



360iResearch

Hybrid Excavators Market

Global Forecast 2026-2032

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1. Preface

1.1. Objectives of the Study

- Which complete-machine offerings are commercially documented within the accepted Hybrid Technology and Undercarriage categories, and how do marketed, announced and demonstration-stage offerings differ by jurisdiction and period?
- Which Application and Operating Weight requirements govern buyer qualification across the included Buyer Industry categories, and what must a supplier substantiate before an offering is eligible for procurement?
- What do documented ownership, maintenance, warranty, energy-access and asset-retention conditions imply for a buyer choosing a hybrid excavator rather than retaining an existing machine or selecting a nonhybrid alternative?
- How do Manufacturer Direct Sales and Independent Dealer and Distributor Sales differ in contractual access, territorial coverage, support responsibilities and switching consequences for the buyer?
- Which jurisdiction-specific regulatory, public-procurement and product-qualification conditions affect the ability to offer or purchase an included hybrid excavator, and which obligations remain with the manufacturer, channel or buyer?
- Which documented supplier, licensing and component-integration relationships support a complete-machine offering, and where does an upstream capability stop short of commercial responsibility for the excavator?
- Which competitive claims and substitution choices are supported by offering-specific facts, and what commercial conditions must be verified before an entry, partnership or procurement commitment?

1.2. Market Definition

The Global Hybrid Excavators market concerns complete excavators with a hybrid power or energy-management architecture. The accepted technology scope includes Electric Hybrids, Hydraulic Hybrids, Mechanical Hybrids and Multi-Domain Hybrids, across Crawler Excavators, Wheeled Excavators and Walking Excavators. The studied offering is the finished excavator rather than a stand-alone hybrid-system component.

The commercial boundary connects manufacturers and independent dealers or distributors with the purchasing organizations represented by the accepted Buyer Industry categories. Equipment Rental & Leasing is included as a buyer industry. Application identifies the equipment's task, rather than changing the identity of the purchasing organization or creating an additional finished-machine offering.

Stand-alone batteries, supercapacitors, hydraulic or mechanical components, attachments and support services provide upstream or associated context rather than separately studied excavator products. Rental services and downstream construction, extraction or processing activities are not reclassified as excavator offerings. Conventional nonhybrid machines and

fully battery-electric machines without a hybrid architecture may inform substitution analysis but remain outside the defined offering. The geographic boundary is Global.

1.3. Market Segmentation & Coverage

Undercarriage distinguishes Crawler Excavators, Wheeled Excavators and Walking Excavators. Hybrid Technology distinguishes Electric Hybrids, Hydraulic Hybrids, Mechanical Hybrids and Multi-Domain Hybrids; Electric Hybrids includes Battery Hybrids, Supercapacitor Hybrids and Battery-Supercapacitor Hybrids. These lenses separate machine configuration from hybrid architecture rather than treating them as interchangeable labels.

Application covers Excavation & Grading; Material Handling & Processing; Demolition & Deconstruction; Drilling & Ground Improvement; and Vegetation Management. This lens organizes the tasks against which equipment suitability and purchasing requirements are examined.

Buyer Industry covers Construction; Mining, Quarrying & Oil & Gas Extraction; Waste Management & Remediation; Equipment Rental & Leasing; Agriculture, Forestry & Fishing; Utilities; Manufacturing; Transportation & Storage; Landscaping Services; and Public Administration & Defense. It identifies the purchasing organization's business context, which remains distinct from the machine's application.

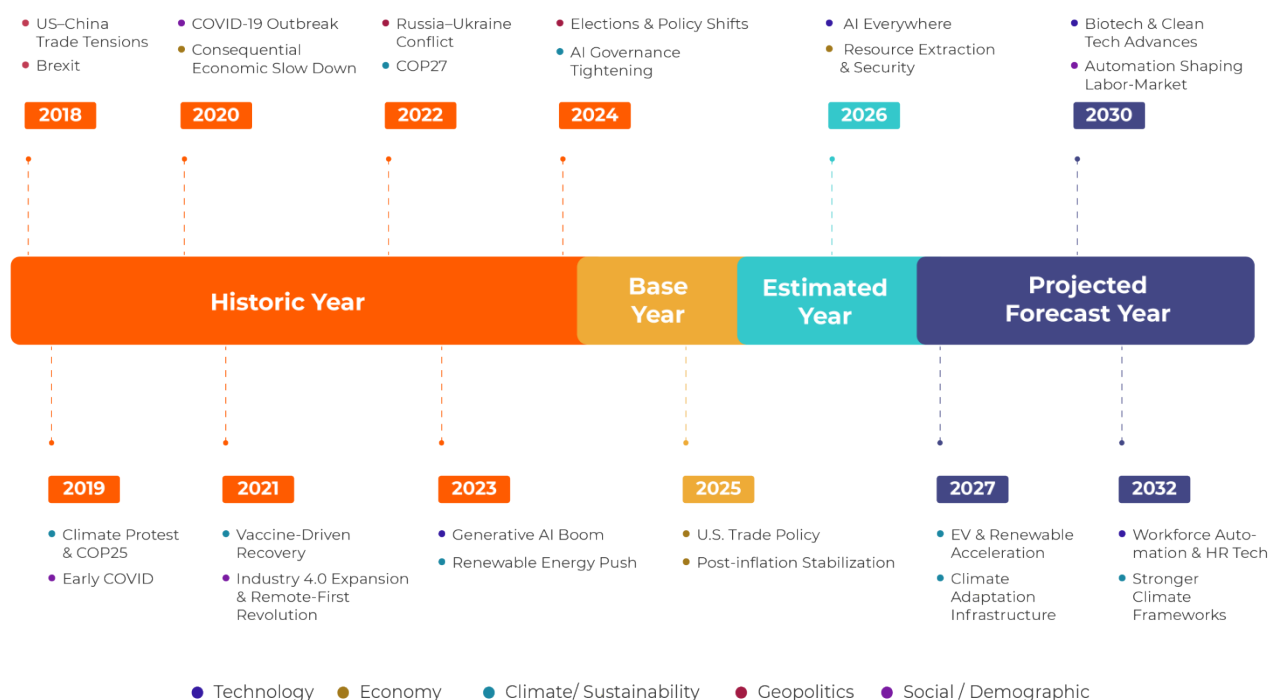
Sales Channel distinguishes Manufacturer Direct Sales from Independent Dealer and Distributor Sales, focusing attention on the contracting and support relationship. Operating Weight covers Below xx.xx Metric Tons; xx.xx to Less Than xx.xx Metric Tons; xx.xx to Less Than xx.xx Metric Tons; and xx.xx Metric Tons and Above. All axes apply within the Global market and describe different views of the same studied population, not additive markets.

Table 1. Global Hybrid Excavators Market Segmentation & Coverage

Segmentation	Coverage
Application	• Material Handling & Processing • Excavation & Grading • Demolition & Deconstruction • Drilling & Ground Improvement • Vegetation Management
Buyer Industry	• Waste Management & Remediation • Transportation & Storage • Construction • Manufacturing • Equipment Rental & Leasing • Mining, Quarrying & Oil & Gas Extraction • Agriculture, Forestry & Fishing • Utilities • Public Administration & Defense • Landscaping Services
Hybrid Technology	• Hydraulic Hybrids • Electric Hybrids ◦ Battery Hybrids ◦ Supercapacitor Hybrids ◦ Battery-Supercapacitor Hybrids • Mechanical Hybrids • Multi-Domain Hybrids
Operating Weight	• xx.xx Metric Tons and Above • xx.xx to Less Than xx.xx Metric Tons • xx.xx to Less Than xx.xx Metric Tons • Below xx.xx Metric Tons
Sales Channel	• Independent Dealer and Distributor Sales • Manufacturer Direct Sales
Undercarriage	• Crawler Excavators • Wheeled Excavators • Walking Excavators

1.4. Years Considered for the Study

The study covers 2024-2032, with 2024 as the historical reference year, 2025 as the base year, 2026 as the estimated year, and 2032 as the endpoint of the forecast horizon.

Figure 1. Global Hybrid Excavators Market, Years Considered for the Study

1.5. Currency Considered for the Study

The reporting currency is the U.S. dollar (USD), with monetary values expressed on an absolute scale.

1.6. Language Considered for the Study

The study is published in U.S. English for business and investment decision-makers.

1.7. Key Stakeholders

- Complete-machine manufacturers and equipment brands evaluate hybrid portfolio choices, the categories they can substantiate commercially, and the territories in which they can support an offering.
- Equipment buyers across the included industries assess task fit, procurement eligibility and support obligations before replacing, retaining or changing their excavator fleets.
- Equipment Rental & Leasing businesses evaluate fleet suitability, customer access, maintenance responsibilities and asset-transfer risk when deciding which hybrid excavators to procure.
- Independent dealers and distributors evaluate product representation, territorial rights, service coverage and warranty allocation before committing to a manufacturer relationship.

- Hybrid-system component suppliers, technology owners and licensors assess supply and licensing relationships while distinguishing their contribution from responsibility for the finished excavator.
- Equipment financiers and asset owners assess enforceable warranties, maintenance obligations and transfer conditions that affect their exposure to a financed or leased machine.
- Regulators, standards bodies and public purchasing authorities influence product eligibility and procurement conditions; their decisions must be distinguished from evidence of actual purchasing access or adoption.
- Strategic investors and corporate development teams evaluate documented participation, commercial rights and delivery commitments before choosing an acquisition, partnership or market-entry proposition.

2. Research Methodology

2.1. Introduction

The study frames Hybrid Excavators as a finished-equipment business spanning the accepted machine configurations, hybrid architectures, applications, buyer industries, sales channels and operating-weight categories. Its purpose is to connect documented commercial participation and market-access conditions with decisions by equipment buyers, manufacturers, distribution partners and investors.

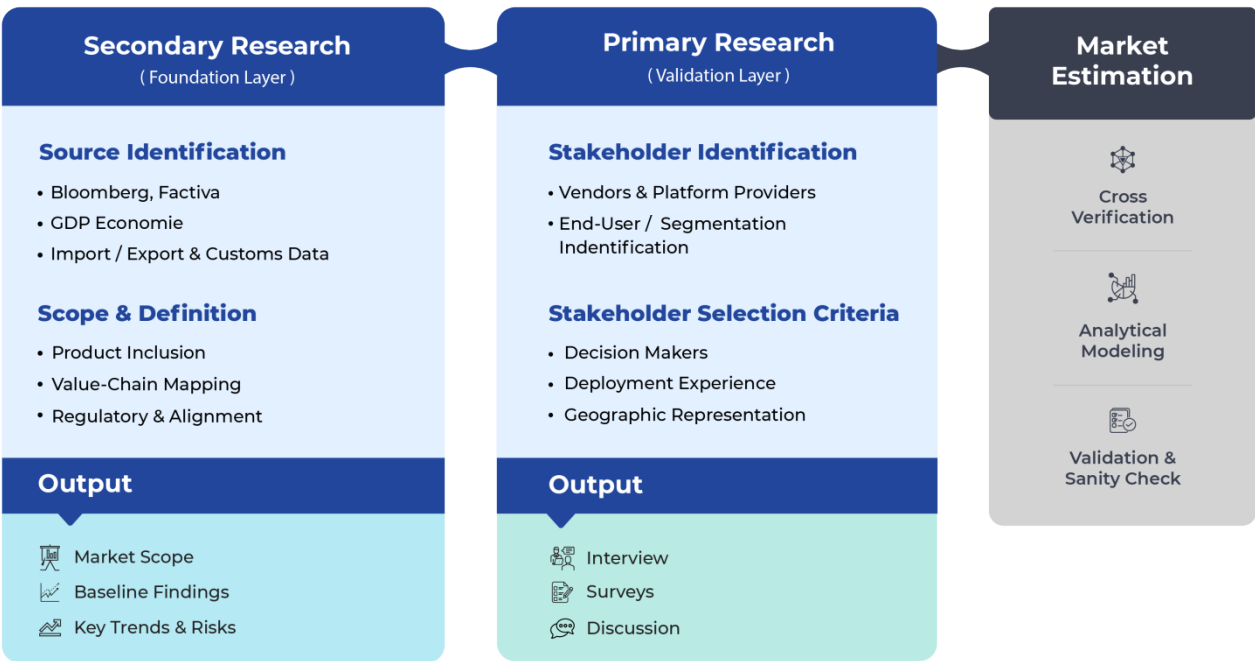
The analytical approach separates business observations from economic interpretation. Analyst-led primary research provides a qualitative challenge layer, while commercial claims and numerical conclusions require support appropriate to their respective scope.

2.2. Research Design

Research questions follow the accepted Hybrid Excavators hierarchy and distinguish the finished machine, its supplier, the purchasing organization and the commercial relationship connecting them. Offering identity, jurisdiction, effective period and commercial status establish the context in which a business claim can be interpreted.

Evidence of an advertised product, a legal authorization and a contractual distribution right supports different propositions. None alone establishes buyer adoption or a viable entry route. A commercial conclusion therefore requires support matched to the particular question rather than a collection of broadly relevant equipment references.

Figure 2. Global Hybrid Excavators Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

2.2.2. Secondary Research

Secondary evidence is interpreted according to what its originating authority can establish. Official company portfolios can support how a company describes its own excavators; filings can support disclosed ownership, licensing and business facts within their stated scope. Regulatory records can establish legal status, while public purchasing documents can establish requirements applying to a particular buyer or jurisdiction.

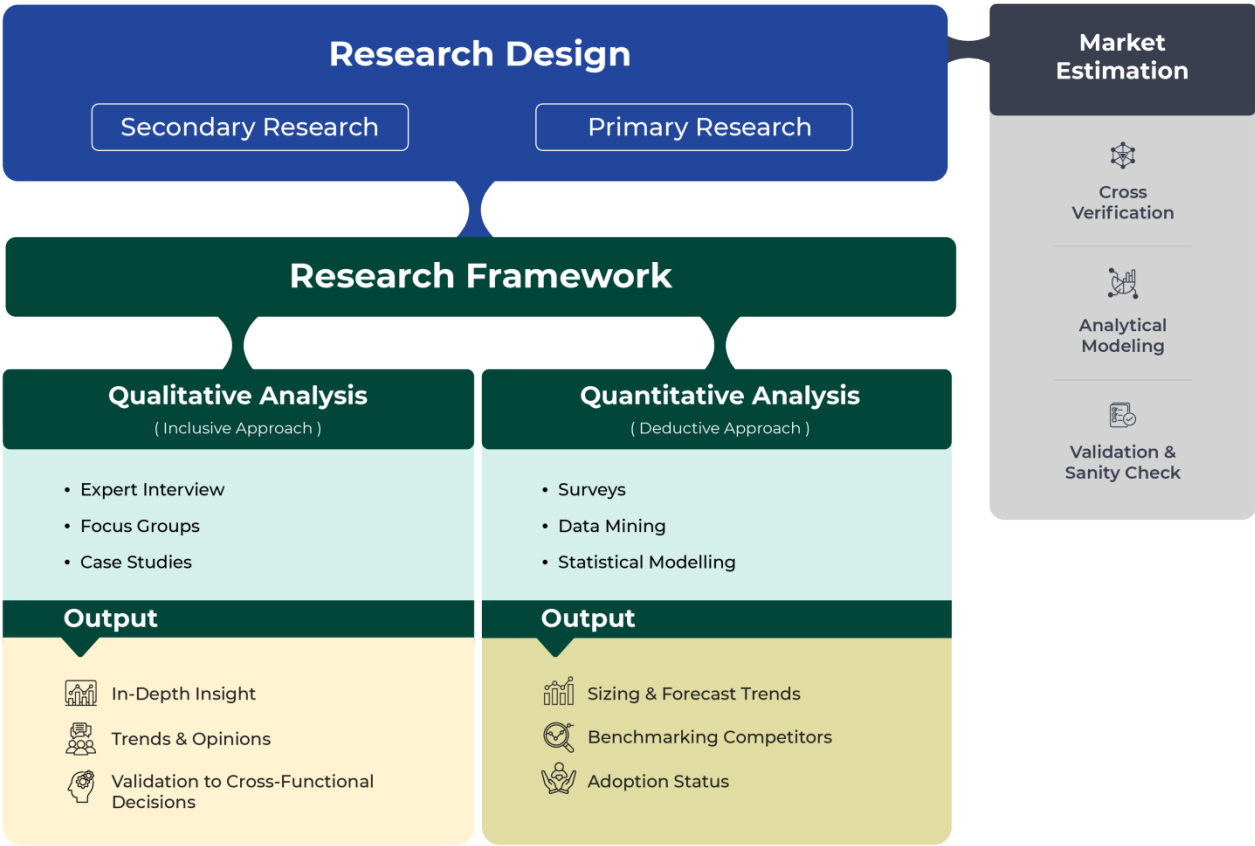
The authority, applicable period and product boundary of a source determine its usefulness. An undated portfolio page does not by itself establish continuing local availability, and a disclosure covering a wider construction-equipment business is not automatically a Hybrid Excavators fact. Repeated publication of the same underlying statement does not create independent corroboration.

2.3. Research Framework

The analytical framework connects the complete-machine definition and accepted taxonomy to supplier participation, buyer requirements, channel responsibilities and commercial choices. It separates evidence that a hybrid offering exists from evidence that a particular buyer can obtain, qualify and support it.

Competition is interpreted at the relevant offering and purchasing context rather than inferred from a company's wider equipment presence. Nonhybrid alternatives can inform a substitution decision without becoming part of the studied offering, while upstream technology participation remains distinct from responsibility for a finished excavator.

Figure 3. Global Hybrid Excavators Market, Research Framework



2.3.1. Qualitative Analysis

Qualitative analysis addresses buyer qualification, task suitability, switching obligations, service and warranty commitments, channel rights and the economic conditions surrounding equipment ownership. For Hybrid Excavators, the relevant question is not whether an architecture is technically distinctive, but whether its documented commercial proposition addresses a particular buyer's requirements.

Hybrid labeling is not treated as proof of lower ownership cost, easier procurement or superior suitability. Explanations of adoption or resistance remain conditional on the buyer's application, relevant energy-access requirements, maintenance responsibilities and available alternatives.

2.3.2. Quantitative Analysis

Quantitative interpretation is anchored to the Global boundary, the accepted finished-excavator definition and the designated study periods. Monetary reporting uses USD on an absolute scale. Comparisons require alignment of product coverage, geography, period and business boundary before observations can support a common interpretation.

Undercarriage, Hybrid Technology, Application, Buyer Industry, Sales Channel and Operating Weight describe the same market from different perspectives; they are not separate opportunities to add together. Observed business facts, estimates and forward-looking

interpretations must remain distinguishable, and qualitative explanations do not independently establish numerical conclusions.

2.4. Market Size Estimation

A monetary interpretation of the market must correspond to complete Hybrid Excavators rather than the total excavator business or a technology supplier's wider operations. It must retain the Global boundary, accepted categories and designated study-period roles.

Evidence of buyer interest, technical capability or purchasing eligibility cannot by itself establish a market-value conclusion. The support for an estimate must address the same offering and business boundary as the estimate, and a forecast derived from a qualitative assumption cannot independently validate that assumption.

2.4.1. Top-Down Approach

The top-down perspective concerns the relationship between Hybrid Excavators and broader excavator or construction-equipment business evidence. Such evidence is relevant to a hybrid-specific interpretation only where its product, geographic and period boundaries permit that distinction.

A broader business disclosure cannot be assigned to Hybrid Excavators simply because the organization also describes a hybrid model. Product publicity, regulatory eligibility and an assumed technology mix do not establish the hybrid-specific portion of a wider business; evidence that does not support that separation remains contextual.

2.4.2. Bottom-Up Approach

The bottom-up perspective concerns evidence attributable to named, in-scope finished-machine offerings and the entities commercially responsible for them. A component supplier's participation does not establish a complete excavator offering, and a manufacturer's portfolio listing does not establish access in every jurisdiction.

Product identity, commercial status, geographic applicability and the underlying business boundary must be clear before offering-level evidence can support a market-level interpretation. Manufacturer and dealer descriptions of the same model must not be interpreted as separate machine offerings solely because different entities describe them.

2.5. Data Triangulation

For Hybrid Excavators, corroboration requires agreement on the offering, jurisdiction, period and commercial proposition being assessed. Descriptions that agree on a model's identity may still leave a different question, such as territorial orderability or warranty responsibility, unsettled.

