

Road Maintenance Market on Track to Reach \$326.77 Billion by 2035 as Infrastructure Investment Hits Record Levels

North America's road maintenance market is valued at roughly USD 42.2 billion in 2025, sustained by the IJIA's multi-year highway funding.

OR, UNITED STATES, August 13, 2026 /EINPresswire.com/ -- The global [road maintenance market](#) is riding a wave of unprecedented government spending on transportation infrastructure. Valued at an estimated \$210.82 billion in 2025, the market is projected to grow from \$220.27 billion in 2026 to approximately \$326.77 billion by 2035, registering a compound annual growth rate of 4.48%. This steady expansion is anchored by multi-decade policy commitments that extend well beyond short-term stimulus cycles, from India's Bharatmala Pariyojana program, which has earmarked over \$67 billion for highway development, to the U.S. Infrastructure Investment and Jobs Act committing \$110 billion to roads and bridges through 2031.



Road Maintenance Market (2026 - 2035)

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Road Maintenance Market: Infrastructure Investment, Smart Technologies, and Sustainable Solutions Drive Growth”

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A Technological Revolution on the Worksite

The road maintenance industry is undergoing a profound technological transformation. Legacy diesel-powered fleets are giving way to telematics-enabled, GPS-guided, and increasingly electric machinery platforms. Original equipment manufacturers are integrating Internet of Things sensors and predictive analytics into wheel loaders,

[road rollers](#), and motor graders, shifting maintenance approaches from reactive breakdown repair to condition-based prevention. Caterpillar's 2024 announcement of a \$1 billion investment in autonomous and electrified equipment development underscores the scale of research and development capital flowing into next-generation road machinery. Modern GPS-

guided motor graders equipped with 3D machine-control systems from providers like Trimble, Topcon, and Leica have elevated productivity by 30–40% on grade-sensitive projects, reducing survey staking requirements and enabling single-operator workflows.

Market Size and Forecast Trajectory

Market Research Future's estimates integrate primary interviews with OEM executives, fleet operators, and procurement authorities alongside secondary data from national statistical agencies, infrastructure investment databases, and trade associations. Historical figures from 2021 through 2024 are calibrated against audited annual reports of leading manufacturers. The market has grown from \$183.2 billion in 2021 and is expected to reach \$240.45 billion by 2028 before climbing steadily toward the \$326.77 billion endpoint in 2035.

Segment Analysis by Machine Type

Road rollers command the largest share of the market by machine type, accounting for roughly 28% of global revenue in 2025. These machines are indispensable for both new construction compaction and asphalt overlay rehabilitation. Tandem vibratory rollers and pneumatic-tire models dominate highway applications, while technological upgrades such as oscillation compaction and intelligent compaction measurement values are enabling fewer passes per lift, improving fuel efficiency and project throughput.

Motor graders are experiencing above-average growth, forecast to expand at a 4.9% CAGR through 2035. Rising demand for precision grading in both rural road programs and urban arterial rehabilitation is driving this segment. Emerging markets, where unpaved road networks still constitute over 60% of total road length, represent a particularly fertile demand base for grader deployments.

Wheel loaders generated an estimated \$42.6 billion in 2025, supported by versatile deployment across material handling, snow removal, and roadbed preparation. [Concrete mixers](#) captured approximately 16% of the market, serving bridge deck pours and rigid pavement construction. Other specialty equipment, including cold planers and chip spreaders, rounds out the machine type landscape, growing at a 4.2% CAGR.

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Segment Analysis by Application

Road construction projects represent the dominant application segment, holding approximately 45% of market share in 2025. This is anchored by massive greenfield programs in China, India, and the Middle East. However, road repair and rehabilitation is the fastest-growing application, projected to expand at a 5.2% CAGR. This reflects the reality that over 45% of U.S. roads are rated

in poor or mediocre condition by the American Society of Civil Engineers, and over 40% of Europe's primary road network was built before 1980, driving cyclical refurbishment demand in mature economies.

Bridge and tunnel maintenance contributed approximately \$25.30 billion in 2025, supported by structural rehabilitation mandates. Other applications, including airport runways and port access roads, captured roughly 8% of the market.

Segment Analysis by End User

Government and public sector agencies remain the dominant end users, accounting for approximately 52% of market share. These entities directly procure equipment or specify requirements in turnkey contracts funded by sovereign highway budgets. Private contractors are gaining share as public-private partnership models proliferate, expanding at a 4.8% CAGR. These concession models shift lifecycle maintenance obligations, and therefore equipment purchasing decisions, from public agencies to private operators. Other end users, including mining, agriculture, and industrial site road operators, contributed approximately \$14.76 billion in 2025.

