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Global Rough Terrain Crane Market Research Report- Forecast 2032

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Description:

Global Rough Terrain Crane Market Overview

Rough Terrain Crane Market Size was valued at USD 14.17 Billion in 2023. The rough terrain crane market industry is projected to grow from USD 15.48 Billion in 2024 to USD 21.501 Billion by 2032, exhibiting a compound annual growth rate (CAGR) of 4.19% during the forecast period (2024 - 2032). A number of market drivers, such as construction activities, infrastructure development, technical breakthroughs, and industry-specific requirements, drive the rough terrain crane market. The market is quite cutthroat, with major competitors concentrating on product innovation and extending their product lines. It is also becoming more common for crane manufacturers and rental businesses to work together, giving them access to a larger clientele.

Rough Terrain Crane Market Overview

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Rough Terrain Crane Market Trends

Increased popularity of large-capacity cranes is driving the market growth

One of the important market trends for rough-terrain cranes that is anticipated to have a favorable effect on the sector in the coming years is the popularity of large-capacity cranes. These cranes are best used in situations when massive modular components need to be lifted and moved. Manitowoc and Tadano, among other manufacturing suppliers, provide rough-terrain cranes with capabilities greater than 120 tonnes. Vendors are now selling light equipment that is portable and capable of lifting high loads thanks to advancements in body design. Due to the fact that these cranes cover all the lift capacity of other types of cranes without incurring additional costs, end users are investing in them. High-capacity rough-terrain cranes are becoming more and more popular, which will boost market CAGR in the years to come.

The expansion of utility infrastructure in both developed and developing economies around the globe is anticipated to fuel market expansion. The expansion of the transportation industry and the rising number of building projects that go along with them are what's fueling the market. Due to their compact design compared to conventional cranes, these cranes are also used in heavy lifting tasks in confined places. Over the course of the projected period, the market growth is anticipated to be driven by rising government expenditure in utility and power transmission projects. Rough-terrain crane demand for rental basis enterprises is predicted to increase in response to the growing trend of crane services offered on a rental basis in various emerging nations. A rise in the market need for lifting large goods and performing loading and unloading operations has been caused by the construction of tall structures and contemporary infrastructure. The mining industry's rising need for rough-terrain cranes is the market's driving force.

The rapid expansion of utility infrastructure in the US and Western Europe is one of the major reasons propelling the growth of the rough-terrain crane market ly. For instance, in Europe, the installation of wind energy is widespread in nations like the Netherlands, Belgium, and Austria. The Netherlands added approximately 1.5 GW of new offshore wind grid-connected capacity in 2020, followed by Belgium with a 706 MW installation, according to the Wind Energy Council (GWEC). The Austrian government also plans to expand green power production from its present level of 54 TWh to 81 TWh by 2030 in order to meet the target of 100% green electricity generation. Due to their maneuverability and effectiveness in small spaces and challenging settings, these projects will increase the demand for rough-terrain cranes, which will in turn fuel market expansion over the projection period.

Over the course of the projected period, the market is anticipated to experience profitable growth due to the increasing desire for rough-terrain cranes in installation and maintenance tasks across numerous sectors. Moreover, throughout the projected period, increased availability and awareness of rough-terrain cranes with cutting-edge technology and increased capacity are anticipated to open up new market opportunities. Thus, driving the rough terrain crane market revenue.

Rough Terrain Crane Market Segment Insights

## Rough Terrain Crane Application Insights

The rough terrain crane market segmentation, based on application includes Construction, Utilities and Others. The construction segment dominated the market. Over the projected period, increasing demand for a rough-terrain crane for maintenance and installation in the construction industry is anticipated to propel the segment's expansion. Urbanization and a growing population are driving the construction industry, which is likely to drive segment growth throughout the forecast period. Modern infrastructure developments in the mobility and transportation industry are increasingly necessary due to the growing demand for environmentally friendly transportation. Furthermore, rising government investment in infrastructure development projects is also anticipated to promote sector expansion.

**Figure 1: Rough Terrain Crane Market, by Application, 2022 & 2032 (USD Billion)**

Rough Terrain Crane Market, by Application, 2022 & 2032

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

## Rough Terrain Crane Capacity Insights

The rough terrain crane market segmentation, based on capacity, includes Upto 25 T, 26 T - 74 T, 75 T-100 T and Above 101 T. The 75 T-100 T category generated the most income. Rough-terrain cranes with a capacity of 75 to 100 tonnes can handle nearly all of the primary lifting jobs. Due to its increased performance in off-road and on-road applications and projects, this line is highly favored and adaptable in a variety of industries. Over the projected period, increasing demand for high capacity construction equipment in a variety of infrastructure projects is anticipated to propel sector expansion. Strong demand for this range in a variety of heavy-duty lifting applications is the driving cause behind the segment's above-predicted growth.

## Rough Terrain Crane Regional Insights

By region, the study provides the market insights into North America, Europe, Asia-Pacific and Rest of the World. The North American rough terrain crane market area will dominate this market. The development of the rough-terrain crane market in North America throughout the projected period will be aided by the rapid expansion of key end-user sectors including construction, oil and gas, and utilities in nations like the US. The region's market growth is also being supported by the rising demand for infrastructure renovation and repair. One of the factors driving market expansion during the projection period is industrialization. The market is being supported by government initiatives to offer advantageous policies for commercial housing and development, which is raising demand for rough-terrain cranes.