Apparent conflicts can arise from different product boundaries, commercial statuses or effective periods and should retain those distinctions. Qualitative interpretation can challenge a quantitative assumption, but consistency between the two does not turn the qualitative premise into independent numerical proof.

Figure 4. Global Hybrid Excavators Market, Data Triangulation

2.6. Research Outcomes

The intended decision support concerns which complete-machine offerings warrant commercial consideration, which buyer requirements constrain switching, and which channel, licensing or regulatory obligations govern access. Conclusions should distinguish documented participation from conditional entry propositions and explain how offering fit, support commitments and contractual responsibilities affect procurement or partnership choices. No technology category, buyer industry or geography is presumed to be commercially preferable merely because it is included in the study.

2.7. Research Assumptions

- A comparison of hybrid architectures assumes that the finished-machine offerings address sufficiently similar tasks, operating-weight classes and support obligations. Where these differ, the interpretation concerns buyer fit rather than technology superiority.
- A buyer-economics interpretation is conditional on the relevant duty pattern, energy-access requirements, maintenance responsibilities and asset-retention horizon. Hybrid classification alone is not assumed to create an economic advantage.
- Equipment Rental & Leasing identifies a procuring business, while Application identifies the machine's task. Rental-fleet acquisition and the subsequent user's activity are linked commercial relationships, not presumed independent equipment opportunities.
- Interpretations extending toward 2032 are conditional on the relevant product, licensing, channel and support arrangements remaining applicable. Changes to these

conditions can invalidate an earlier commercial comparison without changing the accepted study taxonomy.

2.8. Research Limitations

- An announced, demonstrated or listed hybrid excavator does not establish orderability or contractual support in a particular jurisdiction. Market-entry commitments require offering-specific confirmation of commercial status and obligations.
- Disclosures covering an entire construction-equipment business are not automatically attributable to Hybrid Excavators. Using them without a matching product boundary could misrepresent the supplier's participation or commercial exposure.
- Accepted category names standardize study coverage, not suppliers' terminology. A hybrid designation or weight label alone does not establish equivalence between models, and mixed descriptions can limit cross-offering comparisons.
- Project-specific purchasing rules, service terms and operating contexts constrain the transferability of buyer examples. Evidence concerning one contractor, rental fleet or public buyer does not establish the same switching barriers across all included buyer industries.

3. Executive Summary

3.1. Introduction

The Global Hybrid Excavators market is a selective finished-machine procurement proposition, not an inevitable bridge from conventional to fully electric equipment. Komatsu's U.S.-facing PC365LC-xx.xx electric-swing crawler and Volvo Construction Equipment's Australia-facing EC500 Hybrid hydraulic crawler illustrate differentiated offers; Volvo specifically positions its model for digging and dumping. Competitive relevance depends on a machine suited to the assignment and an applicable support commitment, rather than architecture alone.

Project access can override the efficiency case. Oslo requires emission-free work on municipal construction sites, so lower fuel use does not establish acceptance of diesel-dependent operation. Where combustion remains permitted, supported hybrid ownership can be assessed against eligible conventional machines, confirmed hire and task-matched electric alternatives. The decisive choice is which complete package can serve accepted work with accountable fulfillment; individual delivery and buyer outcomes remain offer-specific.

3.2. CXO Perspective

For owner-fleet CFOs and operating leaders, capital approval should follow identifiable recurring work and the obligations retained by the owner. Komatsu's transferable electric-swing component protection and Volvo's initial-owner frame, boom and arm protection transfer different risks; neither establishes whole-machine availability, a financial return or a resale outcome. Compare the applicable machine, funding, maintenance and coverage package with retention or confirmed project hire, and defer where assignment continuity or support is inadequate.

For OEMs and entrants, United Tractors' 2022 Indonesian HB365-xx.xx proposition illustrates distributor value through parts, mechanic and repair-time commitments. Select a channel only with OEM backing and obligations for the exact machine and territory. Producer-controlled contracting remains an alternative when it provides equivalent local accountability; delegation trades customer control for dependence on the partner's execution.

3.3. New Revenue Opportunities

The assessed opportunities are targeted crawler sales to owners with comparable continuing excavation or quarry work; project-specific hire for contractors avoiding a continuing ownership commitment; supported specialist handling packages for port and recycling buyers; and retention support for eligible Japanese Komatsu HB-series fleets. These are conditional account opportunities, not evidence of universal demand. Accepted assignments, an applicable machine or support offer and accountable fulfillment remain prerequisites; Japanese component support is not a worldwide entitlement. Opportunity Mapping details the corresponding qualification and alternatives.

3.4. Next-Generation Business Models

The supported model extends the machine sale through separately defined service and digital entitlements. Volvo presents service contracts and financial services with its hybrids, while its U.S. CareTrack offer distinguishes included Start functions from subscribed Advanced functions. This supports a machine-plus-services proposition, not an assumption that subscriptions or monitoring guarantee repairs. Buyers should confirm model eligibility, activation and contracted response obligations before treating the package as equivalent to broader support.

Project hire is a separate ownership-access model. Flannery lists the Komatsu HB365LC-xx.xx but specific models remain subject to availability. A rental owner therefore needs confirmed deployment and allocation of operating benefits and retained service costs; United Rentals' wider-business disclosure illustrates why those interests can differ, without establishing hybrid-specific terms. Hire limits the contractor's asset commitment but leaves allocation with the fleet. Deferral is preferable to a deployment promise unsupported by an assigned machine.

3.5. Industry Roadmap

For 2026-2027, turn new-generation portfolio announcements into dated regional orders, confirming the quoted model and conformity responsibility. EU Machinery Regulation 2023/xx.xx applies mandatorily from January xx.xx 2027; an earlier quotation does not establish compliance for later market placement. For 2028-2030 renewal, London's published NRMM guide schedules Stage V as the minimum from January xx.xx 2030 for covered machinery. Neither milestone mandates hybrids: fleets should verify continuing assignment eligibility and retain executable alternatives.

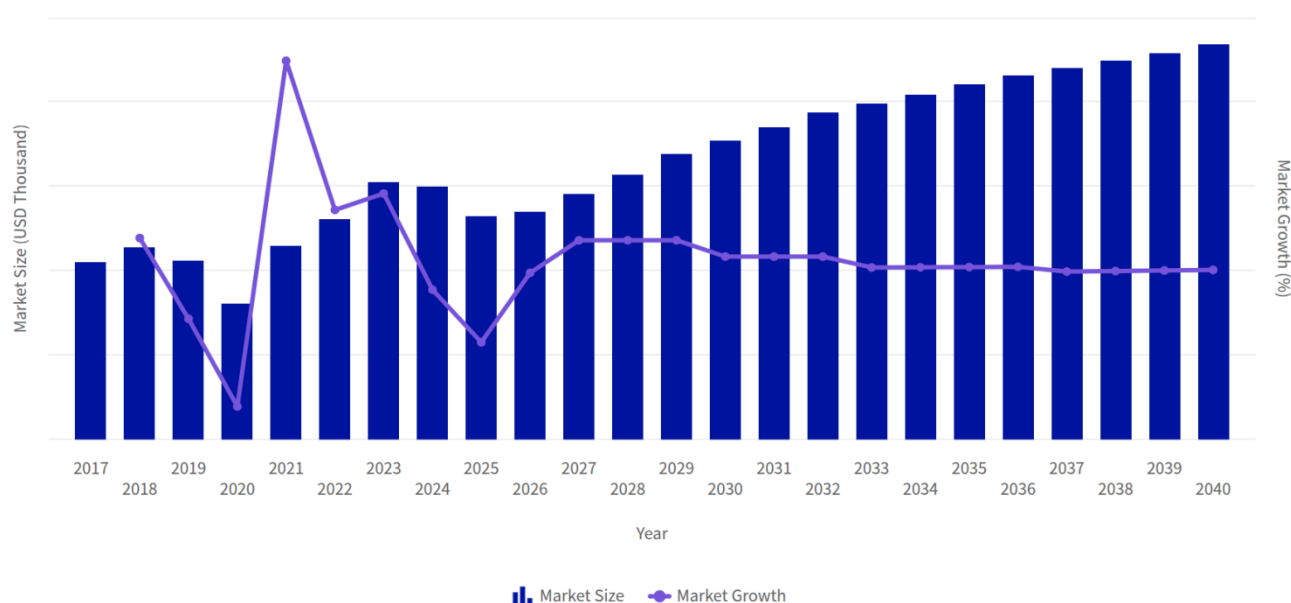
For 2031-2032, retention remains conditional on model-specific component support and accepted work, not an assumed winning architecture. Komatsu's disclosed Japanese hybrid-component remanufacturing activity is a bounded precedent, not a future or worldwide entitlement. SENNEBOGEN's xx.xx E Hybrid offers electric as well as diesel primary drive, demonstrating why energy recovery and combustion dependence must remain separate purchasing characteristics. Reopen the shortlist when project clauses, applicable support or a comparable electric package with accountable energy provision change. The 2023 Turner Construction pilot with Sunbelt Rentals illustrates such an energy-support relationship, not universal availability.

4.1. Introduction

.....

[illegible]

Figure 5. Global Hybrid Excavators Market Size, 2017-2040 (USD Thousand, Growth %)



Metric	2017	2024	2025	2026	2027	2032	2040
Market Size (USD Thousand)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Market Growth (%)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

4.2. Key Growth Contribution

Recurring suitable work can connect a hybrid's operating-efficiency proposition to an equipment owner's purchasing budget. Volvo positions the EC500 Hybrid for digging and dumping, and Fulton Hogan's quarry deliveries corroborate a bounded commercial application. Serving that need requires an eligible complete machine and accountable hybrid-component support, not the technology label alone. The adoption mechanism weakens when assignments are intermittent, benefits accrue to a different party or project conditions exclude combustion-dependent operation, as Oslo's emission-free requirement illustrates.

Figure 6. Global Hybrid Excavators Market, Key Growth Contribution, by Region, 2025-2032 (USD Thousand)

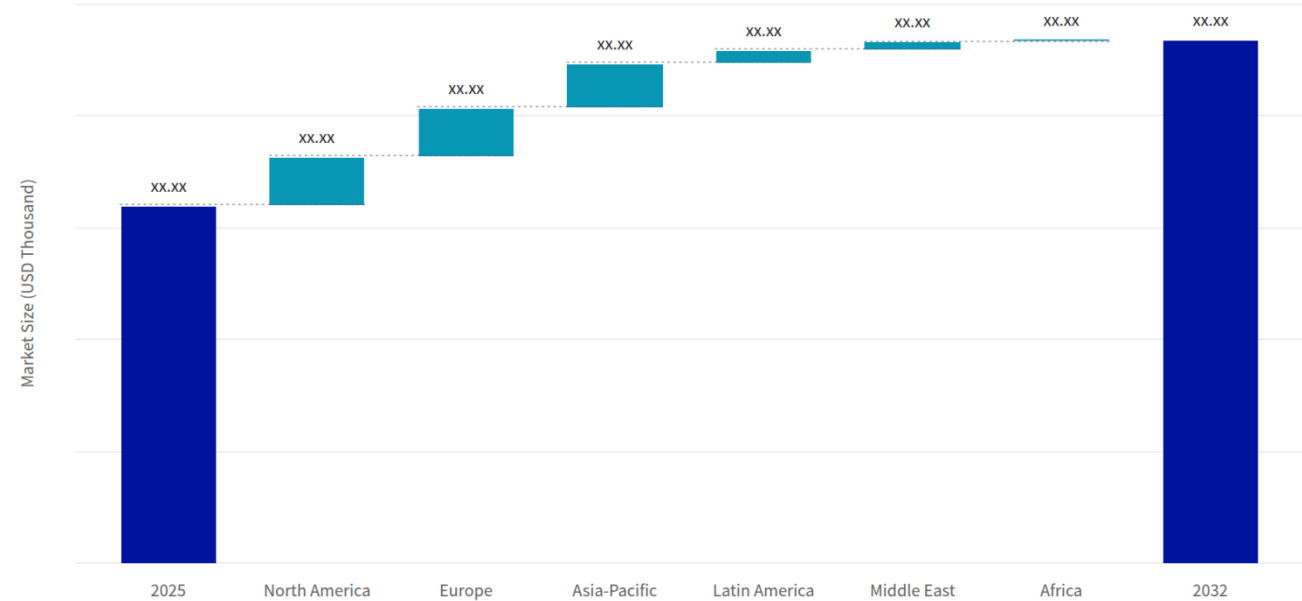


Figure 7. Global Hybrid Excavators Market, Key Growth Contribution, by Country, 2025-2032 (CAGR %)

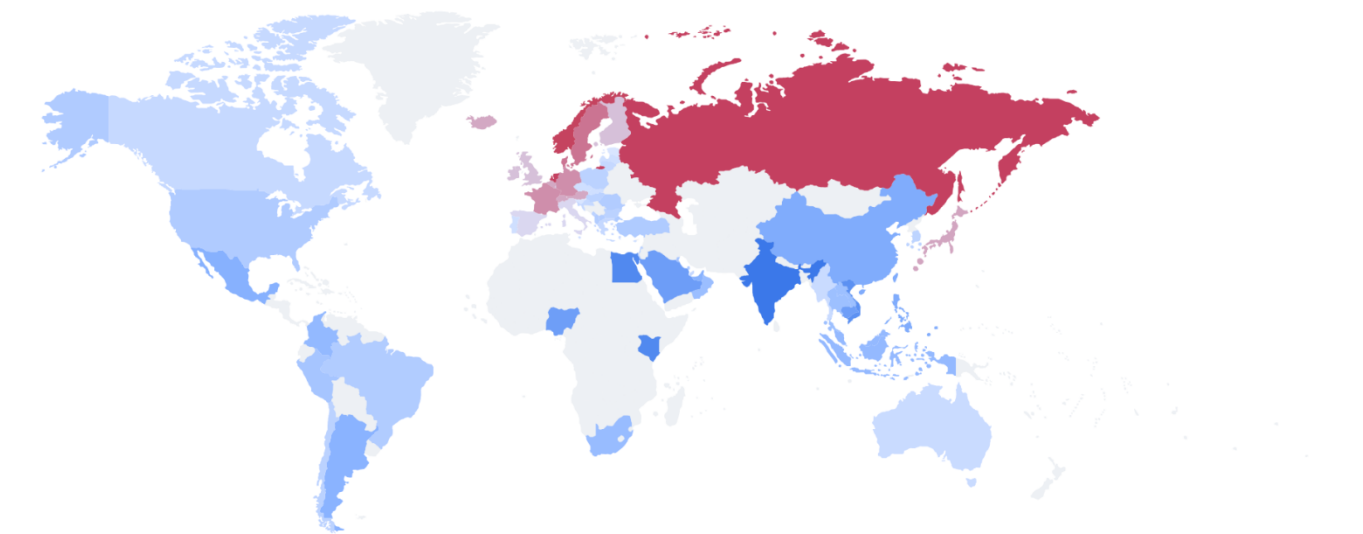


Table 3. Global Hybrid Excavators Market, Key Growth Contribution, 2025-2032

Scope	Leading Category	Added Market Size (USD Thousand)	Growth Share (%)	CAGR (%)
Application	xx.xx	xx.xx	xx.xx	xx.xx
Buyer Industry	xx.xx	xx.xx	xx.xx	xx.xx
Country	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid Technology	xx.xx	xx.xx	xx.xx	xx.xx
Operating Weight	xx.xx	xx.xx	xx.xx	xx.xx
Region	xx.xx	xx.xx	xx.xx	xx.xx
Sales Channel	xx.xx	xx.xx	xx.xx	xx.xx
Undercarriage	xx.xx	xx.xx	xx.xx	xx.xx

4.3. Industry Ecosystem & Value Chain Analysis

.....
.....
..... This gives the OEM and its support channel control over important ownership obligations; buying a stand-alone energy-storage component is not equivalent to obtaining a supported hybrid excavator. The commercial bottleneck is the enforceable machine-and-support commitment, not the mere presence of an upstream component supplier.

Regional distribution can add a distinct service commitment.
.....

A contractor can therefore seek project access through a rental fleet instead of ownership, but a listing is not a reservation. The fleet owner retains the acquisition decision and must align its support and deployment commitments with the customer's project.

Kobelco's historical battery-hybrid introduction adds another documented architecture, but does not establish a current substitute in a particular region. Component-category membership therefore cannot establish a finished-machine supplier's capability or delivery commitment.

Demand is clearest where the purchaser can connect a machine to identifiable work and an accountable beneficiary. Flannery's documented 2018 purchase of Komatsu HB215LC-xx.xx hybrids establishes a rental-fleet acquisition example, rather than merely an OEM product announcement.

For a contractor retaining its own excavator, a purchase decision can connect operating expense, machine suitability and asset ownership within the same organization. For an Equipment Rental & Leasing buyer, the machine must also match customer assignments and contractual responsibilities.

[illegible]

4.4.13 Broader named portfolios improve the possibility of task fit

Volvo's December 2024 introduction of the EC260 Hybrid, EC300 Hybrid, EC370 Hybrid, EC400 Hybrid and EC500 Hybrid broadened its named crawler portfolio. ■■■■

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4.4.3 Key Constraints

4.4.21 Emission free procurement can exclude the diesel reliant

[illegible]

4.4.2.2 Uncertain work allocation limits the ownership case

Volvo's commercial explanation links the hydraulic hybrid proposition to intensive digging and dumping. That does not establish equivalent economic value for intermittent assignments or materially different tasks. ■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■ ■■

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Flannery's model-availability condition adds a separate need to confirm deployment before promising a customer a specific hybrid.

4.5. Porter’s Five Forces Analysis

Rivalry is between complete-machine propositions, not interchangeable hybrid components.

Conventional machines remain relevant where they satisfy the project's requirements; fully electric excavators introduce a different alternative where zero-exhaust operation is required and power support is available.

For hybrid suppliers, a large fleet account can therefore bring negotiated obligations as well as access to customers. OEM-controlled components and dealer support can counter buyer leverage when an alternative supplier cannot provide equivalent contractual coverage.

Entry barriers include compliant regional equipment and a credible fulfillment relationship.

An entrant must establish both access and support; a dealer can contribute contracted service reach, but that relationship does not automatically confer regulatory approval or product rights.

4.6. PESTLE Analysis

Environmental policy creates different commercial gates for Hybrid Excavators. EU non-road machinery rules regulate combustion-engine emissions and require engine type approval, while U.S.

Trade policy exposes equipment commitments to changing commercial costs.

Suppliers and buyers should nevertheless



identify who bears tariff changes and whether delivery commitments remain binding before signing cross-border orders.

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..... Meanwhile, the Volvo EC230 Electric pilot involving Turner Construction and Sunbelt Rentals demonstrates that site-power support can be supplied through an additional commercial relationship. The implication is conditional: improved access to electric-equipment support can weaken the appeal of combustion-dependent hybrids on environmentally restricted projects.

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..... This establishes a historical ownership fact, not current enforceability in every country or an available license. A business seeking rights to supply its own complete-machine platform should establish applicable commercial permissions before committing; neither a patent publication nor another supplier's hydraulic alternative establishes freedom to operate.

4.7. Market Outlook

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..... Oslo's emission-free operating condition demonstrates the counterforce: an efficiency improvement can coexist with loss of project eligibility. The commercial outlook therefore turns on the overlap between accepted work, suitable configurations and enforceable fulfillment, not portfolio announcements alone.

Two directions remain plausible through 2032. Continued combustion acceptance combined with suitable assignments and accountable support can sustain selective hybrid replacement.

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4.7.1. Near-Term Market Outlook (0-2 Years)

For 2026-2027, the immediate commercial task is to turn named portfolios into dated regional commitments.

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Firm order acceptance and conformity responsibility are more useful indicators than the breadth of a launch announcement.

Fleets expecting London assignments should confirm the offered configuration's eligibility across the intended retention period or secure project-specific equipment instead of assuming unrestricted redeployment. This is a local planning condition, not a Global hybrid mandate.

Suppliers should monitor executable competing packages and actual buyer requirements, while buyers should preserve a choice between supported hybrid ownership and assignment-specific alternatives.

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5. Market Insights

5.1. Consumer Insights & End-User Perspective

Hybrid Excavators involve separate capital-purchasing, equipment-use and project-acceptance decisions.

Oslo's emission-free requirements demonstrate why an operator's satisfaction or a fleet buyer's preference cannot establish eligibility for every assignment.

