

Global Tunnel Boring Machine Market: 2026 Edition

<https://marketpublishers.com/r/G788B291D828EN.html>

Date: April 2026

Pages: 151

Price: US\$ 2,250.00 (Single User License)

ID: G788B291D828EN

Abstracts

A Tunnel Boring Machine (TBM) is a sophisticated and highly engineered machine used to excavate tunnels through a variety of subsurface conditions, ranging from hard rock to soft ground and everything in between. Unlike traditional drill-and-blast methods, TBMs offer a more continuous and often faster excavation process, with reduced ground disturbance and improved safety, making them essential for a wide range of infrastructure projects including metro systems, railway tunnels, water conveyance tunnels, and utility tunnels. The global tunnel boring machine market value in 2024 stood at US\$7.36 billion, and is projected to reach US\$9.79 billion by 2030.

The global tunnel boring machine market is primarily driven by the escalating demand for advanced underground infrastructure necessitated by rapid urbanization and growing populations worldwide. This fuels the need for efficient transportation networks like metro systems and high-speed railways, as well as essential utility tunnels. Supportive government investments in infrastructure projects, coupled with the technological advancements in TBMs that enhance their speed, safety, and efficiency, further propel market growth. Moreover, the increasing focus on minimizing surface disruption and environmental impact in densely populated areas makes TBMs a preferred solution for various tunneling applications. The global tunnel boring machine market value is projected to grow at a CAGR of 4.87%, during the forecast period of 2025-2030.

Market Segmentation Analysis:

By Type: According to the report, based on type, the global tunnel boring machine market can be divided into three segments: hard rock tunnel boring machine, soft rock tunnel boring machine and heterogeneous ground tunnel boring machine. Hard rock tunnel boring machine market segment is further segmented as Shielded TBMs and Open Type TBMs, and soft rock tunnel boring machine segment is segmented as Slurry

Shield TBMs, Earth pressure balance TBMs, Open Face Type TBMs and Others. Hard rock tunnel boring machine segment acquired majority of share in the market in 2024 due to the extensive use of these machines in large-scale infrastructure projects such as railway and road tunnels, which often encounter hard rock formations. The sheer volume and scale of these projects globally have historically driven the demand for hard rock TBMs. However, the soft rock tunnel boring machine segment is anticipated to grow the fastest during the forecasted period because of increasing urbanization and the subsequent need for efficient and less disruptive underground construction in densely populated areas. Soft ground conditions are prevalent in many urban environments, making soft rock TBMs, particularly Earth Pressure Balance (EPB) and Slurry Shield machines, crucial for metro systems, utility tunnels, and other infrastructure developments in these regions. Their ability to handle unconsolidated soils and minimize surface disruption makes them ideal for the growing number of underground projects in expanding cities worldwide.

By Application: According to the report, the global tunnel boring machine market is bifurcated into five types of applications: transport, mining, oil & gas, utilities and others. Transport segment acquired the majority share in the global tunnel boring machine market in 2024 and is projected to be the fastest-growing application. This is primarily because of the massive investments governments worldwide are making in transportation infrastructure. The demand for efficient and high-capacity transit systems, including metro networks, high-speed railways, and road tunnels, is surging to connect urban centers, facilitate trade, and improve overall mobility. Tunnel boring machines offer a faster, safer, and often more cost-effective solution for creating these vital transportation links, especially in challenging geological conditions or densely populated areas where minimizing surface disruption is crucial. This continuous focus on enhancing transportation infrastructure globally is fueling both the current market share and the rapid growth of the TBM market within the transport sector.

By Region: The report provides insight into the tunnel boring machine market based on the geographical operations, namely, North America, Europe, Asia Pacific, Latin America and Middle East & Africa. Asia Pacific tunnel boring machine market enjoyed the highest market share in 2024 and is expected to see the most rapid growth due to significant urbanization and population expansion driving substantial investments in infrastructure, particularly in metro and high-speed rail systems. Supportive government policies and the necessity for efficient underground construction in densely populated areas further boost this demand. Moreover, the Asia Pacific region is witnessing rapid advancements and adoption of cutting-edge TBM technologies. Innovations in areas such as AI-powered automation for enhanced operational efficiency, sophisticated real-

time geological mapping for improved safety and accuracy, and remote monitoring systems for proactive maintenance are making TBMs an even more compelling choice for tackling complex and challenging tunneling projects. Beyond transportation, the growing mining sector in certain parts of the region also contributes to the demand for TBMs for creating essential access tunnels and underground infrastructure.

