company: OEMs – 70%, Component Manufacturers -30%

By Designation: C-Level Executives - 30%, Director Levels- 60%, Others – 10%

By Region: Europe - 20%, Asia Pacific - 55%, Americas- 25%

The autonomous construction equipment market will be dominated by global players, including Deere & Company (US), CNH Industrial (UK), Caterpillar (US), Komatsu Ltd (Japan), Libherr Group (Switzerland), Hitachi Construction Machinery Co., Ltd (Japan), Volvo Construction Equipment (Sweden), Doosan Bobcat (South Korea), Built Robotics (Us), HD Hyundai (South Korea), and Sandvik (Sweden). The study includes an in-

depth competitive analysis of these key players in the autonomous construction equipment market with their company profiles, recent developments, and key market strategies.

Research Coverage

The study's primary objective is to define, describe, and forecast the autonomous construction equipment market by volume and value. The study segments of the Autonomous Construction Equipment Market are by equipment type (Dozers, Dump Trucks, Loaders, Excavators, Haul Trucks, compactors (road roller), and Farm Tractors), power output (251 HP), propulsion (Diesel and Electric & Hybrid), level of automation (Autonomous and Semi-Autonomous), Application (Construction, Mining, and Agriculture), and region (Americas, Europe, and Asia Pacific). It analyzes the opportunities offered by various market segments to the stakeholders. It tracks and analyzes competitive developments such as market ranking analysis, joint ventures, acquisitions, and other activities by key industry participants.

The report provides insights on the following pointers:

Analysis of key drivers (Growth in infrastructure development and mining activities, and rising automation in vineyards), restraints (high initial investment), opportunities (Advancements in AI and Machine learning), and challenges (Cybersecurity Risks).

Product Development/Innovation: Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the autonomous construction equipment market.

Market Diversification: Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the autonomous construction equipment market

Competitive Assessment: In-depth assessment of market share analysis, growth strategies, and product offerings of leading players in the autonomous construction equipment market, such as Deere & Company (US), CNH Industrial (UK), Caterpillar (US, Komatsu Ltd (Japan), Libherr Group (Switzerland), Hitachi Construction Machinery Co., Ltd (Japan), Volvo Construction Equipment (Sweden), Doosan Bobcat (South Korea), Built Robotics (Us), HD Hyundai (South Korea), and Sandvik (Sweden).

The report showcases Qualitative insights on the component (LIDAR, RADAR, GPS, camera/vision system, and ultrasonic sensors) chapter.

The report analyze the pricing analysis, OEM analysis, and key buying criteria of the autonomous construction equipment market.

The report showcases technological developments impacting the market

Analysis of markets concerning individual growth trends, prospects, and contributions to the total market

Detailed OEM analysis for Power Output Vs. Number of Equipment.

Analysis of the supply chain analysis, ecosystem analysis, patent analysis, trade analysis, and case study analysis.

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