A buyer changing platforms should obtain a replacement support commitment instead of assuming that existing monitoring arrangements follow the new machine. These examples establish decision conditions in named buyer settings, not uniform preferences across all included buyer industries.

5.2. Consumer Experience Benchmarking

Published hybrid efficiency claims do not provide a matched comparison between suppliers. Komatsu's PC365LC-xx.xx page uses the conventional PC360LC-xx.xx as its reference, whereas Volvo's new-generation hybrid announcement compares against previous-series conventional models.

A rental fleet or subsequent buyer may place particular importance on transfer conditions, while an initial owner must distinguish structural protection from hybrid-system protection. Neither proposition substitutes for confirming exclusions and the responsible service organization.

Administrative workload is another relevant experience dimension.



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..... The useful comparison is who reviews information, who initiates action and which
resulting service obligations are actually contracted.

5.3. Opportunity Mapping

Task-matched owner fleets provide a defensible starting point for account qualification.
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compliant conventional machine remains a credible alternative, and a combustion-dependent
offer is unsuitable where the project requires emission-free operation.

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..... For the rental owner, customer interest is insufficient justification for acquisition
unless suitable assignments and retained obligations align. United Rentals' wider-business
disclosure illustrates why operating benefits and support costs need not accrue to the same
organization; it does not establish hybrid-specific contract terms.

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..... The opportunity is the complete
supported assignment, not energy recovery sold independently of task fit. Specialist
equipment can be preferable for sustained handling but less interchangeable across a mixed
excavation fleet.

Installed Japanese HB-series fleets have a retention option distinct from replacement
purchasing.
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This is an ownership-support opportunity within the finished-machine decision, not an additional excavator product category.

5.4. Distribution Channel Analysis

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..... The order should name the invoicing entity, warranty obligor and local service provider. A manufacturer-facing negotiation does not by itself establish that local service is included or that the manufacturer will contract directly with the buyer.

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..... An entrant should prefer a distributor route over direct contracting only where the distributor can assume relevant local obligations and the manufacturer supports that allocation. The trade-off is delegated customer access and service coordination; neither route removes regulatory eligibility or product-rights requirements.

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..... Contractors seeking a hybrid for a defined project should obtain a machine-assignment commitment rather than rely on a catalog entry. Ownership provides greater asset control; hire limits the long-term asset commitment but leaves deployment dependent on the fleet's confirmed allocation.

5.5. Pricing Trend Analysis

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..... Buyers should distinguish asset terms, warranty scope, maintenance responsibility, digital-service entitlement and financing conditions when comparing proposals. A concession on one element need not improve the overall package if another obligation becomes narrower or remains with the owner.
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..... The implication for a hybrid rental

Firm commercial terms

provide certainty but transfer adjustment risk to the party accepting them; an adjustment clause preserves flexibility while exposing the counterparty to later changes.

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■■■■■■■■■■ The June xx.xx 2017 grant publication for EP2826920B1 identifies Kobelco Construction Machinery as proprietor, but does not settle present territorial rights or available licenses. That historical record should not be treated as proof of either current exclusivity or permission to supply a proposed platform.

■■■■■■■■■■ ■■■■■■ These disclosures do not establish a uniform hybrid-specific effect.

Warranty protection changes risk allocation rather than establishing profitability. ■■■■■■■■■■
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commercial package, but not an assumed resale outcome.

■■■■■■■■ Confirmed project hire can preserve the contractor's flexibility, but Flannery's availability condition means that access must be secured. Where suitable assignments or obligation recovery remain uncertain, deferral is more defensible than assuming the technology label will compensate the owner.

[illegible][illegible]

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These offerings support a crawler-specific shortlist, not an assumption that equivalent hybrid configurations can be obtained with other undercarriages. A buyer should retain the required undercarriage in its specification rather than sacrifice task access for a hybrid designation.

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Figure 8. Global Hybrid Excavators Market Size, by Undercarriage, 2025 (%)

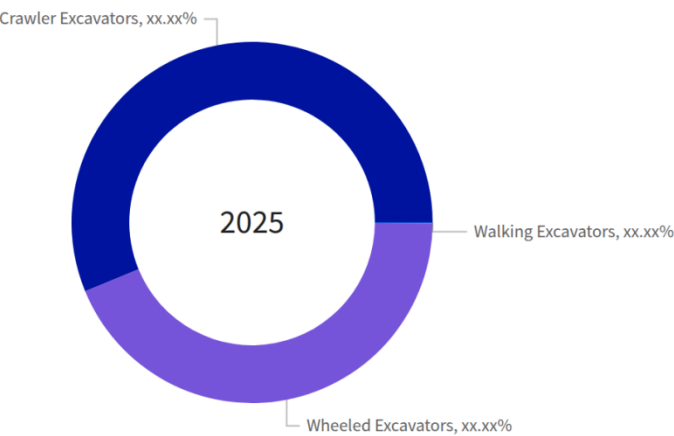


Figure 9. Global Hybrid Excavators Market, by Undercarriage, 2032 (USD Thousand)

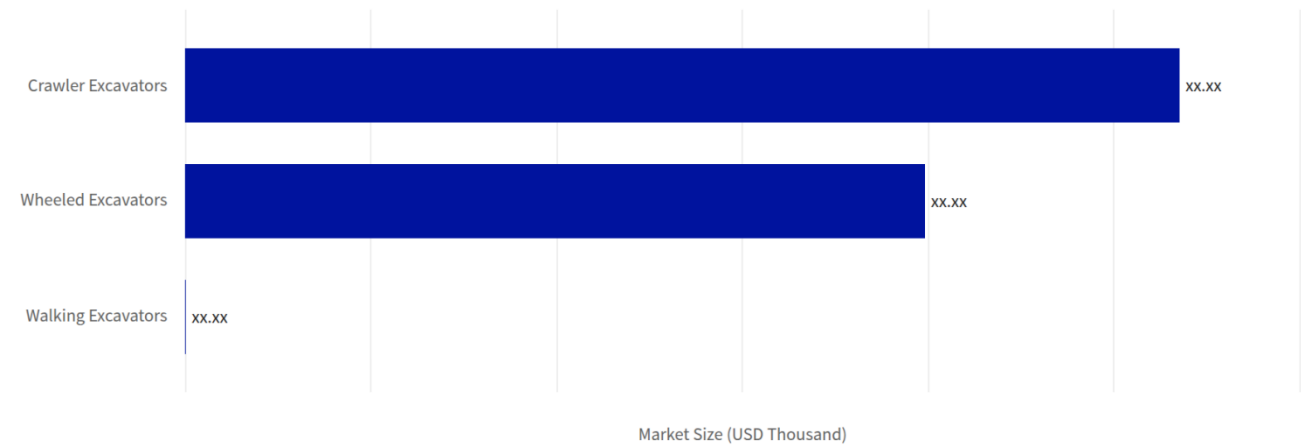


Table 4. Global Hybrid Excavators Market, by Undercarriage growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 5. Global Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

7.1. Crawler Excavators

Table 6. Global Hybrid Excavators Market Size, by Crawler Excavators, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 7. Global Hybrid Excavators Market Size, by Crawler Excavators, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 8. Global Hybrid Excavators Market Size, by Crawler Excavators, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

7.2. Wheeled Excavators

Table 9. Global Hybrid Excavators Market Size, by Wheeled Excavators, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 10. Global Hybrid Excavators Market Size, by Wheeled Excavators, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 11. Global Hybrid Excavators Market Size, by Wheeled Excavators, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



7.3. Walking Excavators

Table 12. Global Hybrid Excavators Market Size, by Walking Excavators, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 13. Global Hybrid Excavators Market Size, by Walking Excavators, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 14. Global Hybrid Excavators Market Size, by Walking Excavators, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

For Battery-Supercapacitor Hybrids, Mechanical Hybrids and Multi-Domain Hybrids, the unresolved purchasing condition is a named complete-machine offer with an accountable seller, applicable local eligibility and hybrid-component support. Component availability or a historical demonstration cannot fulfill that condition.

Figure 10. Global Hybrid Excavators Market Size, by Hybrid Technology, 2025 (%)

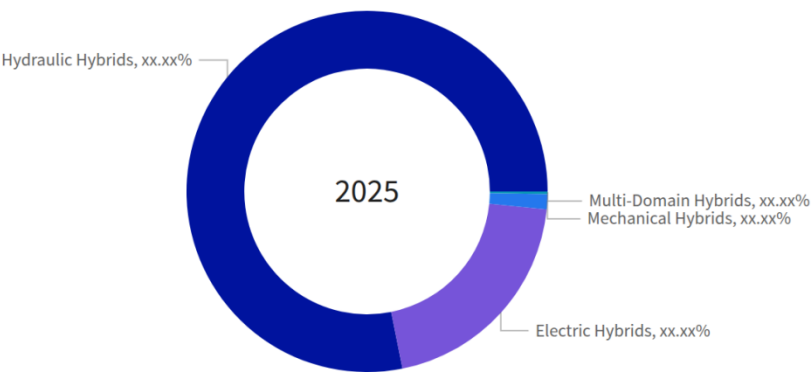


Figure 11. Global Hybrid Excavators Market, by Hybrid Technology, 2032 (USD Thousand)

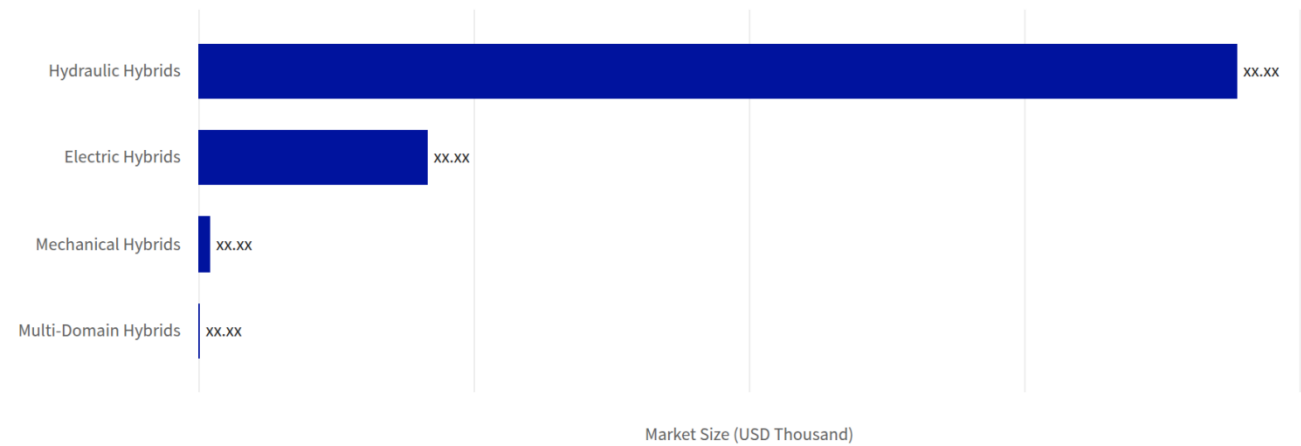


Table 15. Global Hybrid Excavators Market, by Hybrid Technology growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 16. Global Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

8.1. Hydraulic Hybrids

Table 17. Global Hybrid Excavators Market Size, by Hydraulic Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 18. Global Hybrid Excavators Market Size, by Hydraulic Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 19. Global Hybrid Excavators Market Size, by Hydraulic Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

8.2. Electric Hybrids

Table 20. Global Hybrid Excavators Market, by Electric Hybrids growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacit or Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 21. Global Hybrid Excavators Market Size, by Electric Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 22. Global Hybrid Excavators Market Size, by Electric Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 23. Global Hybrid Excavators Market Size, by Electric Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

8.2.1. Battery Hybrids

Table 24. Global Hybrid Excavators Market Size, by Battery Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 25. Global Hybrid Excavators Market Size, by Battery Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 26. Global Hybrid Excavators Market Size, by Battery Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

8.2.2. Supercapacitor Hybrids

Table 27. Global Hybrid Excavators Market Size, by Supercapacitor Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 28. Global Hybrid Excavators Market Size, by Supercapacitor Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 29. Global Hybrid Excavators Market Size, by Supercapacitor Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

8.2.3. Battery-Supercapacitor Hybrids

Table 30. Global Hybrid Excavators Market Size, by Battery-Supercapacitor Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 31. Global Hybrid Excavators Market Size, by Battery-Supercapacitor Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 32. Global Hybrid Excavators Market Size, by Battery-Supercapacitor Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



8.3. Mechanical Hybrids

Table 33. Global Hybrid Excavators Market Size, by Mechanical Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 34. Global Hybrid Excavators Market Size, by Mechanical Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 35. Global Hybrid Excavators Market Size, by Mechanical Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

8.4. Multi-Domain Hybrids

Table 36. Global Hybrid Excavators Market Size, by Multi-Domain Hybrids, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 37. Global Hybrid Excavators Market Size, by Multi-Domain Hybrids, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 38. Global Hybrid Excavators Market Size, by Multi-Domain Hybrids, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

[illegible]

Demolition & Deconstruction makes configuration-specific supply particularly important.



This can narrow the shortlist even when a supplier has a credible hybrid portfolio.

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Figure 12. Global Hybrid Excavators Market Size, by Application, 2025 (%)

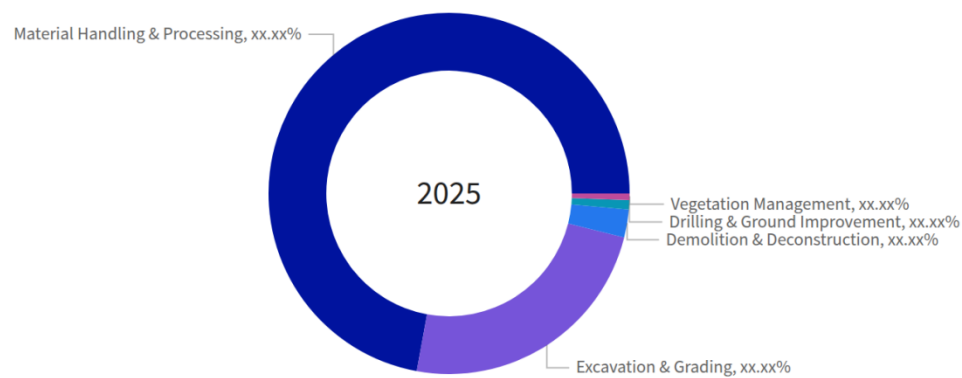


Figure 13. Global Hybrid Excavators Market, by Application, 2032 (USD Thousand)

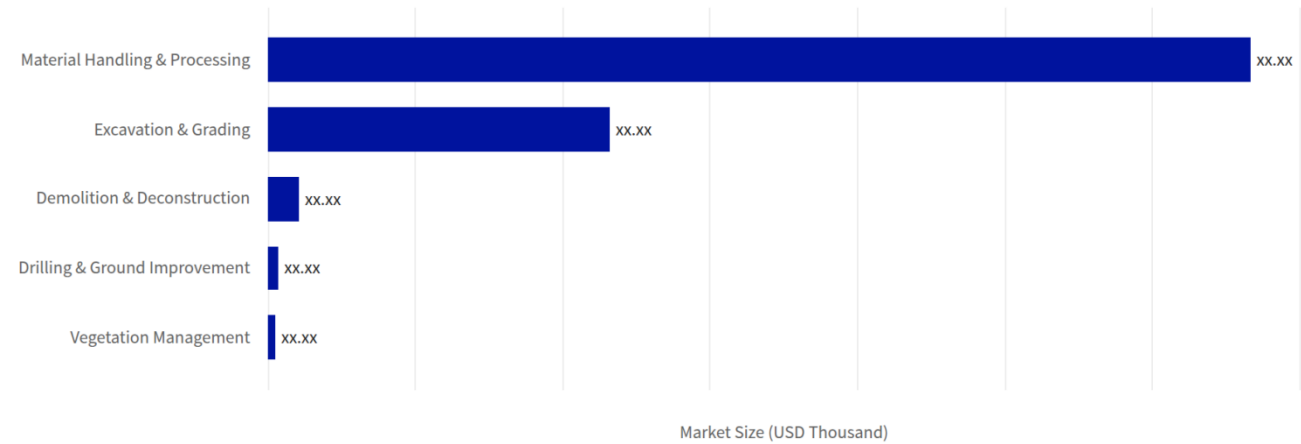


Table 39. Global Hybrid Excavators Market, by Application growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 40. Global Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

9.1. Material Handling & Processing

Table 41. Global Hybrid Excavators Market Size, by Material Handling & Processing, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 42. Global Hybrid Excavators Market Size, by Material Handling & Processing, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 43. Global Hybrid Excavators Market Size, by Material Handling & Processing, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

9.2. Excavation & Grading

Table 44. Global Hybrid Excavators Market Size, by Excavation & Grading, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 45. Global Hybrid Excavators Market Size, by Excavation & Grading, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 46. Global Hybrid Excavators Market Size, by Excavation & Grading, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



9.3. Demolition & Deconstruction

Table 47. Global Hybrid Excavators Market Size, by Demolition & Deconstruction, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 48. Global Hybrid Excavators Market Size, by Demolition & Deconstruction, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 49. Global Hybrid Excavators Market Size, by Demolition & Deconstruction, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

9.4. Drilling & Ground Improvement

Table 50. Global Hybrid Excavators Market Size, by Drilling & Ground Improvement, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 51. Global Hybrid Excavators Market Size, by Drilling & Ground Improvement, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 52. Global Hybrid Excavators Market Size, by Drilling & Ground Improvement, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



9.5. Vegetation Management

Table 53. Global Hybrid Excavators Market Size, by Vegetation Management, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 54. Global Hybrid Excavators Market Size, by Vegetation Management, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 55. Global Hybrid Excavators Market Size, by Vegetation Management, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



10. Hybrid Excavators Market, by Buyer Industry

..... Schlüter's 2026 Reichelt Tiefbau account concerns a Construction contractor adding a hybrid to its fleet for wind-farm earthworks; the electricity project does not make that contractor a Utilities purchaser. Suppliers should identify the purchasing entity, budget authority and intended fleet role before treating an infrastructure project as an equipment-sales prospect.

Equipment Rental & Leasing introduces a distinct ownership decision. Flannery's October 2018 hybrid order documents a hire-business purchasing commitment, while its quotation process makes specific models subject to availability.

Named quarry and forestry records demonstrate why sector constituents should not be treated as uniform purchasing populations. Comparable work and the actual acquisition relationship remain prerequisites for transferring the examples.

Waste Management & Remediation and Public Administration & Defense can involve different parties in the same project. The Department of Energy's February 2024 Oak Ridge account describes contractor UCOR demonstrating a hybrid excavator during soil remediation and considering future equipment access.

For Utilities, Manufacturing, Transportation & Storage and Landscaping Services, an in-house fleet requirement must be distinguished from work purchased from a contractor.

Figure 14. Global Hybrid Excavators Market Size, by Buyer Industry, 2025 (%)



Table 56. Global Hybrid Excavators Market, by Buyer Industry growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 57. Global Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.1. Waste Management & Remediation

Table 58. Global Hybrid Excavators Market Size, by Waste Management & Remediation, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 59. Global Hybrid Excavators Market Size, by Waste Management & Remediation, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 60. Global Hybrid Excavators Market Size, by Waste Management & Remediation, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



10.2. Transportation & Storage

Table 61. Global Hybrid Excavators Market Size, by Transportation & Storage, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 62. Global Hybrid Excavators Market Size, by Transportation & Storage, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 63. Global Hybrid Excavators Market Size, by Transportation & Storage, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.3. Construction

Table 64. Global Hybrid Excavators Market Size, by Construction, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 65. Global Hybrid Excavators Market Size, by Construction, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 66. Global Hybrid Excavators Market Size, by Construction, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.4. Manufacturing

Table 67. Global Hybrid Excavators Market Size, by Manufacturing, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 68. Global Hybrid Excavators Market Size, by Manufacturing, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 69. Global Hybrid Excavators Market Size, by Manufacturing, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.5. Equipment Rental & Leasing

Table 70. Global Hybrid Excavators Market Size, by Equipment Rental & Leasing, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 71. Global Hybrid Excavators Market Size, by Equipment Rental & Leasing, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 72. Global Hybrid Excavators Market Size, by Equipment Rental & Leasing, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.6. Mining, Quarrying & Oil & Gas Extraction

Table 73. Global Hybrid Excavators Market Size, by Mining, Quarrying & Oil & Gas Extraction, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 74. Global Hybrid Excavators Market Size, by Mining, Quarrying & Oil & Gas Extraction, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 75. Global Hybrid Excavators Market Size, by Mining, Quarrying & Oil & Gas Extraction, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.7. Agriculture, Forestry & Fishing

Table 76. Global Hybrid Excavators Market Size, by Agriculture, Forestry & Fishing, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 77. Global Hybrid Excavators Market Size, by Agriculture, Forestry & Fishing, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 78. Global Hybrid Excavators Market Size, by Agriculture, Forestry & Fishing, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



10.8. Utilities

Table 79. Global Hybrid Excavators Market Size, by Utilities, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 80. Global Hybrid Excavators Market Size, by Utilities, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 81. Global Hybrid Excavators Market Size, by Utilities, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

10.9. Public Administration & Defense

Table 82. Global Hybrid Excavators Market Size, by Public Administration & Defense, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 83. Global Hybrid Excavators Market Size, by Public Administration & Defense, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
BRICS	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
European Union	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
G7	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
GCC	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
NATO	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX

Table 84. Global Hybrid Excavators Market Size, by Public Administration & Defense, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Brazil	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Canada	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
China	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
France	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Germany	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
India	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Italy	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Japan	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Mexico	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Russia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
South Korea	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Spain	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
United Kingdom	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
United States	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Others	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Total	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX



10.10. Landscaping Services

Table 85. Global Hybrid Excavators Market Size, by Landscaping Services, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 86. Global Hybrid Excavators Market Size, by Landscaping Services, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 87. Global Hybrid Excavators Market Size, by Landscaping Services, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Manufacturer Direct Sales and Independent Dealer and Distributor Sales should be compared through seller control, transaction responsibility and support obligations.