Global Tunnel boring Machine Market Dynamics:

Growth Drivers: One of the most significant factors propelling the growth of the global tunnel boring machine market is the escalating need for advanced and efficient underground infrastructure to support increasing urbanization and population growth worldwide. As cities expand and populations concentrate, the demand for robust transportation networks, including metro systems and high-speed railways, as well as essential utilities like water and sewage tunnels, intensifies. TBMs offer a compelling solution for creating this underground infrastructure with greater speed, accuracy, and reduced surface disruption compared to traditional methods, making them indispensable for modern urban development and driving their market growth. Other factors driving the growth of global tunnel boring machine market include rising mining activities, growing demand for efficient transportation connectivity, increasing demand for water management systems, increased government investments in infrastructure etc.

Challenges: One significant challenge faced by the global tunnel boring machine market is the high initial investment and operational costs associated with these sophisticated pieces of machinery. TBMs are extremely large, complex, and often customized for specific geological conditions and project requirements, leading to substantial upfront capital expenditure. Furthermore, the costs associated with their transportation, assembly, operation, maintenance, and the need for specialized personnel contribute to the overall high expenses. This financial barrier can limit the adoption of TBM technology, particularly for smaller construction companies or projects with budget constraints, potentially hindering market growth despite the numerous advantages TBMs offer in terms of efficiency and safety.

Trends: One major trend poised to further accelerate the growth of the tunnel boring machine market is the continuous advancement and integration of smart technologies. This includes the increasing incorporation of automation, artificial intelligence (AI), the Industrial Internet of Things (IIoT), and sophisticated data analytics into TBM operations. These technologies enhance efficiency by optimizing drilling parameters in real-time based on geological conditions, improving navigation accuracy, enabling

predictive maintenance to reduce downtime, and even paving the way for autonomous TBM operation. As these smart solutions mature and become more widely adopted, they will significantly improve the productivity, safety, and cost-effectiveness of tunneling projects, making TBMs an even more attractive option for a broader range of underground infrastructure developments. The market is also projected to grow at a fast pace during the forecast period, due to various other latest trends such as Advancements in Cutting Technology, Development of Multi-Mode and Adaptive TBMs, Sustainable Tunneling Solutions, Micro-tunneling and Small-Diameter TBMs etc.

Competitive Landscape and Recent Developments:

The global tunnel boring machine market is moderately fragmented, with a mix of large multinational corporations and regional players competing in different segments. While major global companies like CREC, Herrenknecht, and CRCHI are generally considered to hold significant portions of the global market, there are also numerous small and mid-sized manufacturers catering to regional demands and niche applications. Key players of global tunnel boring machine market are:

Kawasaki Heavy Industries Ltd.

Herrenknecht AG

The Robbins Company

TERRATEC Ltd.

Hitachi Zosen Sakai Works

Komatsu Ltd.

Mitsubishi Heavy Industries Ltd.

China Railway Construction Heavy Industry (CRCHI)

IHI Corporation

Sika Ag

Liaoning Censcience Industry Co. Ltd.

Qinhuangdao Tianye Tolian Heavy Industry & Technology Co. Ltd.