Further, the major countries studied in the market report are The US, Canada, German, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

**Figure 2: ROUGH TERRAIN CRANE MARKET SHARE BY REGION 2022 (USD Billion)**

ROUGH TERRAIN CRANE MARKET SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe rough terrain crane market accounts for the second-largest market share. The region's construction equipment industry is expanding as a result of rising demand. The expansion of the regional market is anticipated to be fueled by an increasing number of infrastructure and building projects being carried out by European nations. A market-supporting aspect is the demand for new electric vehicle charging infrastructure in European nations like Germany and the UK. Another element boosting the market is the existence of major businesses in the area. Further, the German rough terrain crane market held the largest market share, and the UK rough terrain crane market was the fastest growing market in the European region

The Asia-Pacific Rough terrain crane Market is expected to grow at the fastest CAGR from 2023 to 2032. Over the projection period, rising construction activity in APAC's growing economies, including India, China, Japan, and South Korea, are anticipated to fuel market expansion. The demand for modern infrastructure has been spurred by growing urbanization and rising disposable income, which has positively impacted the region's building sector. The rising population in these developing nations is fuelling the need for utilities and accelerating industry expansion. Moreover, China's rough terrain crane market held the largest market share, and the Indian rough terrain crane market was the fastest growing market in the Asia-Pacific region.

## Rough terrain crane Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development in order to expand their product lines, which will help the rough terrain crane market, grow even more. Market participants are also undertaking a variety of strategic activities to expand their footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. To expand and survive in a more competitive and rising market climate, rough terrain crane industry must offer cost-effective items.

Manufacturing locally to minimize operational costs is one of the key business tactics used by manufacturers in the rough terrain crane industry to benefit clients and increase the market sector. In recent years, the rough terrain crane industry has offered some of the most significant advantages to market. Major players in the rough terrain crane market attempting to increase market demand by investing in research and development operations include Liebherr Group (Switzerland), The Manitowoc Company, Inc. (U.S.), Terex Corporation (U.S.), Tadano Ltd. (Japan), Xuzhou Construction Machinery Group Co., Ltd. (China), KATO WORKS CO., LTD (Japan), TIL Limited (India.), ENTREC Corporation (Canada), Manitex International Inc. (U.S.), SANY GROUP (China), Broderson Manufacturing Corp. (U.S.), and Maxim Crane Works, L.P. (U.S.).

With its primary manufacturing facilities and origins in Germany, Liebherr is a German-Swiss multinational equipment manufacturer with headquarters in Bulle, Switzerland. There are more than 130 firms that make up Liebherr, and they are divided into 11 different categories: earthmoving, mining, mobile cranes, tower cranes, maritime cranes, concrete technology, aircraft and transportation systems, machine tools and automation systems, home appliances, and components. With almost 42,000 employees worldwide, it generated nine billion euros in revenue in 2017. It was the largest crane firm in the world in 2007.

Manufacturing lifting and material processing equipment is what Terex Corp (Terex) does. Its product line comprises aerial work platforms, cranes, material handlers, concrete goods, industrial cranes, backhoes and dumpers, port

solutions, aerial devices, digger derricks, and auger tools. The primary brands of the corporation are Terex, Genie, EvoQuip, Fuchs, Powerscreen, Canica, Cedarapids, CBI, Simplicity, Franna, Terex MPS, Terex Washing Systems, Terex Jaques, Terex Conveying Systems, Terex Finlay, Terex Advance, Terex Bid-Well, and ProStacktm. building, maintenance, Infrastructure, manufacturing, shipping, transportation, energy, utilities, quarrying, and mining are just a few of the many industries that Terex supports.

## Key Companies in the rough terrain crane market include

- Liebherr Group (Switzerland)
- The Manitowoc Company, Inc. (U.S.)
- Terex Corporation (U.S.)
- Tadano Ltd. (Japan)
- Xuzhou Construction Machinery Group Co., Ltd. (China)
- KATO WORKS CO., LTD (Japan)
- TIL Limited (India.)
- ENTREC Corporation (Canada)
- Manitex International Inc. (U.S.)
- SANY GROUP (China)
- Broderson Manufacturing Corp. (U.S.)
- Maxim Crane Works, L.P. (U.S.)

## Rough Terrain Crane Industry Developments

**September 2022:** With a new location in the United Arab Emirates, Thunder Cranes, a famous supplier of offshore, modular, and portable rental cranes, announced the resumption of its Middle Eastern activities.

**December 2020:** Eight new versions of wire rope hoists, with capacities ranging from 3.2 tonnes to 40 tonnes, were introduced by Dubai Cranes & Technical Services LLC. These are mostly made for Middle Eastern businesses.

**June 2018:** A major manufacturer of rough terrain cranes, Manitowoc, recently announced the Grove GRT9165, a new range of rough terrain cranes with a wealth of capabilities and an affordable lifetime cost.

**January 2018:** Equipment Depot has been named as the primary distribution partner for SANY America Heavy Port Machinery in the American market for heavy duty equipment.

## Rough Terrain Crane Market Segmentation

### Rough Terrain Crane Application Outlook (USD Billion, 2018-2032)

- Construction
- Utilities
- Others

### Rough Terrain Crane Capacity Outlook (USD Billion, 2018-2032)

- Upto 25 T
- 26 T - 74 T
- 75 T-100 T
- Above 101 T

### Rough Terrain Crane Regional Outlook (USD Billion, 2018-2032)

- North America
  - US
  - Canada
- Europe

- Germany
- France
- UK
- Italy
- Spain
- Rest of Europe

- Asia-Pacific
  - China
  - Japan
  - India
  - Australia
  - South Korea
  - Australia
  - Rest of Asia-Pacific

- Rest of the World
  - Middle East
  - Africa
  - Latin America

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