This establishes a producer-controlled commercial route, not the contracting party or terms for an individual order.

██████████ Neither establishes present availability of that configuration or the remedies in a proposed contract. Sole-distributor status also does not, by itself, settle ownership control or title-taking for channel classification.

Before either route is committed, the order should identify the seller, warranty obligor, service provider and responsibility for the offered configuration. A quotation button, dealer authorization or online ordering interface cannot establish those relationships on its own.

Figure 16. Global Hybrid Excavators Market Size, by Sales Channel, 2025 (%)

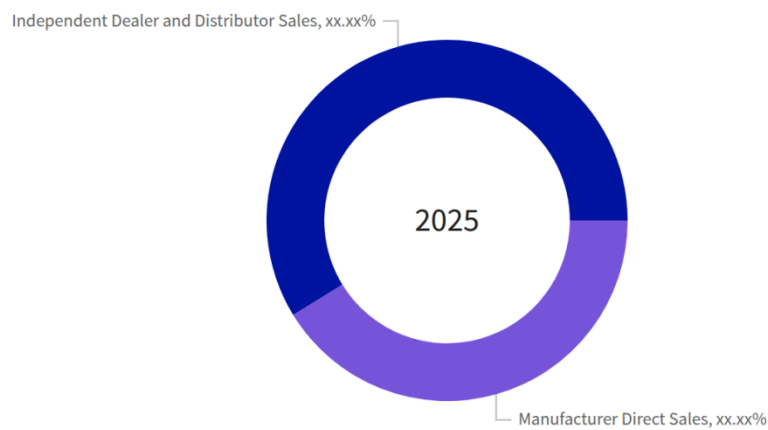


Figure 17. Global Hybrid Excavators Market, by Sales Channel, 2032 (USD Thousand)

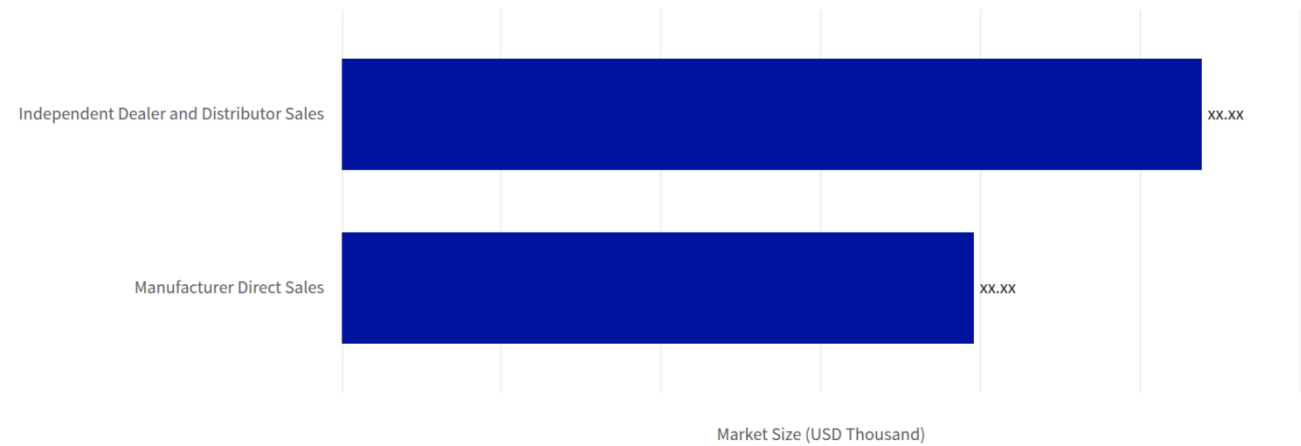


Table 88. Global Hybrid Excavators Market, by Sales Channel growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 89. Global Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

11.1. Independent Dealer and Distributor Sales

Table 90. Global Hybrid Excavators Market Size, by Independent Dealer and Distributor Sales, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 91. Global Hybrid Excavators Market Size, by Independent Dealer and Distributor Sales, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 92. Global Hybrid Excavators Market Size, by Independent Dealer and Distributor Sales, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

11.2. Manufacturer Direct Sales

Table 93. Global Hybrid Excavators Market Size, by Manufacturer Direct Sales, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 94. Global Hybrid Excavators Market Size, by Manufacturer Direct Sales, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 95. Global Hybrid Excavators Market Size, by Manufacturer Direct Sales, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Operating Weight should be applied to the specified machine configuration rather than a nominal model class. ISO xx.xx defines operating mass by reference to the manufacturer's specified configuration, equipment, empty attachment and operating provisions.

The HB205 family illustrates why generation and specification matter near a boundary.

A buyer with a binding weight limit needs a matching regional offer and confirmation of the weight basis rather than an assurance based on the HB205 name.

The larger bands also require configuration-level treatment. Komatsu's published PC365LC-xx.xx configurations provide a documented xx.xx to Less Than xx.xx Metric Tons example.

For procurement, the practical consequence is to obtain an agreed configuration and transport commitment before selecting a machine close to an access limit. A lighter configuration is not automatically the better commercial choice if it fails the required work specification; a heavier alternative is not suitable merely because its hybrid architecture is attractive.

Figure 18. Global Hybrid Excavators Market Size, by Operating Weight, 2025 (%)

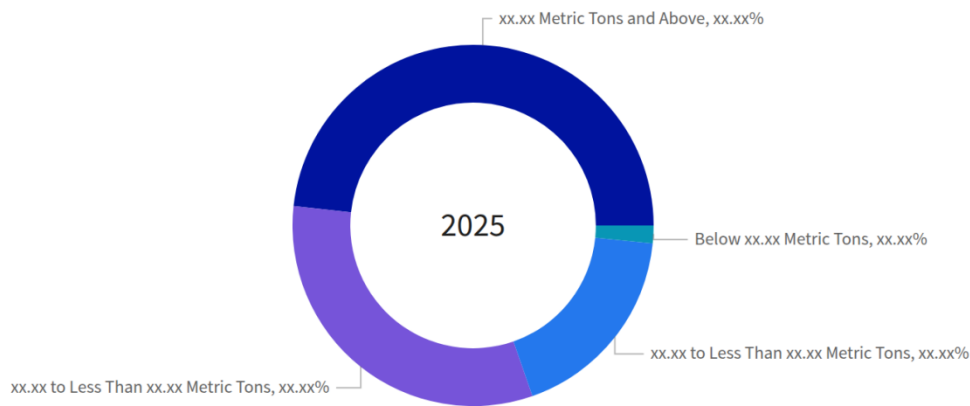


Figure 19. Global Hybrid Excavators Market, by Operating Weight, 2032 (USD Thousand)

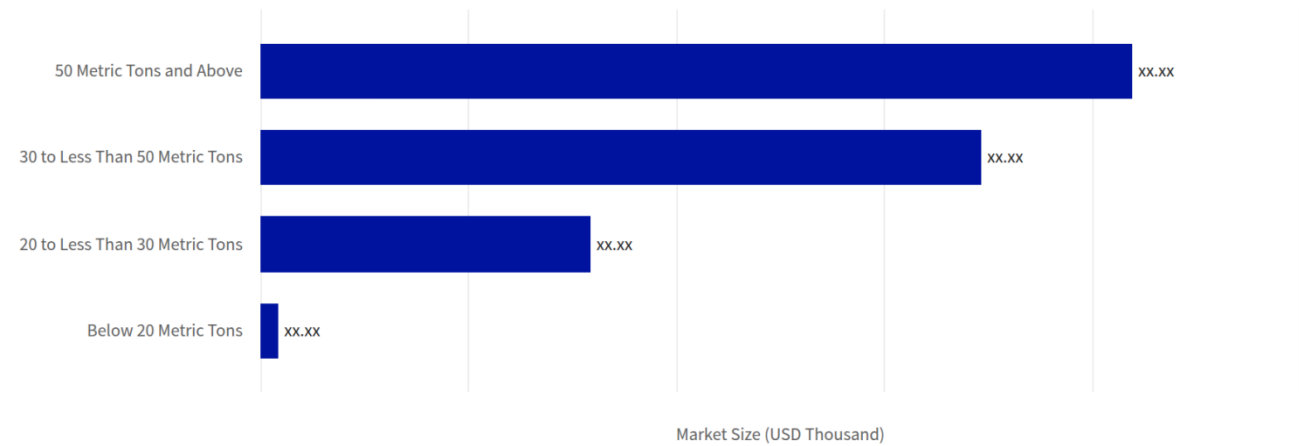


Table 96. Global Hybrid Excavators Market, by Operating Weight growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 97. Global Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

12.1. 50 Metric Tons and Above

Table 98. Global Hybrid Excavators Market Size, by xx.xx Metric Tons and Above, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 99. Global Hybrid Excavators Market Size, by xx.xx Metric Tons and Above, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 100. Global Hybrid Excavators Market Size, by xx.xx Metric Tons and Above, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

12.2. 30 to Less Than 50 Metric Tons

Table 101. Global Hybrid Excavators Market Size, by xx.xx to Less Than xx.xx Metric Tons, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 102. Global Hybrid Excavators Market Size, by xx.xx to Less Than xx.xx Metric Tons, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 103. Global Hybrid Excavators Market Size, by xx.xx to Less Than xx.xx Metric Tons, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

12.3. 20 to Less Than 30 Metric Tons

Table 104. Global Hybrid Excavators Market Size, by xx.xx to Less Than xx.xx Metric Tons, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 105. Global Hybrid Excavators Market Size, by xx.xx to Less Than xx.xx Metric Tons, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 106. Global Hybrid Excavators Market Size, by xx.xx to Less Than xx.xx Metric Tons, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

12.4. Below 20 Metric Tons

Table 107. Global Hybrid Excavators Market Size, by Below xx.xx Metric Tons, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 108. Global Hybrid Excavators Market Size, by Below xx.xx Metric Tons, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 109. Global Hybrid Excavators Market Size, by Below xx.xx Metric Tons, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



13. Hybrid Excavators Market, by Region

Asia-Pacific supports country-specific procurement rather than a single regional configuration.

Standardization is useful only where the seller confirms compatibility and territorial obligations; otherwise, separate local commitments provide clearer accountability.

This gives buyers a regionally positioned electric-hybrid offering to investigate, but the introduction does not establish delivery commitments throughout the region. Suppliers should distinguish a regional product launch from a country-specific quotation and an assigned service provider.

Latin America should not be treated as an extension of the North American model portfolio. Komatsu's Brazilian business materials describe the HB205-xx.xx and direct inquiries to local dealers.

Consequently, a compliant combustion-dependent hybrid can face materially different assignment opportunities within Europe. Fleet purchasers should establish the projects a machine may serve before relying on cross-border redeployment; engine-stage compliance does not itself satisfy an emission-free operating condition.

The Middle East offers documented regional logistics infrastructure, but that infrastructure must be connected to the particular hybrid being purchased. A buyer should obtain a model-specific support commitment before treating a regional hub as sufficient justification for an imported machine.

They are not evidence of a particular country's orderability or unlimited hybrid-component coverage. A distributor route is defensible when it adds enforceable machine-specific obligations; an independently sourced machine remains a weaker choice where those obligations cannot be secured.

Figure 20. Global Hybrid Excavators Market, by Region: Market share evolution, 2025-2032

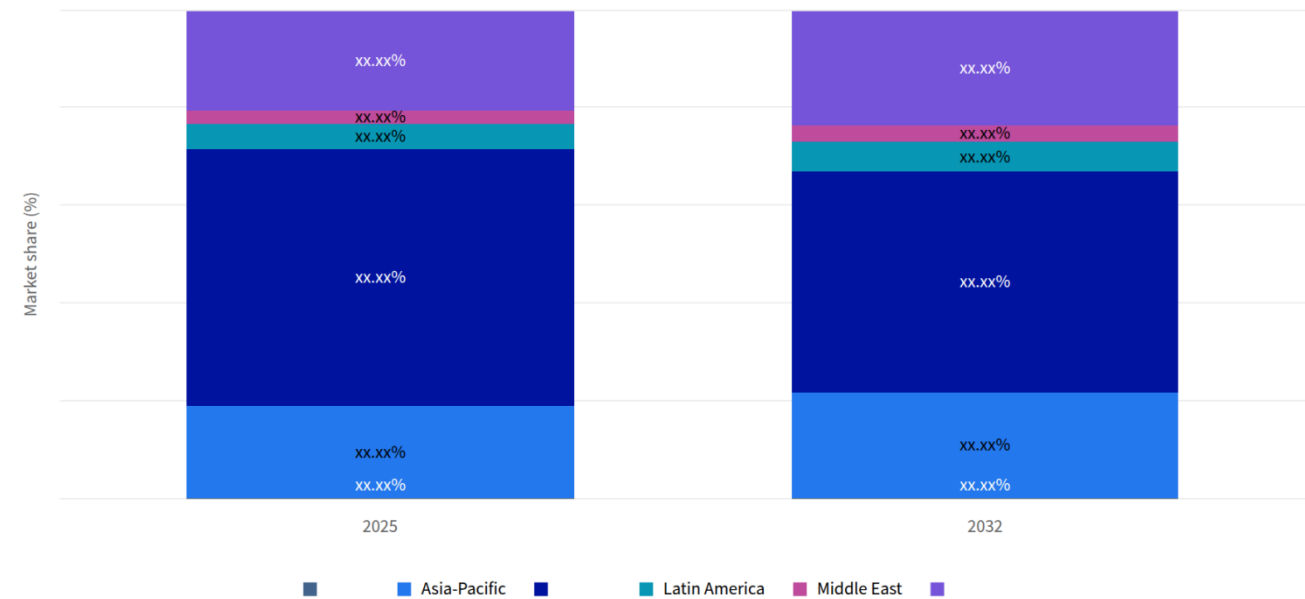


Figure 21. Global Hybrid Excavators Market, by Region: Market size by category, 2025

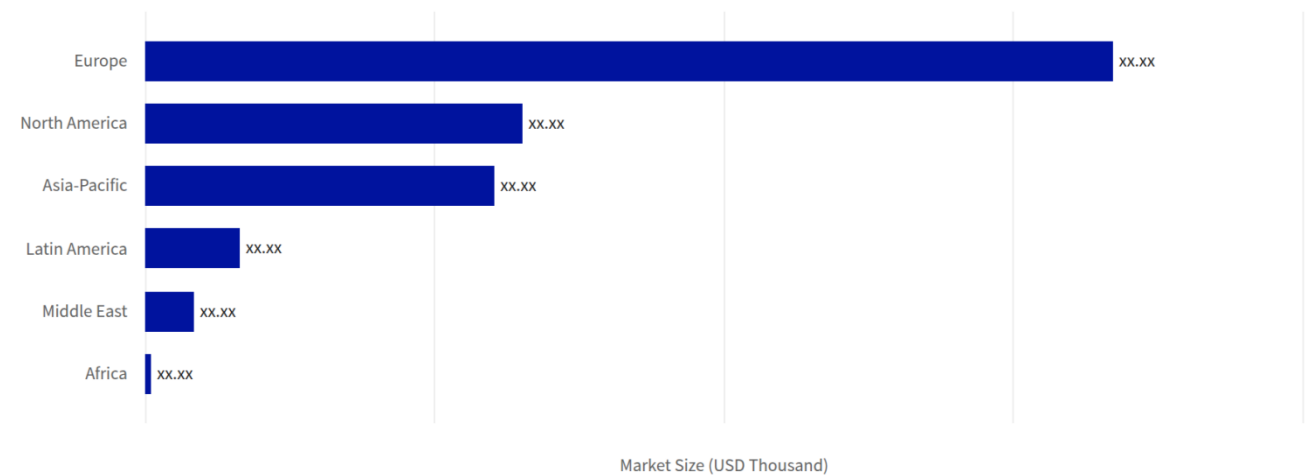




Figure 22. Global Hybrid Excavators Market, Regional growth by Sales Channel, 2025-2032 (CAGR %)

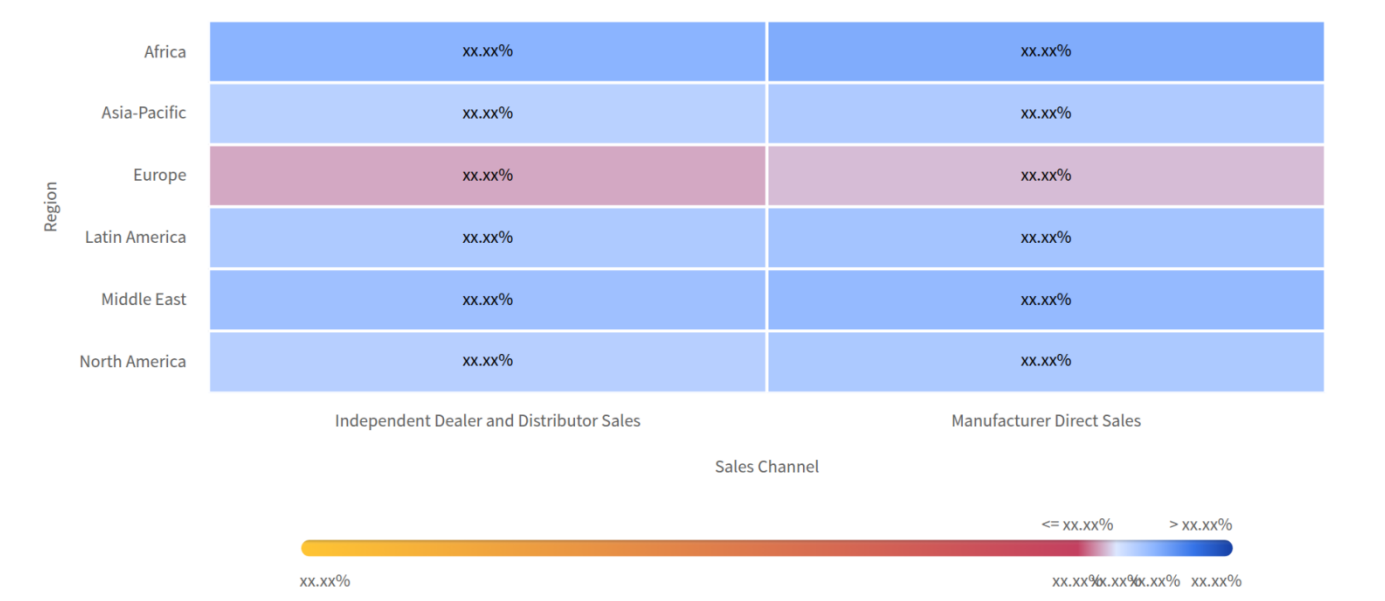


Table 110. Global Hybrid Excavators Market, by Region growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 111. Global Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



13.1. Europe

Table 112. Europe Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 113. Europe Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 114. Europe Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 115. Europe Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 116. Europe Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 117. Europe Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 118. Europe Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 119. Europe Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 120. Europe Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

13.2. North America

Table 121. North America Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 122. North America Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 123. North America Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 124. North America Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 125. North America Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 126. North America Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 127. North America Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 128. North America Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 129. North America Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

13.3. Asia-Pacific

Table 130. Asia-Pacific Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 131. Asia-Pacific Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 132. Asia-Pacific Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 133. Asia-Pacific Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 134. Asia-Pacific Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 135. Asia-Pacific Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 136. Asia-Pacific Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 137. Asia-Pacific Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 138. Asia-Pacific Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

13.4. Latin America

Table 139. Latin America Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 140. Latin America Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 141. Latin America Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 142. Latin America Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 143. Latin America Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 144. Latin America Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 145. Latin America Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 146. Latin America Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 147. Latin America Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

13.5. Middle East

Table 148. Middle East Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 149. Middle East Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 150. Middle East Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 151. Middle East Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 152. Middle East Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 153. Middle East Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 154. Middle East Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 155. Middle East Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 156. Middle East Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

13.6. Africa

Table 157. Africa Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 158. Africa Hybrid Excavators Market Size, by Region, 2017-2040 (USD Thousand)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 159. Africa Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 160. Africa Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 161. Africa Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 162. Africa Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 163. Africa Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 164. Africa Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 165. Africa Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



14. Hybrid Excavators Market, by Group

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..... An Americas-wide purchasing agreement should therefore identify the responsible importer and required authorization for each destination. A shared supplier relationship cannot replace those country-specific obligations.