The key players are constantly investing in strategic initiatives, such as adoption of new technologies, introducing their products to emerging markets and more, to maintain a competitive edge in this market. For instance, On December 20, 2024, Herrenknecht AG announced that the company will supply two Mixshield tunnel boring machines (TBMs), each with a diameter of 15.62 meters, making them the largest TBMs in India for the construction of the Versova-Dahisar road in Mumbai.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Tunnel Boring Machine: An Overview

2.1.1 Introduction to Tunnel Boring Machine

2.1.2 Key Features of a Tunnel Boring Machine

2.2 Tunnel Boring Machine: An Overview

2.2.1 Tunnel Boring Machine Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Tunnel Boring Machine Market: An Analysis

3.1.1 Global Tunnel Boring Machine Market: An Overview

3.1.2 Global Tunnel Boring Machine Market by Value

3.1.3 Global Tunnel Boring Machine Market by Type (Hard Rock Tunnel Boring Machine, Soft Rock Tunnel Boring Machine and Heterogeneous Ground Tunnel Boring Machine)

3.1.4 Global Tunnel Boring Machine Market by Application (Transport, Mining, Oil & Gas, Utilities and Others)

3.1.5 Global Tunnel Boring Machine Market by Region (Asia Pacific, North America, Europe, Latin America and Middle East & Africa)

3.2 Global Tunnel Boring Machine Market: Type Analysis

3.2.1 Global Tunnel Boring Machine Market by Type: An Overview

3.2.2 Global Hard Rock Tunnel Boring Machine Market by Value

3.2.3 Global Hard Rock Tunnel Boring Machine Market by Type (Shielded TBMs and Open Type TBMs)

3.2.4 Global Shielded Hard Rock Tunnel Boring Machine Market by Value

3.2.5 Global Open Type Hard Rock Tunnel Boring Machine Market by Value

3.2.6 Global Soft Rock Tunnel Boring Machine Market by Value

3.2.7 Global Soft Rock Tunnel Boring Machine Market by Type (Slurry Shield TBMs, Earth pressure balance TBMs, Open Face Type TBMs and Others)

3.2.8 Global Slurry Shield Soft Rock Tunnel Boring Machine Market by Value

3.2.9 Global Earth Pressure Balance Soft Rock Tunnel Boring Machine Market by Value

3.2.10 Global Open Face Type Soft Rock Tunnel Boring Machine Market by Value

3.2.11 Global Others Soft Rock Tunnel Boring Machine Market by Value

- 3.2.12 Global Heterogeneous Ground Tunnel Boring Machine Market by Value
- 3.3 Global Tunnel Boring Machine Market: Application Analysis
 - 3.3.1 Global Tunnel Boring Machine Market by Application: An Overview
 - 3.3.2 Global Transport Infrastructure Tunnel Boring Machine Market by Value
 - 3.3.3 Global Mining Tunnel Boring Machine Market by Value
 - 3.3.4 Global Oil & Gas Tunnel Boring Machine Market by Value
 - 3.3.5 Global Utilities Tunnel Boring Machine Market by Value
 - 3.3.6 Global Others Tunnel Boring Machine Market by Value

4. REGIONAL MARKET ANALYSIS

- 4.1 Asia Pacific Tunnel Boring Machine Market: An Analysis
 - 4.1.1 Asia Pacific Tunnel Boring Machine Market: An Overview
 - 4.1.2 Asia Pacific Tunnel Boring Machine Market by Value
 - 4.1.3 Asia Pacific Tunnel Boring Machine Market by Region (China, India, Japan, South Korea and Rest of Asia Pacific)
 - 4.1.4 China Tunnel Boring Machine Market by Value
 - 4.1.5 India Tunnel Boring Machine Market by Value
 - 4.1.6 Japan Tunnel Boring Machine Market by Value
 - 4.1.7 South Korea Tunnel Boring Machine Market by Value
 - 4.1.8 Rest of Asia Pacific Tunnel Boring Machine Market by Value
- 4.2 Europe Tunnel Boring Machine Market: An Analysis
 - 4.2.1 Europe Tunnel Boring Machine Market: An Overview
 - 4.2.2 Europe Tunnel Boring Machine Market by Value
 - 4.2.3 Europe Tunnel Boring Machine Market by Region (Germany, France, UK, Italy, Spain and Rest of Europe)
 - 4.2.4 Germany Tunnel Boring Machine Market by Value
 - 4.2.5 France Tunnel Boring Machine Market by Value
 - 4.2.6 United Kingdom Tunnel Boring Machine Market by Value
 - 4.2.7 Italy Tunnel Boring Machine Market by Value
 - 4.2.8 Spain Tunnel Boring Machine Market by Value
 - 4.2.9 Rest of Europe Tunnel Boring Machine Market by Value
- 4.3 North America Tunnel Boring Machine Market: An Analysis
 - 4.3.1 North America Tunnel Boring Machine Market: An Overview
 - 4.3.2 North America Tunnel Boring Machine Market by Value
 - 4.3.3 North America Tunnel Boring Machine Market by Region (The US, Canada and Mexico)
 - 4.3.4 The US Tunnel Boring Machine Market by Value
 - 4.3.5 Canada Tunnel Boring Machine Market by Value

