

# Underground Construction Equipment Market to Reach \$13.4 Billion by 2032, Growing at 5.9% CAGR | Allied Market Research

*Rising Urban Infrastructure Development, Expansion of Metro Projects, and Growing Demand for Advanced Excavation Technologies Drive Global Market Growth*

WILMINGTON, DE, UNITED STATES, June 25, 2026 /EINPresswire.com/ -- Allied Market Research published a report titled, "[Underground Construction Equipment Market by Equipment Type \(Tunnel Boring Machines, Drilling Jumbos,](#)

[Roadheaders, Load Haul Dump Machines, and Others\), Application \(Mining, Tunneling, Infrastructure Development, and Others\): Global Opportunity Analysis and Industry Forecast, 2023–2032.](#)" According to the report, the global underground construction equipment market was valued at \$8.2 billion in 2022 and is projected to reach \$13.4 billion by 2032, registering a CAGR of 5.9% from 2023 to 2032. (alliedmarketresearch.com)

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Rising infrastructure investments and growing urban tunneling projects are accelerating demand for advanced underground construction equipment worldwide.”

*Allied Market Research  
Analyst*

The market is witnessing steady growth due to increasing investments in urban infrastructure development, expansion of metro rail and tunneling projects, and rising demand for advanced mechanized excavation solutions. Rapid urbanization, population growth, and government-backed infrastructure modernization programs are further fueling global demand for underground construction equipment.



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Underground construction equipment plays a critical role in mining, tunneling, and

infrastructure development projects by enabling efficient excavation, material handling, and structural development in challenging subsurface environments. These machines enhance productivity, improve safety standards, and reduce project completion timelines.

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The increasing number of large-scale infrastructure projects worldwide, particularly metro rail systems, road tunnels, and underground utilities, is a key driver of market expansion. Governments across both developed and emerging economies are investing heavily in underground transportation networks to reduce traffic congestion and improve urban mobility.

In the mining sector, rising demand for minerals and metals is also contributing to increased adoption of advanced underground equipment. Companies are increasingly deploying automated and high-capacity machinery to improve operational efficiency and ensure worker safety in deep mining operations.

Technological advancements such as remote-controlled equipment, GPS-based navigation systems, and automation in tunneling operations are further transforming the underground construction landscape.

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### By Equipment Type

The tunnel boring machines (TBM) segment accounted for the largest market share in 2022, driven by extensive use in metro rail and large-scale tunneling projects. (alliedmarketresearch.com)

Roadheaders and drilling jumbos are also witnessing strong demand, particularly in mining and hard-rock excavation applications. Load haul dump machines continue to play a crucial role in material transport and underground logistics operations.

### By Application

The infrastructure development segment dominated the market in 2022, supported by increasing urbanization and large-scale government investments in transportation and utility networks. (alliedmarketresearch.com)

Mining applications also account for a significant share, driven by rising demand for metals, coal, and mineral resources globally. Tunneling projects continue to expand due to metro rail expansion and highway construction in densely populated cities.

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## North America

North America held a significant share of the underground construction equipment market in 2022, driven by ongoing infrastructure upgrades, mining activities, and investments in underground transportation systems. (alliedmarketresearch.com)

## Europe

Europe remains a key market due to strong focus on sustainable infrastructure development, extensive metro rail networks, and advanced tunneling technologies used in urban construction projects.

## Asia-Pacific

Asia-Pacific is expected to witness the fastest growth during the forecast period, driven by rapid urbanization, massive infrastructure investments, and expanding metro rail projects in countries such as China, India, Japan, and Southeast Asia.

## LAMEA

The LAMEA region is experiencing steady growth supported by increasing mining operations, infrastructure modernization programs, and rising investments in transportation networks.

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Key emerging trends in the underground construction equipment industry include:

- > Automation and remote-controlled excavation systems
- > AI-powered tunneling and navigation technologies
- > Electric and hybrid underground machinery
- > IoT-enabled equipment monitoring and predictive maintenance
- > Advanced safety systems for underground operations
- > High-precision GPS and laser-guided drilling systems
- > Modular and energy-efficient equipment designs
- > Integration of digital twin technology in construction planning
- > Improved dust and emission control systems
- > Smart fleet management solutions for construction projects

These innovations are improving operational efficiency, enhancing worker safety, and reducing environmental impact in underground construction projects.

Global Underground Construction Equipment Market

- > The global [Underground Construction Equipment Market](#) was valued at \$8.2 billion in 2022.
- > The market is projected to reach \$13.4 billion by 2032.
- > The industry is expected to grow at a CAGR of 5.9% from 2023 to 2032.
- > Tunnel boring machines dominated the equipment type segment in 2022.
- > Infrastructure development accounted for the largest application share.
- > Mining remains a key end-use industry for underground equipment.
- > Asia-Pacific is expected to register the fastest growth during the forecast period.
- > Automation and electrification are key emerging industry trends.
- > Rising urban infrastructure investments are a major growth driver.

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Key Companies Profiled in the Report

Key companies profiled in the report include:

Caterpillar Inc.  
Komatsu Ltd.  
Sandvik AB  
Hitachi Construction Machinery Co., Ltd.  
Atlas Copco AB  
Liebherr Group  
Epiroc AB  
Volvo Construction Equipment  
Herrenknecht AG  
Doosan Infracore

These companies are focusing on technological innovation, automation integration, strategic partnerships, and expansion into emerging markets to strengthen their global presence.

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Industry stakeholders including construction firms, mining companies, infrastructure developers, and equipment manufacturers can access the complete Underground Construction Equipment Market report from Allied Market Research.

The report provides comprehensive insights into market dynamics, competitive landscape,

technological advancements, regional outlook, and future growth opportunities to support strategic planning and investment decisions.

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Through data-driven methodologies and in-depth analysis, Allied Market Research helps

organizations identify growth opportunities, evaluate market trends, and develop effective strategies across multiple industrial sectors.

David Correa

Allied Market Research

+ 1 800-792-5285

help@alliedmarketresearch.com

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