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..... An EMEA master agreement can coordinate responsibilities only if its schedules identify the covered machines, territories and service obligors. Separate local contracts are preferable where the regional agreement leaves those boundaries unresolved; regional management responsibility alone does not demonstrate transferable support.

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.....
..... A distributor can coordinate regional selling, but routing an overseas-sourced hybrid through an ASEAN warehouse does not itself establish preferential origin. Before choosing a regional hub over direct destination supply, the seller should establish the applicable origin entitlement, importing member's requirements and local hybrid-support commitment.

GCC has a shared customs-administration mechanism, but not an automatic equipment acceptance decision.
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.....
..... Common procedures can simplify coordination without proving that an individual excavator has completed every required step.

Australasia offers a concrete basis for coordinated product discussions: Komatsu lists the HB365LC-xx.xx in both Australia and New Zealand.
.....
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..... Separate national orders remain the clearer alternative where those commitments do not transfer, even when the catalog model names match.

.....
.....



Figure 23. Global Hybrid Excavators Market Size, by Group, 2025 vs 2026 vs 2032

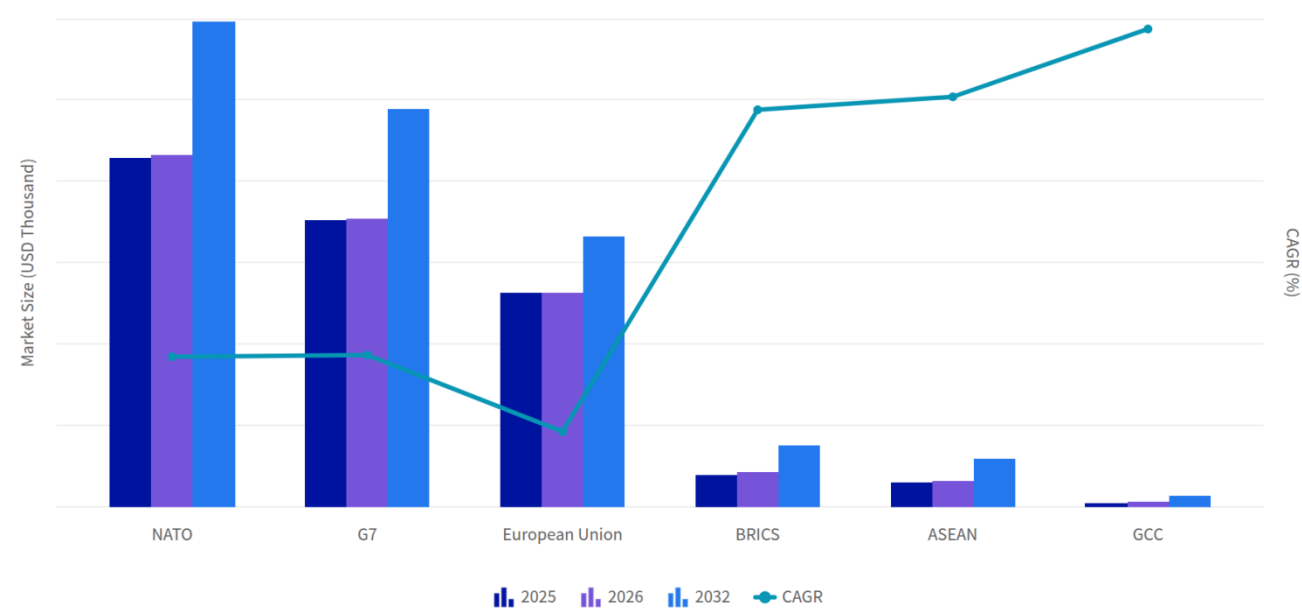


Table 166. Global Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

14.1. NATO

Table 167. NATO Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 167 - continued

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



Table 168. NATO Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 168 - continued

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bulgaria	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Canada	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Croatia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Czech Republic	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Denmark	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Estonia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Finland	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
France	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Germany	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Greece	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Hungary	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Iceland	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Italy	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Latvia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Lithuania	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Luxembourg	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Montenegro	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Netherlands	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
North Macedonia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Norway	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Poland	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Portugal	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Romania	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Slovakia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Slovenia	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Spain	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Sweden	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
Turkey	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
United Kingdom	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX
United States	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX	XX.XX

Table 169. NATO Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 170. NATO Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 171. NATO Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 172. NATO Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 173. NATO Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 174. NATO Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 175. NATO Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

14.2. G7

Table 176. G7 Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 177. G7 Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 178. G7 Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 179. G7 Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 180. G7 Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 181. G7 Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 182. G7 Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 183. G7 Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 184. G7 Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

14.3. European Union

Table 185. European Union Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 186. European Union Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 187. European Union Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 188. European Union Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 189. European Union Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 190. European Union Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 191. European Union Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 192. European Union Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 193. European Union Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

14.4. BRICS

Table 194. BRICS Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 195. BRICS Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 196. BRICS Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 197. BRICS Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 198. BRICS Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 199. BRICS Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 200. BRICS Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 201. BRICS Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 202. BRICS Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

14.5. ASEAN

Table 203. ASEAN Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 204. ASEAN Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 205. ASEAN Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 206. ASEAN Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 207. ASEAN Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 208. ASEAN Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 209. ASEAN Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 210. ASEAN Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 211. ASEAN Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

14.6. GCC

Table 212. GCC Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 213. GCC Hybrid Excavators Market Size, by Group, 2017-2040 (USD Thousand)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 214. GCC Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 215. GCC Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 216. GCC Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 217. GCC Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 218. GCC Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 219. GCC Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 220. GCC Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Canada offers a conditional recognition route that is more specific than a general North American product launch.

Recognition can reduce duplication, but does not make an overseas listing or U.S. commercial description sufficient for Canadian importation.

Buyers should require the relevant record for the offered machine rather than infer authorization from the HB205-xx.xx's Brazilian marketing description. Local sourcing can delegate coordination to an accountable seller; own importation is a different choice requiring the buyer to accept the applicable authorization responsibilities.

The Netherlands separates support for zero-emission acquisition from a general preference for cleaner machinery. SSEB Aanschaf targets new emission-free construction machines bought or leased by eligible construction businesses and equipment-rental businesses. ■

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Japan has a documented hybrid-specific component-life-extension proposition.

An exporter or overseas buyer should not assume that the Japanese program follows the asset; model eligibility, territorial coverage, warranty treatment and delivery responsibility require a specific commitment.

A buyer should compare that accountable distributor route with an overseas offer only after confirming the obligations applicable to its project location. The dated program description supports the commercial mechanism, not an individual repair remedy or present deployment commitment.

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[illegible]

Figure 24. Global Hybrid Excavators Market Size, by Country, 2025 vs 2032 (%)

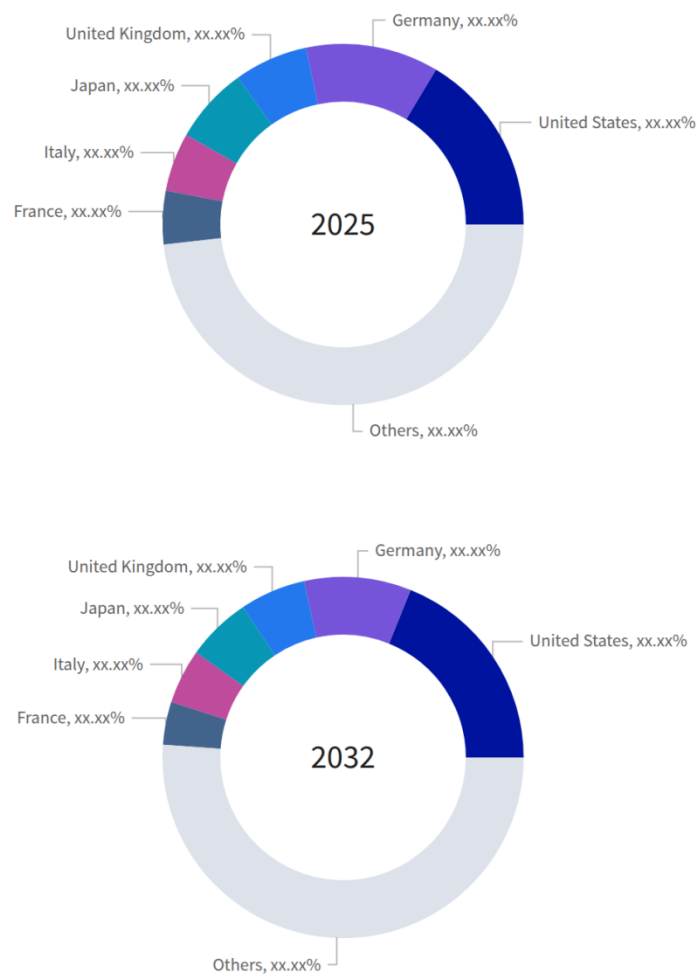




Figure 25. Global Hybrid Excavators Market Size, by Country, 2025 vs 2026 vs 2032

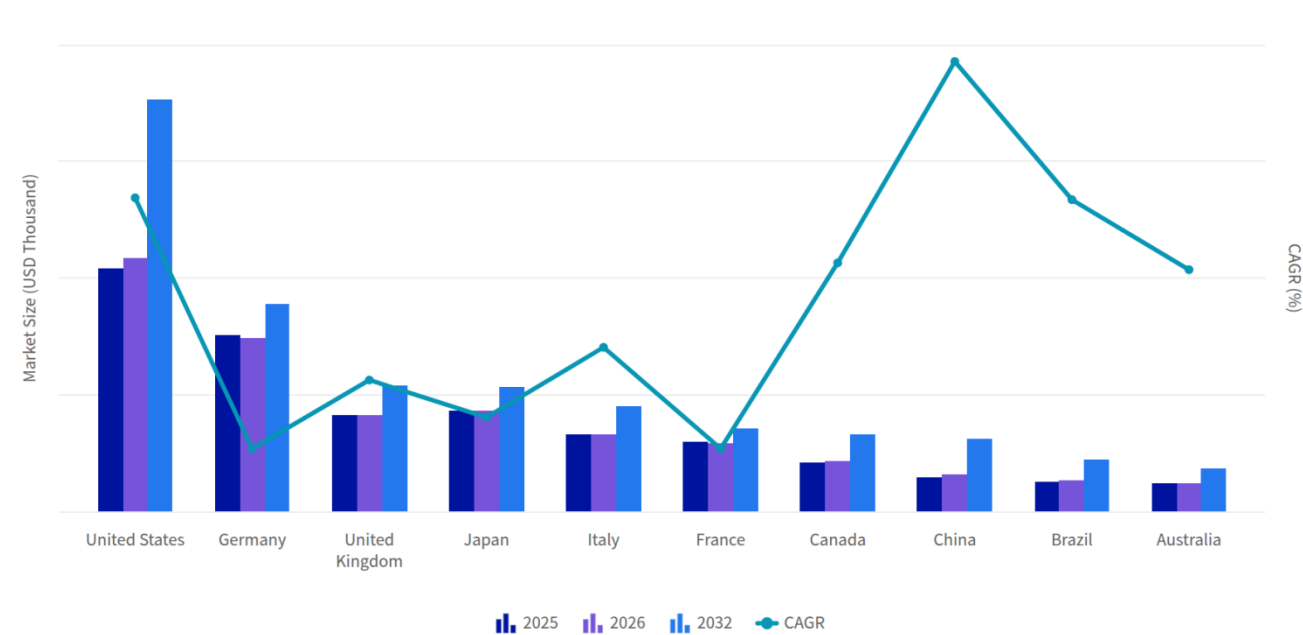


Table 221. Global Hybrid Excavators Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Thousand)	2032 value (USD Thousand)	Added value (USD Thousand)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 222. Global Hybrid Excavators Market Size, by Country, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.1. United States

Table 223. United States Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 224. United States Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 225. United States Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 226. United States Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 227. United States Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 228. United States Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 229. United States Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 230. United States Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.2. Germany

Table 231. Germany Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 232. Germany Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 233. Germany Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 234. Germany Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 235. Germany Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 236. Germany Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 237. Germany Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 238. Germany Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.3. Japan

Table 239. Japan Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 240. Japan Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 241. Japan Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 242. Japan Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 243. Japan Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 244. Japan Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 245. Japan Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 246. Japan Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.4. United Kingdom

Table 247. United Kingdom Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 248. United Kingdom Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 249. United Kingdom Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 250. United Kingdom Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 251. United Kingdom Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 252. United Kingdom Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 253. United Kingdom Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 254. United Kingdom Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.5. Italy

Table 255. Italy Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 256. Italy Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 257. Italy Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 258. Italy Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 259. Italy Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 260. Italy Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 261. Italy Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 262. Italy Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.6. France

Table 263. France Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 264. France Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 265. France Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 266. France Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 267. France Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 268. France Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 269. France Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 270. France Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.7. Canada

Table 271. Canada Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 272. Canada Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 273. Canada Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 274. Canada Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 275. Canada Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 276. Canada Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 277. Canada Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 278. Canada Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.8. China

Table 279. China Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 280. China Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 281. China Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 282. China Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 283. China Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 284. China Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 285. China Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 286. China Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.9. Spain

Table 287. Spain Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 288. Spain Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 289. Spain Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 290. Spain Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 291. Spain Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 292. Spain Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 293. Spain Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 294. Spain Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.10. Brazil

Table 295. Brazil Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 296. Brazil Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 297. Brazil Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 298. Brazil Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 299. Brazil Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 300. Brazil Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 301. Brazil Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 302. Brazil Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.11. Australia

Table 303. Australia Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 304. Australia Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 305. Australia Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 306. Australia Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 307. Australia Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 308. Australia Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 309. Australia Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 310. Australia Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.12. India

Table 311. India Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 312. India Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 313. India Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 314. India Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 315. India Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 316. India Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 317. India Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 318. India Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.13. Russia

Table 319. Russia Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 320. Russia Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 321. Russia Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 322. Russia Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 323. Russia Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 324. Russia Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 325. Russia Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 326. Russia Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.14. South Korea

Table 327. South Korea Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 328. South Korea Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 329. South Korea Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 330. South Korea Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 331. South Korea Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 332. South Korea Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 333. South Korea Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 334. South Korea Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

15.15. Mexico

Table 335. Mexico Hybrid Excavators Market Size, 2017-2040 (USD Thousand)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 336. Mexico Hybrid Excavators Market Size, by Undercarriage, 2017-2040 (USD Thousand)

Undercarriage	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Crawler Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Walking Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wheeled Excavators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 337. Mexico Hybrid Excavators Market Size, by Hybrid Technology, 2017-2040 (USD Thousand)

Hybrid Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Electric Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydraulic Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mechanical Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Domain Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 338. Mexico Hybrid Excavators Market Size, by Electric Hybrids, 2017-2040 (USD Thousand)

Electric Hybrids	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Battery Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Battery-Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Supercapacitor Hybrids	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 339. Mexico Hybrid Excavators Market Size, by Application, 2017-2040 (USD Thousand)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Demolition & Deconstruction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Drilling & Ground Improvement	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Excavation & Grading	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Material Handling & Processing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vegetation Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 340. Mexico Hybrid Excavators Market Size, by Buyer Industry, 2017-2040 (USD Thousand)

Buyer Industry	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Agriculture, Forestry & Fishing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Construction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Equipment Rental & Leasing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Landscaping Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mining, Quarrying & Oil & Gas Extraction	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Public Administration & Defense	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation & Storage	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Utilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Waste Management & Remediation	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 341. Mexico Hybrid Excavators Market Size, by Sales Channel, 2017-2040 (USD Thousand)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Independent Dealer and Distributor Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Manufacturer Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 342. Mexico Hybrid Excavators Market Size, by Operating Weight, 2017-2040 (USD Thousand)

Operating Weight	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Below xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx Metric Tons and Above	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
xx.xx to Less Than xx.xx Metric Tons	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx



16. Competitive Landscape

16.1. Market Share Analysis, 2025

Competitive positioning in Hybrid Excavators turns on access to a supported machine for the buyer's work. Komatsu Ltd.'s U.S.-facing PC365LC-xx.xx and Volvo Construction Equipment's hydraulic-hybrid crawler portfolio provide named alternatives with different architectures.

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Lifecycle status materially changes the available route to an account. Caterpillar Inc. labels the 336E H Hybrid non-current.

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Regional propositions can widen a buyer's inquiry set without supplying equivalent access.

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either into a committed assignment, the buyer should establish the offered feature, order
acceptance and accountable service arrangement rather than transfer another supplier's
architecture claims or customer outcomes.

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However, the brochure and product-page contracting names are not reconciled by a
registry-backed relationship, and destination fulfillment remains unsettled. For a buyer
requiring a wheeled configuration, the appropriate next decision is legal-counterparty and
machine-specific offer verification, not assumed equivalence with an established local supply
commitment.

2025

Company	Market Share (%)
Liebherr	xx.xx%
Others	xx.xx%
Komatsu Ltd.	xx.xx%
Volvo Construction	xx.xx%
SENNEBOGEN	xx.xx%

Key Player	Share (%)
Kobelco Construction Machinery Co., Ltd.	xx.xx
Komatsu Ltd.	xx.xx
Liebherr	xx.xx
Mantsinen Group Ltd Oy	xx.xx
SANY Group	xx.xx
SENNEBOGEN	xx.xx
Sunward	xx.xx
Terex Corporation	xx.xx
Volvo Construction Equipment	xx.xx
Others	xx.xx

Commercial control is exercised through complete-machine support and access to replacement components, not simply through the number of advertised hybrid technologies.

Procurement leverage therefore depends on the ability to replace the supported machine, not merely identify another energy-recovery technology.

Several company names represent overlapping commercial relationships rather than independent purchasing alternatives.



Buyers seeking alternative sources should obtain bids from distinct supported machine portfolios and identify the contracting entity; historical group attribution does not settle every subsequent transaction.

An entrant should use such a route only when the partner and OEM accept obligations for the exact machine and destination. The trade-off is dependence on that channel's execution and contractual remedies rather than direct control of the customer relationship.

The retained PUNCH Flybrid and STW identities therefore describe different roles in a documented supplier relationship, not independently established finished-machine alternatives. An OEM considering that route still needs applicable supply rights, commercial responsibility and a supported production-machine proposition.

16.3. Recent Developments & Impact Analysis, 2025

New-generation introductions broaden configuration choices but should be distinguished from completed customer fulfillment. A replacement buyer should establish the exact regional generation being quoted and its delivery and support terms; a launch does not itself allocate equipment to a project.

Specialist deployment evidence supplies a different commercial signal. SENNEBOGEN's June xx.xx 2026 account identifies an xx.xx E Hybrid crawler commissioned at August Oppermann's Vienenburg gravel operation on January xx.xx 2025 and names Schlüter Baumaschinen as the procurement-support partner.

Customers with continuing equipment obligations should establish the responsible successor business and local warranty provider. Neither event, by itself, establishes a new hybrid model, unified local service coverage or fewer eligible hybrid machine choices.

Lifecycle support can change the retention decision independently of a new-machine launch.

Owners deciding between retention and replacement should confirm model and territorial eligibility before relying on that route.

16.4. Product Portfolio Analysis, 2025

These portfolios give excavation buyers different complete-machine choices; they do not establish interchangeable configurations or a common operating benefit. A fleet should compare the regional model offered for its assignments rather than select an architecture independently of the machine.

Primary electric drive and energy recovery are separate characteristics. Port, recycling and industrial buyers should compare matched mobile or crawler packages and their assigned handling work, not treat stationary, portal and earthmoving configurations as equivalent alternatives.