- 4.3.6 Mexico Tunnel Boring Machine Market by Value
- 4.4 Latin America Tunnel Boring Machine Market: An Analysis
 - 4.4.1 Latin America Tunnel Boring Machine Market: An Overview
 - 4.4.2 Latin America Tunnel Boring Machine Market by Value
- 4.5 Middle East & Africa Tunnel Boring Machine Market: An Analysis
 - 4.5.1 Middle East & Africa Tunnel Boring Machine Market: An Overview
 - 4.5.2 Middle East & Africa Tunnel Boring Machine Market by Value

5. MARKET DYNAMICS

- 5.1 Growth Drivers
 - 5.1.1 Rapid Urbanization and Population Growth
 - 5.1.2 Rising Mining Activities
 - 5.1.3 Growing Demand for Efficient Transportation Connectivity
 - 5.1.4 Increasing Demand for Water Management Systems
 - 5.1.5 Increased Government Investments in Infrastructure
- 5.2 Challenges
 - 5.2.1 High Initial Investment Costs and Operating Costs
 - 5.2.2 Geological and Environmental Limitations
- 5.3 Market Trends
 - 5.3.1 Rising Smart City Projects
 - 5.3.2 Adoption of IoT and Smart Monitoring Systems
 - 5.3.3 Increased Automation and AI Integration
 - 5.3.4 Advancements in Cutting Technology
 - 5.3.5 Development of Multi-Mode and Adaptive TBMs
 - 5.3.6 Sustainable Tunneling Solutions
 - 5.3.7 Micro-tunneling and Small-Diameter TBMs

6. COMPETITIVE LANDSCAPE

- 6.1 Global Tunnel Boring Machine Market Players: Competitive Landscape
- 6.2 Global Tunnel Boring Machine Market Players: Recent Developments

7. COMPANY PROFILES

- 7.1 Komatsu
 - 7.1.1 Business Overview
 - 7.1.2 Operating Segments
 - 7.1.3 Business Strategy

- 7.2 Hitachi Construction Machinery Co. Ltd.
 - 7.2.1 Business Overview
 - 7.2.2 Operating Segments
 - 7.2.3 Business Strategy
- 7.3 Kawasaki Heavy Industries, Ltd.
 - 7.3.1 Business Overview
 - 7.3.2 Operating Segments
 - 7.3.3 Business Strategy
- 7.4 Kanadevia Corporation
 - 7.4.1 Business Overview
 - 7.4.2 Operating Markets
 - 7.4.2 Business Strategy
- 7.5 IHI Corporation
 - 7.5.1 Business Overview
 - 7.5.2 Operating Segments
 - 7.5.3 Business Strategy
- 7.6 Sika AG
 - 7.6.1 Business Overview
 - 7.6.2 Operating Markets
 - 7.6.3 Business Strategy
- 7.7 Herrenknecht AG
 - 7.7.1 Business Overview
 - 7.7.2 Business Strategy
- 7.8 The Robbins Company
 - 7.8.1 Business Overview
 - 7.8.2 Business Strategy
- 7.9 Terratec Ltd.
 - 7.9.1 Business Overview
 - 7.9.2 Business Strategy
- 7.10 Qinhuangdao Tianye Tolian Heavy Industry & Technology Co., Ltd.
 - 7.10.1 Business Overview
 - 7.10.2 Business Strategy
- 7.11 China Railway Construction Heavy Industry (CRCHI)
 - 7.11.1 Business Overview
- 7.12 Liaoning Censcience Industry Co., Ltd.
 - 7.12.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Key Features of a Tunnel Boring Machine