Regional Landscape: Asia-Pacific Leads, All Regions Grow

Asia-Pacific dominates the road maintenance market with approximately 42% of global revenue in 2025 and the fastest regional CAGR at 5.1%. China alone captures roughly 45% of the regional share, with the 14th Five-Year Plan allocating over \$450 billion to transport infrastructure through 2025 and expressway targets extending to 185,000 kilometers by 2035. India is growing at a 6.2% CAGR, with the Ministry of Road Transport and Highways constructing 10,660 kilometers of highways in fiscal year 2024–25 and sustaining a pace of 28 kilometers per day through Bharatmala Phase II, which covers an additional 25,000 kilometers of economic corridors. India's Pradhan Mantri Gram Sadak Yojana has sanctioned 838,611 kilometers of rural roads as of August 2025, creating sustained demand for machinery in historically underserved regions. Japan contributed approximately \$9.45 billion, focused on expressway renewal under NEXCO. South Korea holds roughly 7% of the regional share through smart highway pilot projects. The ASEAN bloc is expanding at a 5.8% CAGR through ASEAN Highway Network expansion.

Europe holds the second-largest global share at approximately 25%, driven by the EU Cohesion Fund and the pressing need to rehabilitate aging road infrastructure. Germany captures roughly 22% of the regional share through its Autobahn modernization program. The United Kingdom is growing at a 3.6% CAGR under Road Investment Strategy 3. France contributed approximately \$7.84 billion through Grand Plan d'Investissement allocations. Italy holds roughly 11% of the regional share through PNRR recovery fund road spending. Spain is expanding at 3.9% through Mediterranean corridor upgrades. The Nordic countries contributed approximately \$4.18 billion, focusing on climate-resilient road surface research and development. Russia holds roughly 8% of

the regional share through federal road modernization targets. The European Commission's Trans-European Transport Network revision mandates completion of a core network by 2030, channeling approximately EUR 30 billion into cross-border road corridors.

North America contributed approximately \$42.2 billion in 2025, representing roughly 20% of global revenue. The United States dominates with approximately 75% of the regional share, benefiting from the Infrastructure Investment and Jobs Act, which authorized approximately \$379.3 billion for highway funding over five years, with \$43.3 billion specifically designated for bridge investment and maintenance. Canada is growing at a 3.8% CAGR through the National Trade Corridors Fund and the Investing in Canada Infrastructure Program, which provides CAD 33 billion for public transit and trade corridors. Mexico contributed approximately \$3.15 billion, driven by Tren Maya and Interoceánico corridor projects under the National Infrastructure Plan 2024–2030.

South America was valued at approximately \$14.76 billion in 2025. Brazil dominates with roughly 55% of the regional share through its active public-private partnership concession pipeline, which has attracted over \$18 billion in private investment commitments for highway operation and maintenance since 2020. Argentina is growing at a 4.3% CAGR through its Ruta Nacional rehabilitation program, supported by World Bank lending targeting 5,800 kilometers of national route rehabilitation through 2028.

The Middle East and Africa region presents the highest long-term growth trajectory, expanding at a 5.3% CAGR. Saudi Arabia leads with approximately 30% of the regional share through Vision 2030 transport mega-projects encompassing over 15,000 kilometers of new and upgraded roads. The United Arab Emirates is growing at a 4.7% CAGR through Expo legacy road network expansion. South Africa contributed approximately \$1.92 billion through SANRAL maintenance backlog programs. Egypt holds roughly 15% of the regional share through New Administrative Capital road network development. The broader region benefits from African Development Bank corridor financing and the Trans-African Highway program, which targets paved connectivity across 54,120 kilometers spanning nine corridors.

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Competitive Landscape

The road maintenance market exhibits medium concentration, with the top five players collectively holding an estimated 35–40% of global revenue. Fragmentation increases at the regional and local levels, where domestic manufacturers in China, India, and Turkey compete aggressively on price. Strategic differentiation is migrating from product specifications toward digital services, fleet management platforms, and total-cost-of-ownership financing packages.

Caterpillar Inc. leads with an estimated 8–11% revenue share, offering a global full-line portfolio

of motor graders, wheel loaders, compactors, and Cat Connect telematics. Volvo Construction Equipment captures roughly 6–9% as an electrification pioneer with strong European positioning, offering road rollers, pavers, and connected fleet solutions. BOMAG, part of the Fayat Group, holds approximately 4–6% as a compaction specialist with research and development leadership in compaction equipment, cold planers, and stabilizers.

The Wirtgen Group, under John Deere, accounts for roughly 5–8% through integrated road rehabilitation systems including cold milling machines, road reclaimers, and slipform pavers. Komatsu Ltd. holds approximately 5–7% through motor graders, wheel loaders, and KOMTRAX telematics, positioning itself as an autonomous technology leader. SANY Group captures roughly 4–6% with cost-competitive road rollers, concrete mixers, and motor graders, expanding globally from its Chinese base. XCMG holds approximately 3–5% through graders, loaders, and rollers with an aggressive international growth strategy. CNH Industrial under the CASE brand captures roughly 3–5% through a strong dealer network in the Americas. The Ammann Group holds approximately 2–4% with a niche focus on compaction and asphalt mixing plants. Liebherr captures roughly 2–4% through premium positioning in wheel loaders, concrete technology, and mobile cranes.

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Recent strategic developments include AECOM being awarded a contract in June 2026 to provide program management and digital engineering services for major highway infrastructure expansion and maintenance projects. In May 2026, Vinci SA launched an initiative to integrate automated, AI-driven road inspection systems across its motorway networks. In April 2026, Granite Construction entered a strategic partnership with advanced material suppliers to deploy sustainable, self-healing concrete technologies for high-stress road pavement and structural repairs.

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