Compact offerings compete around access to electrically powered work as well as excavation capability.

Buyers undertaking

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Lishide Construction Machinery Co., Ltd.'s SC240.10ES and the supplier-presented CES490-xx.xx from Sichuan Bonny Heavy Machinery Co., Ltd. extend source-switching propositions into different excavation settings. Their descriptions emphasize selectable diesel and electric operation, making site electricity and the actual assignment important purchasing conditions.

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[illegible]

Commercial stage differentiates mining and challenger propositions. XCMG's February 2026 Indonesian announcement identifies XE650EK as exhibited equipment; its broader handover statement does not identify delivery of that model. ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■

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Adjacent electric alternatives can change a project shortlist without proving hybrid participation. HEVTEC identifies Nasta AS's ZE690 as a grid-battery electric integration reference and reports a December 2024 Norwegian customer delivery.

[illegible]

The same purchasing discipline applies to Walking Excavators, Battery-Supercapacitor Hybrids, Mechanical Hybrids and Multi-Domain Hybrids. Their inclusion in the market does not make an upstream controller, conversion reference or development platform a supported complete-machine offer in those categories.



17. Company Profiles

17.1. Komatsu Ltd.

Komatsu connects a supercapacitor-based crawler offering with ownership-transfer protection. Its U.S.-facing PC365LC-xx.xx portfolio provides quotation and dealer-contact routes and advertises a seven-year/xx.xx-hour fully transferable warranty for electric swing system components.

HB-series owners can investigate this replacement route, but should not assume eligibility extends to the PC365LC-xx.xx or an exported machine. Warranty protection and access to replacement components are different commitments.

The undated customer account does not establish present delivery availability or entitlement to either the U.S. warranty or Japanese component program. A purchase should therefore connect the exact model, ownership relationship and service territory in one accountable offer.

Sources & Evidence

- 1. Company info | About us | Komatsu global site
 - Company verification: The corporate profile, dated April xx.xx 2026, identifies Komatsu Ltd. and its continuing manufacturing and sales business in construction and mining machinery.
- 2. Same job, less fuel: rising costs put hybrid excavators back in focus
 - Company verification: Komatsu's September xx.xx 2026 Australian business article identifies HB215LC-xx.xx and HB365LC-xx.xx as its hybrid excavator range.
 - Company verification: The article reports continuing use of Komatsu hybrid machines by Australian customer Divall's Earthmoving, supporting an established commercial fleet role rather than exhibition-only activity.
- 3. HB365LC-3 hybrid hydraulic excavator - Drive performance, fuel efficiency and sustainability
 - Company verification: Komatsu's HB365LC-xx.xx sales sheet offers a hybrid hydraulic excavator with an electrical swing system and directs buyers to local distributors.
- 4. Minería Superficie | Komatsu México
 - Company verification: Komatsu Mexico's official surface-mining page includes hybrid cable shovels and hydraulic excavators in its broader equipment offering.
 - Company verification: The inspected page does not name a hybrid excavator model or document a Mexican customer delivery.
- 5. KOMATSU DO BRASIL
 - Company verification: Komatsu do Brasil's product catalog identifies the HB205 and explicitly describes its hybrid system.
 - Company verification: The undated catalog supports a Brazilian model-specific portfolio record but does not establish present orderability or recent customer delivery.

- Company verification: Komatsu's Italian catalog advertises the HB365LC/NLC-xx.xx Hybrid excavator and provides a quotation route.

- Company verification: Galadari's official commentary discusses Komatsu hybrid excavators as prospective market introductions.

- Company verification: The inspected statement does not name a locally delivered hybrid model or establish current UAE hybrid sales.

- Company verification: Komatsu's African website identifies Panafrican Equipment (Kenya) Ltd as an official dealer, establishing a Kenyan route to market for Komatsu equipment.

- Company verification: The dealer page does not itself establish availability or delivery of a named hybrid excavator in Kenya.

- Company verification: Komatsu's Africa-facing website publicly promotes its hybrid excavator system.

- Company verification: Regional technology marketing on this page does not establish country-specific model orderability, shipments, or customer deliveries.

- Company verification: Komatsu announced a Japanese remanufacturing business for hybrid-excavator components on November xx.xx 2023.

- **Company verification:** The announcement states that the service covers HB-series hybrid excavators sold and operating in Japan at that time.

- Company verification: Ventia reports commissioning a Komatsu HB365LC-xx.xx Hybrid excavator at its Puketona quarry in New Zealand.

- Company verification: This is buyer-side evidence of an installation; the inspected case study does not supply a publication date or current fleet count.

- Company verification: Komatsu maintains a New Zealand-facing page dedicated to its hybrid excavator offering.

- Company verification: The regional page supports a commercial route to market but does not establish delivered quantities or stock.

Volvo Construction Equipment provides a hydraulic-hybrid alternative through the EC260 Hybrid, EC300 Hybrid, EC370 Hybrid, EC400 Hybrid and EC500 Hybrid crawler portfolio. Its Australia-facing EC500 Hybrid offer specifically emphasizes digging and dumping. ■■■■

[illegible]



That structural promise should not be used to infer hybrid-component coverage or subsequent-owner eligibility. Buyers should compare the quoted machine, service obligations and beneficiary together; the Australian catalog also cautions that features vary between markets and models.

Sources & Evidence

- 1. Who we are | Volvo Construction Equipment Global**
 - Company verification: Volvo Construction Equipment identifies itself as part of Volvo Group and describes its construction-equipment business and international business locations.
 - Company verification: This supports the retained name as a construction-equipment business-level reporting identity, rather than a separately represented Volvo parent.
- 2. Volvo brings hydraulic hybrid technology to new-gen excavators with five new models**
 - Company verification: Volvo Construction Equipment's February xx.xx 2025 announcement, edited July xx.xx 2026, names EC260 Hybrid, EC300 Hybrid, EC370 Hybrid, EC400 Hybrid, and EC500 Hybrid excavators.
- 3. Volvo brings hydraulic hybrid technology to new-gen excavators with five new models | Volvo CE Canada**
 - Company verification: Volvo's Canada-facing announcement lists EC260 Hybrid, EC300 Hybrid, EC370 Hybrid, EC400 Hybrid, and EC500 Hybrid hydraulic hybrid excavators.
 - Company verification: The page records creation on December xx.xx 2024 and editing on October xx.xx 2026.
 - Company verification: It advertises service contracts and financial services for buying or renting; it does not report Canadian deliveries.
- 4. Volvo CE brings hybrid technology to new generation excavators**
 - Company verification: Volvo Construction Equipment's Europe-facing announcement introduces new-generation hydraulic hybrid excavators, supporting a regional commercial portfolio.
- 5. EC360 Hybrid Escavatori cingolati grandi | Volvo CE Italia**
 - Company verification: Volvo's Italian catalog advertises the EC360 Hybrid crawler excavator and provides a commercial contact route.
- 6. Volvo Construction Equipment - Babcock International**
 - Company verification: Babcock states that it supplies Volvo construction equipment and provides sales, parts, and service support in Southern Africa.
 - Company verification: The inspected page establishes a regional channel relationship but does not name a hybrid excavator offered or delivered locally.
- 7. Excavators - Volvo CE Africa**
 - Company verification: Volvo Construction Equipment maintains an Africa-facing excavator catalog covering named crawler, wheeled, and compact excavator offerings.
 - Company verification: The inspected range page does not itself identify Hybrid variants; it therefore does not establish African availability of Volvo's separately evidenced hybrid portfolio.
- 8. EC500 Hybrid Crawler Excavator | Volvo CE Australia**
 - Company verification: Volvo Construction Equipment's Australia-facing catalog offers the EC500 Hybrid crawler excavator with a commercial contact route.
 - Company verification: The page identifies the offering as hydraulic hybrid; it does not establish local deliveries or inventory.
- 9. EC360 Hybrid Crawler Excavator | Volvo CE New Zealand**
 - Company verification: Volvo Construction Equipment's New Zealand-facing catalog offers the EC360 Hybrid crawler excavator with a commercial contact route.
 - Company verification: The catalog establishes a country-facing hydraulic-hybrid offering rather than proof of current customer deliveries.



- 10. CE Engineering Solutions AB and Norrhydro will bring NorrDigi MCC technology to the construction machinery market during spring 2025
 - Company verification: Identifies CE Engineering Solutions as a Volvo CE subsidiary and links the project to Volvo EC300 excavators.

17.3. Hitachi Construction Machinery Co., Ltd.

Both are marked as subject to suspended orders, and interested customers are directed toward rental machines. The series therefore provides a model-specific rental inquiry route, not an unrestricted new-machine supply proposition.

However, the company's separate discontinued-model record lists December 2022 as the Japanese production end for ZH120-xx.xx. These records do not reconcile that model's production chronology, and neither establishes resumed new-order acceptance.

A contractor considering the referral should obtain confirmation of the actual rental model, assignment period and support responsibility before relying on access. An owner planning replacement needs a dated statement of the offered model's commercial disposition rather than an assumption that a retained catalog implies continuing production.

Sources & Evidence

- 1. Company Outline - Hitachi Construction Machinery
 - Company verification: The March xx.xx 2026 company outline identifies Hitachi Construction Machinery Co., Ltd. under the retained official English name and reports its continuing corporate operations.
- 2. ハイブリッドシリーズ - 日立建機日本
 - Company verification: Hitachi's Japanese hybrid-series page identifies ZH120-xx.xx and ZH200-xx.xx states that new orders are suspended, and directs customers to rental machines.

17.4. Kobelco Construction Machinery Co., Ltd.

Kobelco has documented battery-hybrid commercialization, but historical capability must be separated from a replacement offer. Its corporate account records SK80H production and sales beginning in 2009 and introduction of the lithium-ion-battery SK200H-xx.xx in 2016.

A separate Molson account describes supplying an SK210H to Clews Recycling in the United Kingdom and coordinating its customer-specific equipment package.

The undated account does not establish present factory order acceptance, and Japanese model status should not be extrapolated into worldwide withdrawal.

Sources & Evidence

- 1. Company Outline | Company | Kobelco Construction Machinery Global Website**
 - Company verification: The official outline identifies Kobelco Construction Machinery Co., Ltd., names Kobe Steel, Ltd. as its sole stockholder, and describes construction-machinery manufacturing, sales, and service.
 - Company verification: The outline includes employee information as of March xx.xx 2026, supporting continuing operations at the retained operating-company level.
- 2. Kobelco Hybrid Excavator Cuts Fuel Costs for Clews Recycling - Molson**
 - Company verification: Molson describes supplying a Kobelco SK210H hybrid excavator to Clews Recycling and arranging its customer-specific equipment package.
 - Company verification: The inspected customer story supports a commercial supply relationship, but does not establish a reliable publication date or current factory order acceptance.
- 3. Hybrid Excavator | Innovation | Kobelco Construction Machinery Global Website**
 - Company verification: Kobelco describes mass production and sales of SK80H beginning in 2009 and introduction of SK200H-xx.xx in 2016.
- 4. Latin America | Excavators | Kobelco Construction Machinery Global Website**
 - Company verification: Kobelco's Latin American excavator catalog lists conventional models and identifies SK210LC-xx.xx for Colombia and Chile.
 - Company verification: The inspected regional list does not establish a hybrid model's local availability; omission is not proof that no hybrid sales occur.
- 5. Latin America | Contact List Excavators | Kobelco Construction Machinery Global Website**
 - Company verification: Kobelco's official regional contact list identifies Importadora y Comercializadora Maria Auxiliadora Cia Ltda and its Ecuadorian locations.
 - Company verification: The listing establishes a local excavator distribution route, not hybrid-specific orderability.
- 6. excavadora-hibrida-kobelco-sk210-h-aldimak-40-min | Kobelco**
 - Company verification: ICMA's Ecuadorian website retains a May xx.xx 2020 media page labeled with a Kobelco SK210 hybrid reference.
 - Company verification: The inspected page is an image/media reference rather than an adequate product-order or customer-delivery record.
- 7. KOBELCO Hibrit Teknolojisi**
 - Company verification: HASEL's official Turkish commercial page promotes the Kobelco SK210HLC-xx.xx hybrid excavator.
 - Company verification: The page identifies a Turkish HASEL business contact, supporting regional marketing-channel presence but not current deliveries or stock.

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1. 山河智能装备股份有限公司 2025 年年度报告全文

- ## 17.6. SANY Group

The product description establishes an offering, not a named delivery or independently demonstrated customer benefit. Comparison should remain tied to the offered configuration and support package; the Indian relationship does not establish fulfillment elsewhere.

Sources & Evidence

[1. About Us | Construction Equipment Manufacturer | Sany India](#)

- Company verification: SANY India's business page identifies SANY Heavy Industry India Pvt. Ltd. and its Pune business location.
- Company verification: The page identifies SANY India as a SANY Group subsidiary, providing a business-level attribution path for the captured Indian excavator offering.
- Company verification: General SANY equipment population and channel figures do not establish hybrid-excavator scale.

2. Sany-SY260C-10HD-GENe - Hydraulic Excavator | Sany India

- Company verification: SANY India advertises the SY260C-10HD GENe hydraulic excavator with a feature explicitly named potential-energy hybrid power recovery.

17.7. SENNEBOGEN

SENNEBOGEN provides a specialist material-handling proposition through the xx.xx E Hybrid. Its portfolio advertises Green Hybrid energy recovery, mobile and crawler configurations, and diesel or electric drive variants for continuous bulk and general-cargo handling. ■■■■■■

identifies Schlüter Baumaschinen as the sales and service partner supporting procurement. This supplies a named configuration, customer and channel relationship, although the reported operating advantages remain a supplier account rather than independently established results.

Handling-equipment buyers should compare the actual wheeled or crawler configuration, assigned task and responsible service partner. The offering is not an interchangeable substitute for every general excavation assignment. ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■

Sources & Evidence

1. Aviso legal | SENNEBOGEN

- Company verification: SENNEBOGEN's official legal notice identifies SENNEBOGEN Maschinenfabrik GmbH in Straubing and provides commercial-register reference HRB xx.xx.
- Company verification: This supports the legal operator behind the retained SENNEBOGEN market-facing identity.

2. Gravel plant reduces fuel consumption by 60 percent with the SENNEBOGEN 855 E Hybrid

- Company verification: SENNEBOGEN's June xx.xx 2026 customer record describes an xx.xx E Hybrid material-handling excavator commissioned for gravel extraction in Germany in January 2025.

Fujian SouthChina Heavy Machinery Manufacture Co., Ltd. is associated with the SOCMA brand in its company-issued brochure. SOCMA's product advertisement identifies HNE130W-EE as a wheeled excavator powered by a lithium battery and engine and provides an inquiry route.

The product page uses the name Fujian SOCMA Machinery Manufacture Co., Ltd., whereas the brochure uses the captured SouthChina name. The materials establish a brand association, not registry-backed equivalence between contracting entities. ■■■■■ ■■■■■■■■■■ ■■■■■

1. SOCMA company brochure

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18. Companies Covered

Table 344. Global Hybrid Excavators Market, Companies Covered

Company
ASALIFT S.R.L.
Caterpillar Inc.
Danfoss
DMS Technologie GmbH
EDM e-mobility
Fujian SouthChina Heavy Machinery Manufacture Co., Ltd.
Guizhou Zhanyang Dongli Zhonggong Youxian Gongsi
HD Hyundai
HeavyTech, Inc.
HEVTEC
Hitachi Construction Machinery Co., Ltd.
Huddig AB
Kobelco Construction Machinery Co., Ltd.
Komatsu Ltd.
Kubota Corporation
Liebherr
Lishide Construction Machinery Co., Ltd.
LiuGong
Mantsinen Group
Mantsinen Group Ltd
Mantsinen Group Ltd Oy
Mecalac
Nasta AS
New Holland Construction
NG Attachments
Norrhydro Group Plc
PUNCH Flybrid
SANY Group
SENNEBOGEN
Sichuan Bonny Heavy Machinery Co., Ltd.

Table 344 - continued

Company
STW
Sumitomo (S.H.I.) Construction Machinery Co., Ltd.
Sunward
Takeuchi
Terex Corporation
Terex Deutschland GmbH
V. Løwener A/S
Volvo Construction Equipment
Wacker Neuson
Wilhelm Schäfer GmbH
Wolva Group
XCMG
Zeppelin Maquinaria
Zoomlion

Sources & Evidence

1. Company info | About us | Komatsu global site

- Company verification: The corporate profile, dated April xx.xx 2026, identifies Komatsu Ltd. and its continuing manufacturing and sales business in construction and mining machinery.

2. Same job, less fuel: rising costs put hybrid excavators back in focus

- Company verification: Komatsu's September xx.xx 2026 Australian business article identifies HB215LC-xx.xx and HB365LC-xx.xx as its hybrid excavator range.
- Company verification: The article reports continuing use of Komatsu hybrid machines by Australian customer Divall's Earthmoving, supporting an established commercial fleet role rather than exhibition-only activity.

3. Who we are | Volvo Construction Equipment Global

- Company verification: Volvo Construction Equipment identifies itself as part of Volvo Group and describes its construction-equipment business and international business locations.
- Company verification: This supports the retained name as a construction-equipment business-level reporting identity, rather than a separately represented Volvo parent.

4. Company Outline - Hitachi Construction Machinery

- Company verification: The March xx.xx 2026 company outline identifies Hitachi Construction Machinery Co., Ltd. under the retained official English name and reports its continuing corporate operations.

5. Cat 336E H Hybrid Large Excavators | Caterpillar

- Company verification: Caterpillar explicitly labels the 336E H Hybrid model record Non-Current.
- Company verification: The retained model record therefore establishes a historical hydraulic-hybrid portfolio, not current new-machine orderability.
- Company verification: Caterpillar's model record identifies the Cat 336E H Hybrid excavator and its hydraulic hybrid swing energy-recovery offering.

6. Company Outline | Company | Kobelco Construction Machinery Global Website

- Company verification: The official outline identifies Kobelco Construction Machinery Co., Ltd., names Kobe Steel, Ltd. as its sole stockholder, and describes construction-machinery manufacturing, sales, and service.
- Company verification: The outline includes employee information as of March xx.xx 2026, supporting continuing operations at the retained operating-company level.

7. Kobelco Hybrid Excavator Cuts Fuel Costs for Clews Recycling - Molson

- Company verification: Molson describes supplying a Kobelco SK210H hybrid excavator to Clews Recycling and arranging its customer-specific equipment package.
- Company verification: The inspected customer story supports a commercial supply relationship, but does not establish a reliable publication date or current factory order acceptance.

8. SH200HB-7 | 住友建機株式会社

- Company verification: Sumitomo retains a specific official SH200HB-xx.xx hybrid product record and downloadable catalog.
- Company verification: The inspected record is under a legacy product-page route and does not expressly confirm present production or order acceptance.

9. 山河智能装备股份有限公司 2025 年年度报告全文

- Company verification: The 2025 annual report identifies the listed issuer as SUNWARD INTELLIGENT EQUIPMENT CO., LTD., with SUNWARD as its abbreviated English name.
- Company verification: The filing documents continuing fiscal-2025 operations and identifies Guangzhou municipal government as the actual controller, resolving the assumption that private ownership could be inferred from the brand.

10. Terex Corporation - Form 10-K for the year ended December 31, 2025

- Company verification: Terex Corporation's 2025 Form xx.xx-K identifies Fuchs among the brands and business lines of its Materials Processing business.
- Company verification: The filing establishes parent-level portfolio attribution, not a second independent Fuchs manufacturer.
- Company verification: The filing's Fuchs portfolio attribution provides parent-level context for the separately retained Terex Deutschland GmbH operating-company representation.
- Company verification: It does not provide separately attributable F120 MH revenue for that operating company.

11. Terex Corporation - Subsidiaries, Exhibit 21.1 to the 2025 Form 10-K

- Company verification: The subsidiary exhibit accompanying Terex Corporation's 2025 annual filing lists Terex Deutschland GmbH in Germany.
- Company verification: The mandatory subsidiary exhibit establishes Terex Deutschland GmbH within Terex Corporation's reporting group.
- Company verification: Together with the captured Fuchs commercial materials, this confirms overlapping parent and operating-company representations rather than independent competing OEMs.

12. Aviso legal | SENNEBOGEN

- Company verification: SENNEBOGEN's official legal notice identifies SENNEBOGEN Maschinenfabrik GmbH in Straubing and provides commercial-register reference HRB xx.xx.
- Company verification: This supports the legal operator behind the retained SENNEBOGEN market-facing identity.

13. About Huddig | History and Operations

- Company verification: Huddig identifies its business as developing, manufacturing, and selling excavator loaders through authorized commercial and service channels.
- Company verification: Its official history records delivery of a HUDDIG 1370T TIGON hybrid excavator loader in the United States in 2023.
- Company verification: That historical delivery does not establish shipments of the separately advertised September 2026 TIGON G2 offering.

14. About Us | Construction Equipment Manufacturer | Sany India

- Company verification: SANY India's business page identifies SANY Heavy Industry India Pvt. Ltd. and its Pune business location.
- Company verification: The page identifies SANY India as a SANY Group subsidiary, providing a business-level attribution path for the captured Indian excavator offering.
- Company verification: General SANY equipment population and channel figures do not establish hybrid-excavator scale.

15. Contactez-nous | NG Attachments

- Company verification: The official contact page names NG Attachments Makina Dış Ticaret AŞ and identifies its business location in OSTİM, Ankara, Turkey.
- Company verification: The page uses Nur Group email addresses; registry confirmation of the legal naming and group relationship remains unresolved.
- Company verification: The contact record establishes geographic and self-reported operator attribution, not a delivered hybrid-conversion project.

16. DUMAREY FLYBRID LIMITED overview - Find and update company information - GOV.UK

- Company verification: Companies House identifies company xx.xx as active DUMAREY FLYBRID LIMITED.
- Company verification: The registry records PUNCH FLYBRID LIMITED as its previous name through January xx.xx 2024.
- Company verification: The protected PUNCH Flybrid title is therefore a former-name representation, not the current registered company name.

17. HeavyTech, Inc. - Form C crowdfunding disclosure

- Company verification: HeavyTech's issuer-hosted Form C identifies the HT-xx.xx Mini-Excavator as a planned hybrid and electric offering.
- Company verification: The filing states that development was announced in the first quarter of 2025 and that availability was expected in late 2025 to early 2026.
- Company verification: The disclosure describes development funding and a related-party powertrain arrangement; it does not establish that the planned launch, customer orders, or deliveries occurred.

18. HD Hyundai to Merge Construction Equipment Divisions to Form New Company - HD Construction Equipment

- Company verification: The official North American announcement describes the combination of HD Hyundai Construction Equipment and HD Hyundai Infracore, with an announced effective date of January xx.xx 2026.
- Company verification: It states that Hyundai and Develon would retain distinct North American dealer, parts, and service structures.
- Company verification: This announcement supports the intended reporting relationship but is not a mandatory record proving completed legal merger terms or a released hybrid excavator.

19. HB365LC-3 hybrid hydraulic excavator - Drive performance, fuel efficiency and sustainability

- Company verification: Komatsu's HB365LC-xx.xx sales sheet offers a hybrid hydraulic excavator with an electrical swing system and directs buyers to local distributors.

20. Volvo brings hydraulic hybrid technology to new-gen excavators with five new models

- Company verification: Volvo Construction Equipment's February xx.xx 2025 announcement, edited July xx.xx 2026, names EC260 Hybrid, EC300 Hybrid, EC370 Hybrid, EC400 Hybrid, and EC500 Hybrid excavators.

21. ハイブリッドシリーズ - 日立建機日本

- Company verification: Hitachi's Japanese hybrid-series page identifies ZH120-xx.xx and ZH200-xx.xx states that new orders are suspended, and directs customers to rental machines.

22. Hybrid Excavator | Innovation | Kobelco Construction Machinery Global Website

- Company verification: Kobelco describes mass production and sales of SK80H beginning in 2009 and introduction of SK200H-xx.xx in 2016.

23. SH200HB / SH220HBL アクティブ ハイブリッドショベル

- Company verification: Sumitomo's official catalog identifies SH200HB and SH220HBL as active hybrid excavator offerings.

24. Sumitomo Heavy Industries, Ltd. Annual Report 2013

- Company verification: Sumitomo Heavy Industries' 2013 annual report identifies Sumitomo (S.H.I.) Construction Machinery Co., Ltd. within its construction-machinery subsidiaries and announces planned hybrid excavator sales in autumn 2013.

25. Mining Game Changer 2026: XCMG Offers Complete Zero-Emission Solution Package

- Company verification: XCMG's Indonesian business announcement identifies the XE650EK hybrid excavator among equipment displayed at a South Kalimantan mining event on February xx.xx 2026.

26. 为实现“双碳”目标贡献力量！山河智能混合动力挖掘机项目入围又一全国重要赛事总决赛

- Company verification: Sunward's December xx.xx 2022 business announcement names SWE600FES and reports hydraulic hybrid excavator deliveries to mining customers in Inner Mongolia, Shanxi, and Gansu.

27. About us-Sunward International

- Company verification: Sunward's English company profile identifies its excavator portfolio and international business presence; this is not model-specific export evidence.

28. Sany-SY260C-10HD-GENe - Hydraulic Excavator | Sany India

- Company verification: SANY India advertises the SY260C-10HD GENe hydraulic excavator with a feature explicitly named potential-energy hybrid power recovery.

29. Hybrid excavators - Takeuchi

- Company verification: Takeuchi-branded TB210RH and TB216SH are advertised as diesel/electric dual-power hybrid excavators in the regional catalog.
- Company verification: The catalog identifies Wilhelm Schäfer GmbH as its business contact and advertises regional hybrid excavator sales and leasing.

30. Escavadeira de esteira 803 | Wacker Neuson

- Company verification: Wacker Neuson's Latin American xx.xx catalog offers an optional electro-hydraulic power unit alongside diesel operation, including enclosed and urban applications.
- Company verification: The Latin American Portuguese-language xx.xx product page cautions that displayed equipment and data may differ from the current delivery program in an individual country.
- Company verification: A regional catalog listing therefore does not independently confirm Brazilian availability.

31. The Mecalac Group

- Company verification: Mecalac's official history records the 12MTX Hybrid's 2009 Intermat awards and states that Mecalac joined Fayat Group in 2025.

32. Competing With World-class Enterprises: LiuGong Showcases Full Lineup of World-class Products at bauma China 2010

- Company verification: LiuGong's issuer press release identifies the CLG922D hybrid excavator among new products exhibited at bauma China 2010; it does not establish current availability.

33. Gravel plant reduces fuel consumption by 60 percent with the SENNEBOGEN 855 E Hybrid

- Company verification: SENNEBOGEN's June xx.xx 2026 customer record describes an xx.xx E Hybrid material-handling excavator commissioned for gravel extraction in Germany in January 2025.

34. Kubota Introduces Electric Mini Excavator in Europe

- Company verification: Kubota's December xx.xx 2023 release announces the electric KX038-4e for Europe and discusses broader future hybrid-drive development, not a marketed hybrid excavator.

35. Mantsinen Group - Frontrunner In Material Handling

- Company verification: Mantsinen describes itself as a family-owned company with material-handling machinery and logistics-services businesses.
- Company verification: The company states that its material handlers are manufactured in Eastern Finland and delivered through a dealer network; its English site uses Mantsinen Group Ltd.

36. MANTSINEN 300 HYBRILIFT® - Built for Tough Tasks

- Company verification: The manufacturer's U.S.-formatted brochure advertises the Mantsinen xx.xx HybriLift material handler for ports and industrial terminals.
- Company verification: The named offering includes HybriLift energy storage and recovery; it is a material-handler offering rather than evidence of a conventional earthmoving-excavator sale.
- Company verification: The brochure does not establish a named U.S. customer delivery.

37. F120 MH

- Company verification: Fuchs publicly offers the F120 MH material handler with the named Fuchs Blue Hybrid System.
- Company verification: The product page identifies tracked and other undercarriage configurations and port-handling applications.
- Company verification: Its legal notice names Terex Deutschland GmbH and identifies Terex Corporation as the registered-trademark owner; definitive economic reporting attribution remains unresolved.
- Company verification: The Fuchs product portfolio advertises the F120 MH material handler with its Blue Hybrid System.
- Company verification: The Fuchs F120 MH catalog advertises a material handler with the named Blue Hybrid System and diesel or electric drive options; exact reporting-entity attribution remains unresolved.
- Company verification: Supports the named F120 MH Blue Hybrid offering associated with the retained Fuchs operating-company lead.

38. Richard Currie Joins Fuchs North America as Sales Director of Key Accounts

- Company verification: The April xx.xx 2026 announcement documents Fuchs' North American sales organization and engagement with regional recycling customers.
- Company verification: It states that Fuchs material handlers for North America are designed and manufactured in Germany.
- Company verification: The announcement establishes regional business presence, not F120 MH-specific deliveries.

39. Volvo brings hydraulic hybrid technology to new-gen excavators with five new models | Volvo CE Canada

- Company verification: Volvo's Canada-facing announcement lists EC260 Hybrid, EC300 Hybrid, EC370 Hybrid, EC400 Hybrid, and EC500 Hybrid hydraulic hybrid excavators.
- Company verification: The page records creation on December xx.xx 2024 and editing on October xx.xx 2026.
- Company verification: It advertises service contracts and financial services for buying or renting; it does not report Canadian deliveries.

40. Minería Superficie | Komatsu México

- Company verification: Komatsu Mexico's official surface-mining page includes hybrid cable shovels and hydraulic excavators in its broader equipment offering.
- Company verification: The inspected page does not name a hybrid excavator model or document a Mexican customer delivery.

41. Mantsinen Group - Company

- Company verification: Identifies Mantsinen Group Ltd Oy as a family-owned business manufacturing material handlers in Eastern Finland and supplying them through an international dealer network.
- Company verification: Explicitly identifies Mantsinen Group Ltd Oy and a material-handling machinery business with worldwide dealer distribution.
- Company verification: The corporate page uses Mantsinen Group Ltd Oy and the shorter Mantsinen Group Ltd presentation for its family-owned Finnish business.
- Company verification: Supports Mantsinen Group as a corporate-name presentation, not a separately established manufacturer.

- 42. MANTSINEN GROUP CELEBRATES ITS 60TH ANNIVERSARY WITH THE LARGEST ORDER IN THE COMPANY'S HISTORY**
- Company verification: The June xx.xx 2023 announcement connects HybriLift-equipped machines to Suzano's Brazilian equipment order.
 - Company verification: Reports material-handler presence in Brazil, Uruguay, and Chile, regional spare-parts stock in Uruguay, and Brazilian dealer/service support through JT Partners.
- 43. Imprint**
- Company verification: The Fuchs website imprint identifies Terex Deutschland GmbH as its legal publisher and provides German registry details.
 - Company verification: This establishes the observed legal identity behind the inspected commercial materials, not independently verified manufacturing or revenue attribution.
- 44. The beginning of a new era - F120 MH**
- Company verification: The September xx.xx 2023 Fuchs launch identifies the F120 MH port material handler with a Blue Hybrid energy-recovery system.
 - Company verification: The announcement establishes a named commercial hybrid material-handler offering, not a Latin American delivery.
- 45. Contact person | Terex Fuchs**
- Company verification: Fuchs' official contact page assigns a regional sales manager to Latin America and Brazil.
 - Company verification: The regional sales assignment does not establish country-specific F120 MH sales or deliveries.
- 46. KOMATSU DO BRASIL**
- Company verification: Komatsu do Brasil's product catalog identifies the HB205 and explicitly describes its hybrid system.
 - Company verification: The undated catalog supports a Brazilian model-specific portfolio record but does not establish present orderability or recent customer delivery.
- 47. FERREYROS PRESENTA EXCAVADORA HÍBRIDA QUE REUTILIZA ENERGÍA PARA AHORRAR COMBUSTIBLE | Ferreyros**
- Company verification: Ferreyros' February xx.xx 2017 notice introduces Caterpillar's Cat 336D2 L XE hydraulic hybrid excavator in Peru.
 - Company verification: The notice reports the model operating in Peru's northern highlands, supporting historical local commercialization rather than current new-machine availability.
- 48. Latin America | Excavators | Kobelco Construction Machinery Global Website**
- Company verification: Kobelco's Latin American excavator catalog lists conventional models and identifies SK210LC-xx.xx for Colombia and Chile.
 - Company verification: The inspected regional list does not establish a hybrid model's local availability; omission is not proof that no hybrid sales occur.
- 49. Latin America | Contact List Excavators | Kobelco Construction Machinery Global Website**
- Company verification: Kobelco's official regional contact list identifies Importadora y Comercializadora Maria Auxiliadora Cia Ltda and its Ecuadorian locations.
 - Company verification: The listing establishes a local excavator distribution route, not hybrid-specific orderability.
- 50. excavadora-hibrida-kobelco-sk210-h-aldimak-40-min | Kobelco**
- Company verification: ICMA's Ecuadorian website retains a May xx.xx 2020 media page labeled with a Kobelco SK210 hybrid reference.
 - Company verification: The inspected page is an image/media reference rather than an adequate product-order or customer-delivery record.

- 51. Umbaulösungen // DMS**
 - Company verification: DMS publicly advertises a hybrid conversion kit for compact and mini-excavators, developed with Takeuchi.
 - Company verification: DMS identifies Takeuchi as its collaborator for the advertised hybrid conversion kit.
- 52. Impressum // DMS**
 - Company verification: The official imprint identifies DMS Technologie GmbH in Fürth, Germany, and provides its commercial-register reference.
- 53. Kubota U17-3 el hybrid minigraver 1,7 t - Løwener sælger kun de bedste maskiner**
 - Company verification: The Danish catalog offers the Kubota U17-3EL hybrid mini-excavator and identifies V. Løwener A/S as the construction-equipment business.
 - Company verification: Løwener advertises a Kubota-branded U17-3EL diesel/mains variant; the listing does not establish Kubota's authorship of the conversion.
- 54. Huddig 1370T | A full hybrid with no compromises**
 - Company verification: Huddig's current product page advertises the HUDDIG xx.xx TIGON G2 hybrid and states that its launch broadcast occurred on September xx.xx 2026.
- 55. FI20 MH - IM ARBEITSALLTAG ANGEKOMMEN**
 - Company verification: Fuchs documents FI20 MH customer operation in Germany and identifies its Blue Hybrid System, supporting an actual specialist commercial-use role.
- 56. Giant in Plochingen: first Liebherr LH 150 material handler with electric drive in an inland port**
 - Company verification: Liebherr reports an LH xx.xx C High Rise Industry material handler with electric drive and its standard ERC system operating at Plochingen, Germany, since June 2018.
- 57. Empresa - Zeppelin Maquinaria**
 - Company verification: Zeppelin Maquinaria's official business page describes Zeppelin as a brand originating in Spain in 2010.
- 58. Zeppelin Pincher 400V Hybrid Electric Mini Excavator**
 - Company verification: Intermaquinas' sales catalog offers a Zeppelin Pincher Hybrid gasoline/mains mini-excavator, subject to a stock check; it does not establish the underlying manufacturer.
- 59. Volvo CE brings hybrid technology to new generation excavators**
 - Company verification: Volvo Construction Equipment's Europe-facing announcement introduces new-generation hydraulic hybrid excavators, supporting a regional commercial portfolio.
- 60. EC360 Hybrid Escavatori cingolati grandi | Volvo CE Italia**
 - Company verification: Volvo's Italian catalog advertises the EC360 Hybrid crawler excavator and provides a commercial contact route.
- 61. Komatsu Escavatore Ibrido Cingolato HB365LC-3 HB365NLC-3**
 - Company verification: Komatsu's Italian catalog advertises the HB365LC/NLC-xx.xx Hybrid excavator and provides a quotation route.
- 62. Utslippsfrie anleggsmaskiner**
 - Company verification: Nasta advertises ZERON excavators using battery and/or cable-electric power. This establishes an electric-conversion portfolio, not core hybrid participation.
- 63. EDM e-mobility | İş Makinaları Elektrikli Dönüşüm | GEPOSB / Türkiye**
 - Company verification: EDM e-mobility advertises excavator conversion services that it describes as hybrid, alongside its broader electric-conversion business.
 - Company verification: The advertised conversion role is distinct from manufacturing the underlying OEM excavator; a named delivered hybrid project is not established.
- 64. İletişim | EDM e-mobility | İş Makinaları Elektrikli Dönüşüm | GEPOSB / Türkiye**
 - Company verification: The official contact page identifies EDM Dış Ticaret Makina Sanayi Ticaret Anonim Şirketi and its Gebze/Kocaeli, Turkey, business address.
 - Company verification: The page offers business contact for construction-machinery electric-conversion services.

65. HİDROLİK ATAŞMAN TESİSAT KİTLERİ | NG Attachments - Excavator & Loader Attachments

- Company verification: NG Attachments publicly offers diesel-electric hybrid conversion kits for compact and mini excavators.
- Company verification: Its catalog presents a conversion-kit and auxiliary-power offering rather than a separately branded complete excavator.

66. Material Handlers - Mantsinen

- Company verification: Mantsinen's official commercial portfolio offers hydraulic material handlers with the named HybriLift energy-recovery system.
- Company verification: The portfolio identifies port, terminal, and bulk-material handling applications; it does not establish conventional earthmoving-excavator classification.
- Company verification: The official page identifies Mantsinen Group Ltd in its copyright attribution.

67. Mantsinen Material Handlers - NEFTAŞ

- Company verification: NEFTAŞ's Turkish-language commercial catalog advertises Mantsinen material handlers and their HybriLift energy-recovery offering.
- Company verification: The catalog supplies a regional channel lead but does not independently establish dated Turkish deliveries.

68. KOBELCO Hibrit Teknolojisi

- Company verification: HASEL's official Turkish commercial page promotes the Kobelco SK210HLC-xx.xx hybrid excavator.
- Company verification: The page identifies a Turkish HASEL business contact, supporting regional marketing-channel presence but not current deliveries or stock.

69. Powering the Nation | Galadari Trucks and Heavy equipment-market share

- Company verification: Galadari's official commentary discusses Komatsu hybrid excavators as prospective market introductions.
- Company verification: The inspected statement does not name a locally delivered hybrid model or establish current UAE hybrid sales.

70. Caterpillar Unveils First Hybrid Excavator

- Company verification: Al-Bahar's official archive reproduces Caterpillar's announcement of the Cat 336E H hydraulic hybrid excavator.
- Company verification: The announcement describes planned February 2013 ordering and March 2013 factory shipments, not demonstrated current Gulf availability or local deliveries.

71. About Us - Lishide

- Company verification: The company identifies itself in English as Lishide Construction Machinery Co., Ltd. and gives its business location in Linshu County, Shandong Province, China.
- Company verification: The company describes its commercial business as manufacturing hydraulic excavators, including electric, energy-saving, and customized excavator offerings.
- Company verification: The company identifies itself as Lishide Construction Machinery Co., Ltd., based in Linshu County, Shandong, China.
- Company verification: Its stated business includes manufacturing hydraulic, electric, and energy-saving excavators.

72. SC240.10ES (fuel-electric hybrid energy-saving excavator) - Lishide

- Company verification: Lishide publicly advertises the named SC240.10ES fuel-electric hybrid energy-saving excavator.
- Company verification: The product description identifies conventional diesel and electric power with switching between power sources; it does not establish an African delivery or resolve comparability with stored-energy hybrid excavators.

73. Panafrican Equipment Kenya Ltd - Komatsu

- Company verification: Komatsu's African website identifies Panafrican Equipment (Kenya) Ltd as an official dealer, establishing a Kenyan route to market for Komatsu equipment.
- Company verification: The dealer page does not itself establish availability or delivery of a named hybrid excavator in Kenya.

74. Komatsu Hybrid Technology

- Company verification: Komatsu's Africa-facing website publicly promotes its hybrid excavator system.
- Company verification: Regional technology marketing on this page does not establish country-specific model orderability, shipments, or customer deliveries.

75. Volvo Construction Equipment - Babcock International

- Company verification: Babcock states that it supplies Volvo construction equipment and provides sales, parts, and service support in Southern Africa.
- Company verification: The inspected page establishes a regional channel relationship but does not name a hybrid excavator offered or delivered locally.

76. Excavators - Volvo CE Africa

- Company verification: Volvo Construction Equipment maintains an Africa-facing excavator catalog covering named crawler, wheeled, and compact excavator offerings.
- Company verification: The inspected range page does not itself identify Hybrid variants; it therefore does not establish African availability of Volvo's separately evidenced hybrid portfolio.

77. Dual power excavator - Lishide

- Company verification: Lishide's dual-power catalog lists SC240.10ES under a fuel-electric hybrid description and also lists SC560.10ES Dual Power Excavator.
- Company verification: Both catalog entries carry April xx.xx 2024 dates; their presence establishes advertised offerings, not delivered sales.

78. SOCMA company brochure

- Company verification: The company-issued brochure identifies Fujian SouthChina Heavy Machinery Manufacture Co., Ltd. and the SOCMA brand.
- Company verification: It places the company's headquarters in Quanzhou, Fujian, China, and describes a construction-equipment manufacturing and sales business.

79. Hybrid-Excavator Lithium Battery And Engine - Southchina Machinery

- Company verification: SOCMA advertises a wheeled excavator powered by a lithium battery and engine.
- Company verification: The offering page identifies HNE130W-EE as an extended-power model and provides a commercial inquiry route.
- Company verification: The undated page does not establish customer deliveries or current inventory.

80. BONNY CES490-8 dual-power excavator supplier catalog

- Company verification: The company-named seller catalog identifies Sichuan Bonny Heavy Machinery Co., Ltd., Sichuan, China, and advertises CES490-xx.xx as a dual-power hydraulic excavator.
- Company verification: The seller describes selectable diesel/electric operation, supporting a dual-power offering rather than establishing a stored-energy hybrid category.
- Company verification: This supplier-presented catalog does not establish customer deliveries, current ownership, or independent confirmation of availability.

81. 混合动力挖掘机实验样机平台 - 仪器详情

- Company verification: Zhejiang University's equipment record identifies Zoomlion's Shanghai branch as the manufacturer associated with a ZE205E-Hybrid experimental excavator platform.
- Company verification: The acquisition date is December xx.xx 2012.
- Company verification: The record supports historical prototype participation, not current marketed availability.

82. 企业年鉴_关于中联_中联重科股份有限公司

- Company verification: The official corporate yearbook identifies the company as 中联重科股份有限公司.
- Company verification: This company record supplements the university's branch-level manufacturer attribution but does not establish a current hybrid product.

83. 2024 年 5 月非道路移动机械环保信息公开

- Company verification: China's May 2024 non-road machinery environmental disclosure identifies 贵州詹阳动力重工有限公司 and model JYL621H.
- Company verification: The record classifies JYL621H as a wheeled hydraulic excavator without labeling it hybrid.
- Company verification: The disclosure therefore establishes a dated entity/model association, not continuation of the historical hybrid configuration.

84. History : HD CONSTRUCTION EQUIPMENT

- Company verification: The operating-business history records establishment of HD Construction Equipment in January 2026.
- Company verification: The site identifies HD Construction Equipment as an affiliate of HD Hyundai.
- Company verification: This improves successor-business attribution without requiring a separately keyed competitor.

85. Brand Communication : HD CONSTRUCTION EQUIPMENT

- Company verification: The official exhibition history reports that HD Hyundai Infracore displayed an excavator with a hybrid engine at BAUMA.
- Company verification: The inspected passage does not identify a currently orderable hybrid model or establish South Korean sales.

86. Hydraulic Excavators | Sumitomo Heavy Industries, Ltd.

- Company verification: Sumitomo Heavy Industries identifies SH200HB-xx.xx as a hybrid excavator on its product page.
- Company verification: The page directs commercial inquiries to Sumitomo Construction Machinery.
- Company verification: The undated page strengthens named portfolio support but does not confirm current production or order acceptance.

87. Starting Reman business of hybrid hydraulic excavator components in Japan

- Company verification: Komatsu announced a Japanese remanufacturing business for hybrid-excavator components on November xx.xx 2023.
- Company verification: The announcement states that the service covers HB-series hybrid excavators sold and operating in Japan at that time.

88. Komatsu Hybrid excavator joins Ventia's green fleet

- Company verification: Ventia reports commissioning a Komatsu HB365LC-xx.xx Hybrid excavator at its Puketona quarry in New Zealand.
- Company verification: This is buyer-side evidence of an installation; the inspected case study does not supply a publication date or current fleet count.

89. Komatsu hybrid excavators | Komatsu New Zealand

- Company verification: Komatsu maintains a New Zealand-facing page dedicated to its hybrid excavator offering.
- Company verification: The regional page supports a commercial route to market but does not establish delivered quantities or stock.

90. EC500 Hybrid Crawler Excavator | Volvo CE Australia

- Company verification: Volvo Construction Equipment's Australia-facing catalog offers the EC500 Hybrid crawler excavator with a commercial contact route.
- Company verification: The page identifies the offering as hydraulic hybrid; it does not establish local deliveries or inventory.

91. EC360 Hybrid Crawler Excavator | Volvo CE New Zealand

- Company verification: Volvo Construction Equipment's New Zealand-facing catalog offers the EC360 Hybrid crawler excavator with a commercial contact route.
- Company verification: The catalog establishes a country-facing hydraulic-hybrid offering rather than proof of current customer deliveries.

92. Asalift-profil-de

- Company verification: The company-authored profile identifies Asalift Srl and advertises ZainoMotore mini-excavator conversions.
- Company verification: The profile supplies an Italian business address and commercial contact for the offering.

93. Nasta ZE690 - HEVTEC

- Company verification: Names Nasta ZE690 Grid-Battery Electric as a Hevtec integration reference and reports a December 2024 Norwegian customer delivery.
- Company verification: Identifies Nasta's Hitachi-based ZE690 grid/battery excavator conversion.

94. Independent System Integrator for NRMM | Hevtec

- Company verification: Identifies Hevtec Oy as a Finnish mobile-machinery electrification and system-integration business.

95. Hybrid Excavators May Curb Fuel and Smog

- Company verification: The January xx.xx 2007 report corroborates New Holland's HE-xx.xx prototype exhibition activity in North America, not commercial launch.

96. Fuchs Port Line brochure - April 2026

- Company verification: The April 2026 Fuchs Port Line brochure carries Terex Corporation trademark attribution and includes the Blue Hybrid portfolio.
- Company verification: The same brochure names Terex Deutschland GmbH as the business contact for the Fuchs portfolio.

97. NorrDigi MCC is intelligent, energy-saving hydraulic solution

- Company verification: Advertises the NorrDigi MCC hydraulic platform and identifies a Volvo EC300E excavator reference.
- Company verification: Establishes an excavator-specific platform-supplier role without proving current production-machine deliveries.

98. Norrhydro Group investor pages

- Company verification: The official investor presentation identifies Norrhydro Group Plc and its Finnish hydraulic-solutions business.

99. CE Engineering Solutions AB and Norrhydro will bring NorrDigi MCC technology to the construction machinery market during spring 2025

- Company verification: Names Norrhydro and CE Engineering Solutions in an announced NorrDigi excavator commercialization partnership.
- Company verification: The stated spring-2025 introduction is a plan, not evidence that commercial deliveries occurred.
- Company verification: Identifies CE Engineering Solutions as a Volvo CE subsidiary and links the project to Volvo EC300 excavators.

100. Norrhydro Group plc's ceo review

- Company verification: The CEO review discusses continuing NorrDigi MCC testing and commercialization work during 2026.
- Company verification: Its date labeling is inconsistent, so it is not used as a precisely dated confirmation of current commercial availability.

101. Field trial of new Danfoss Dextreme system in Volvo excavators expected to show greater productivity, reduction in fuel use

- Company verification: Danfoss reports field trials of its named Dextreme platform in Volvo excavators.
- Company verification: The stated platform applicability includes diesel, hybrid, and electric excavators; this does not establish a delivered production hybrid model.

102. Maximum machine efficiency and optimized drive design: An intelligent control solution for flywheel energy storage systems

- Company verification: STW's March xx.xx 2023 announcement identifies PUNCH Flybrid as its PP200 controller customer and discusses excavators among flywheel applications.
- Company verification: STW identifies its ESX.3cs controller supply relationship for PUNCH Flybrid's PP200 system.

103. HD건설기계 - [정정]분기보고서 (2026.03)

- Company verification: The corrected first-quarter 2026 filing explicitly reports completion of the merger with HD Hyundai Infracore on January xx.xx 2026, establishing a completed transaction rather than merely an announced combination. ([kind.krx.co.kr](https://kind.krx.co.kr/external/2026/xx.xx/xx.xx/xx.xx/xx.xx/xx.xx.htm))
- Company verification: The filing identifies HD Hyundai XiteSolution as the operating company's largest shareholder and HD Hyundai as XiteSolution's owner.
- Company verification: The corporate transaction and ownership disclosures do not establish a released hybrid excavator or hybrid-specific sales.

104. Interim report of Norrhydro Group Plc Q1 2026 : Growth continued profitably during the review period

- Company verification: Norrhydro's April xx.xx 2026 unaudited interim release describes continuing NorrDigi MCC excavator development, providing a consistently dated commercial-status record. ([view.news.eu.nasdaq.com](https://view.news.eu.nasdaq.com/view?id=b0d8f9ddc0187995e1e99f0e1b4612e68&lang=en&src=micro))
- Company verification: The release describes further precommercial work; it does not establish accepted excavator orders or customer deliveries.

105. Half-year report (January-June 2026) of Norrhydro Group Plc: Gradual Market Recovery and Strong Operational Performance Support the Company's Growth

- Company verification: The July xx.xx 2026 half-year release establishes continuing Norrhydro Group Plc operations in hydraulic cylinders and motion-control systems during January-June 2026. ([view.news.eu.nasdaq.com](https://view.news.eu.nasdaq.com/view?id=b31e0441f9312b703260c585301e8b7ea&lang=en))
- Company verification: The inspected release does not provide model-specific confirmation of fulfilled NorrDigi MCC excavator orders or deliveries.

106. Mantsinen Group - Contact

- Company verification: The common business website uses Mantsinen Group Ltd in its footer while identifying Mantsinen Group Ltd Oy for business contact and invoicing, substantiating overlapping name presentations rather than another manufacturer. ([mantsinen.com](https://mantsinen.com/contact-us/mantsinen-group/))
- Company verification: The official contact and invoicing record explicitly identifies Mantsinen Group Ltd Oy and its Finnish business location.
- Company verification: The same contact record labels its corporate organization Mantsinen Group and its invoicing entity Mantsinen Group Ltd Oy, supporting the retained shorter name as a presentation of the common business.

107. Caterpillar Reports Second-Quarter 2026 Results

- Company verification: Caterpillar's August xx.xx 2026 results announcement identifies Caterpillar Inc. and reports continuing construction- and mining-equipment operations, refreshing corporate identity and operating-continuity support. ([caterpillar.com](https://www.caterpillar.com/en/news/corporate-press-releases/h/2q26-results-caterpillar-inc.html))
- Company verification: This corporate disclosure does not establish a current hybrid excavator offering or hybrid-attributable revenue.

108. 建設機械で業界初 住友建機と住友重機械 が「双方向音声コミュニケーション機能」を開発 ～油圧ショベル内外の作業者が
デバイスレスで「聞こえる」「話せる」～

- Company verification: The May xx.xx 2026 company announcement identifies the Japanese construction-machinery operator as wholly owned by Sumitomo Heavy Industries, refreshing the ownership and operating-continuity link. ([sumitomokenki.co.jp](https://www.sumitomokenki.co.jp/news/2026/xx.xx/))
- Company verification: The announcement is not a hybrid-model availability record and does not establish current SH200HB-xx.xx production or order acceptance.



19. Key Experts

Every expert listed below was interviewed for this report. The listed excavator product, equipment-sales and distribution roles at organizations such as Caterpillar Inc., Komatsu, Volvo Construction Equipment and Al-Futtaim - FAMCO are relevant to offering fit and commercial access.

Table 345. Global Hybrid Excavators Market, Key Experts

Name	Professional Role	Organization	Country
Adam Woods	General Manager, Innovation and Product Portfolio Strategies	LBX Company	United States
Alastair Hayfield	Senior Research Director	Interact Analysis	United Kingdom
Andrea Vacca	Maha Fluid Power Faculty Chair and Professor	Purdue University	United States
Andrew Earing	Director of Tracked Products	Komatsu	United States
Anirban Bagchi	Construction-equipment editor and journalist	CPI Trade Media	United Arab Emirates
Arvind Garg	Head of Construction & Mining Machinery	Larsen & Toubro	India
Becky Schultz	Editor, Power Progress	Power Progress, KHL Group	United States
Bing Xu	Professor of Mechanical Engineering	Zhejiang University	China
Bob Womersley	Director of Advanced Engineering	JCB	United Kingdom
Boris Sánchez	Director of Services and Solutions, Latin America	Volvo Construction Equipment	Brazil
Brian P. McGuire	President and Chief Executive Officer	Associated Equipment Distributors	United States
Burkhard Janssen	General Manager, Product Management and Engineering	Hitachi Construction Machinery Europe	Netherlands
Chris Sleight	Managing Director	Off-Highway Research	United Kingdom
Chris Yengst	President	Yengst Associates	United States
David Vaughan	Managing Director, Equipment	Babcock International Group (Africa)	South Africa
Dimitrov Krishnan	Managing Director, India	Volvo Construction Equipment	India
Don McCloud	Senior Editor	Equipment World	United States

Table 345 - continued

Name	Professional Role	Organization	Country
Doug McQuinn	General Manager, Sales and Marketing	Kobelco Construction Machinery Australia	Australia
Frank Raczon	Senior Editor	Construction Equipment	United States
Frans Kesuma	President Director	PT United Tractors Tbk	Indonesia
Hironao Yamada	Professor of Mechanical Engineering	Gifu University	Japan
Hiroyuki Ogawa	Former President and Chief Executive Officer	Komatsu	Japan
Hua Zhou	Professor of Mechanical Engineering	Zhejiang University	China
Huayong Yang	Professor of Mechanical Engineering	Zhejiang University	China
Hubertus Murrenhoff	Professor Emeritus of Fluid Power; Former Director of ifas	RWTH Aachen University	Germany
James D. Van de Ven	Professor of Mechanical Engineering	University of Minnesota	United States
James Jeffs	Senior Technology Analyst	IDTechEx	United Kingdom
Jo Monsieur	Deputy General Manager, Product Marketing	Komatsu Europe	Belgium
Joachim Schmid	Managing Director, Construction Equipment and Building Material Machinery	VDMA	Germany
John Bambridge	Editor, Plant & Equipment	Plant & Equipment	United Arab Emirates
John Somers	Vice President, Construction and Utility	Association of Equipment Manufacturers	United States
Jonathan Tolomeo	Product Manager, Excavators	Komatsu	United States
Jordan Lumpkins	General Manager, Product Marketing and Development	Kobelco Construction Machinery USA	United States
Junhui Zhang	Professor of Mechanical Engineering	Zhejiang University	China
Jussi Suomela	Head of Mobile Work Machines, Editron	Danfoss Power Solutions	Finland
Jürgen Weber	Professor and Chair, Fluid-Mechatronic Systems	TU Dresden	Germany
Kalevi Huhtala	Professor of Hydraulics and Machine Automation	Tampere University	Finland
Katharina Schmitz	Professor and Director, Institute for Fluid Power Drives and Systems	RWTH Aachen University	Germany

Table 345 - continued

Name	Professional Role	Organization	Country
Kazuhisa Ito	Professor, Machinery and Control Systems	Shibaura Institute of Technology	Japan
Kazushi Sanada	Professor of Mechanical Engineering	Yokohama National University	Japan
Ken Gray	Former Global Product Manager, Large Hydraulic Excavators	Caterpillar Inc.	United States
Kent Pellegrini	Global Product Marketing Manager, Excavators	Caterpillar Inc.	United States
Kim A. Stelson	Distinguished Professor of Mechanical Engineering	University of Minnesota	United States
Kimmo Rauma	Vice President, Editron	Danfoss Power Solutions	Finland
Kip Eideberg	Senior Vice President, Government and Industry Relations	Association of Equipment Manufacturers	United States
Kotaro Hirano	Chairman and Executive Officer	Hitachi Construction Machinery	Japan
Kurt Moncini	Senior Product Manager, Tracked Products	Komatsu	United States
Kyoung Kwan Ahn	Professor of Mechanical Engineering	University of Ulsan	South Korea
Lance Mannix	General Manager, Sales, Equipment	Babcock International Group (Africa)	South Africa
Lars Arnold	Electromobility Product Manager	Volvo Construction Equipment	United States
Li Hongbao	Executive Vice President and Secretary-General, Excavation Machinery Branch	China Construction Machinery Association	China
Long Quan	Professor of Mechanical Engineering	Taiyuan University of Technology	China
Lv Ying	Deputy Secretary-General	China Construction Machinery Association	China
Marcus Geimer	Professor of Mobile Machinery	Karlsruhe Institute of Technology	Germany
Masafumi Senzaki	President and Chief Executive Officer	Hitachi Construction Machinery	Japan
Mats Sköldberg	Head of Technology	Volvo Construction Equipment	Sweden
Matti Linjama	Adjunct Professor and Digital Hydraulics Researcher	Tampere University	Finland
Matti Pietola	Professor of Mechatronics	Aalto University	Finland
Maya Xiao	Research Manager	Interact Analysis	China

Table 345 - continued

Name	Professional Role	Organization	Country
Munesu Shoko	Editor-in-Chief	Quarrying Africa	South Africa
Niall Caldwell	Senior Director, Digital Displacement R&D	Danfoss Power Solutions	United Kingdom
Paolo Casoli	Professor of Fluid Power	University of Parma	Italy
Patrick Baker	Product Manager, Medium and Large Excavators	Hitachi Construction Machinery Americas	United States
Paul Howard	Senior Consultant	Off-Highway Research	United Kingdom
Perry Y. Li	Professor of Mechanical Engineering	University of Minnesota	United States
Peter Achten	Founder and Director	INNAS	Netherlands
Peter Stuijt	Product Marketing Manager	Kobelco Construction Machinery Europe	Netherlands
Petter Krus	Professor of Fluid and Mechatronic Systems	Linköping University	Sweden
Piet van Bakergem	General Manager, Sales	Hitachi Construction Machinery Africa	South Africa
Qingfeng Wang	Professor of Mechanical Engineering	Zhejiang University	China
Ramez Hamdan	Managing Director, Industrial Equipment	Al-Futtaim - FAMCO	United Arab Emirates
Riccardo Viaggi	Secretary General	Committee for European Construction Equipment	Belgium
Ryan Neal	Product Application Specialist, Large Excavators	Caterpillar Inc.	United States
Samir Bansal	General Manager, India	Off-Highway Research	India
Sandeep Singh	Managing Director	Tata Hitachi Construction Machinery	India
Sara Feuling	Senior Director of Construction	Association of Equipment Manufacturers	United States
Scott Hazelton	Managing Director, Construction Consulting	S&P Global Market Intelligence	United States
Sean Taylor	Former Chief Executive Officer and Managing Director	Komatsu Australia	Australia
Sebastian Popp	Deputy Managing Director, Construction Equipment and Building Material Machinery	VDMA	Germany
Sejong Ko	Product Manager, Large Excavators	Volvo Construction Equipment	United States
Shi Yang	Director of Research	Off-Highway Research	China

Table 345 - continued

Name	Professional Role	Organization	Country
Shirly Zhu	Principal Analyst	Interact Analysis	China
Stephen White	Construction-machinery and commercial-fleet editor	CPI Trade Media	United Arab Emirates
Su Zimeng	President	China Construction Machinery Association	China
Sungwoo Choi	Product Manager, Excavators	Volvo Construction Equipment	United States
Tatiana Minav	Associate Professor, Electro-Hydraulic Systems	Tampere University	Finland
Tetsuji Ohashi	Former President and Chief Executive Officer	Komatsu	Japan
Tianliang Lin	Professor, Mechanical Engineering and Automation	Huaqiao University	China
Tim Burnhope	Chief Innovation and Growth Officer	JCB	United Kingdom
Viki Bell	Chief Executive	Construction Equipment Association	United Kingdom
Vince Porteous	Product Manager	Marubeni-Komatsu	United Kingdom
Vladimir Knezevic	Former Managing Director, FAMCO UAE	Al-Futtaim - FAMCO	United Arab Emirates
Wilbert Blom	Excavator Product Specialist	Hitachi Construction Machinery Europe	Netherlands
William Groven	Product Manager, Hydraulic Excavators	Komatsu Europe	Belgium
Win Rampen	Emeritus Professor of Energy Storage; Founder of Artemis Intelligent Power	University of Edinburgh	United Kingdom
Özgür Günaydın	Chief Executive Officer, Borusan Cat	Borusan Cat	Turkey

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