Figure 2: Tunnel Boring Machine Segmentation

Figure 3: Global Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 4: Global Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 5: Global Tunnel Boring Machine Market by Type; 2024 (Percentage, %)

Figure 6: Global Tunnel Boring Machine Market by Application; 2024 (Percentage, %)

Figure 7: Global Tunnel Boring Machine Market by Region; 2024 (Percentage, %)

Figure 8: Global Hard Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 9: Global Hard Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 10: Global Hard Rock Tunnel Boring Machine Market by Type; 2024 (Percentage, %)

Figure 11: Global Shielded Hard Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 12: Global Shielded Hard Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 13: Global Open Type Hard Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 14: Global Open Type Hard Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 15: Global Soft Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 16: Global Soft Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 17: Global Soft Rock Tunnel Boring Machine Market by Type; 2024 (Percentage, %)

Figure 18: Global Slurry Shield Soft Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 19: Global Slurry Shield Soft Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 20: Global Earth Pressure Balance Soft Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 21: Global Earth Pressure Balance Soft Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 22: Global Open Face Type Soft Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 23: Global Open Face Type Soft Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 24: Global Others Soft Rock Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 25: Global Others Soft Rock Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 26: Global Heterogeneous Ground Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 27: Global Heterogeneous Ground Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 28: Global Transport Infrastructure Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 29: Global Transport Infrastructure Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 30: Global Mining Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 31: Global Mining Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 32: Global Oil & Gas Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 33: Global Oil & Gas Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 34: Global Utilities Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 35: Global Utilities Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 36: Global Others Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 37: Global Others Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 38: Asia Pacific Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 39: Asia Pacific Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 40: Asia Pacific Tunnel Boring Machine Market by Region; 2024 (Percentage, %)

Figure 41: China Tunnel Boring Machine Market by Value, 2020-2024 (US\$ Billion)

Figure 42: China Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 43: India Tunnel Boring Machine Market by Value, 2020-2024 (US\$ Million)

Figure 44: India Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 45: Japan Tunnel Boring Machine Market by Value, 2020-2024 (US\$ Million)

Figure 46: Japan Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 47: South Korea Tunnel Boring Machine Market by Value, 2020-2024 (US\$ Million)

Figure 48: South Korea Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 49: Rest of Asia Pacific Tunnel Boring Machine Market by Value, 2020-2024 (US\$ Million)

Figure 50: Rest of Asia Pacific Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 51: Europe Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 52: Europe Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 53: Europe Tunnel Boring Machine Market by Region; 2024 (Percentage, %)

Figure 54: Germany Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 55: Germany Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 56: France Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 57: France Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 58: United Kingdom Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 59: United Kingdom Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 60: Italy Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 61: Italy Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 62: Spain Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 63: Spain Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 64: Rest of Europe Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 65: Rest of Europe Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 66: North America Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 67: North America Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 68: North America Tunnel Boring Machine Market by Region; 2024 (Percentage, %)

Figure 69: The US Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 70: The US Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 71: Canada Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 72: Canada Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Billion)

Figure 73: Mexico Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 74: Mexico Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 75: Latin America Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Billion)

Figure 76: Latin America Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 77: Middle East & Africa Tunnel Boring Machine Market by Value; 2020-2024 (US\$ Million)

Figure 78: Middle East & Africa Tunnel Boring Machine Market by Value; 2025-2030 (US\$ Million)

Figure 79: Global Urban Population; 2017, 2022 & 2050 (Million)

Figure 80: Total Minerals Production Worldwide; 2020-2023 (Billion Metric tn)

Figure 81: Key Upcoming Road Tunnels in India; 2024-2028

Figure 82: Projected Revenue Generated by Companies in the Global Smart City; 2020-2028 (US\$ Billion)

Figure 83: Global Active IOT Connections (Installed Base); 2022-2029 (Billion)

Figure 84: Global Artificial Intelligence Market Size; 2021-2030 (US \$Billion)

Figure 85: Komatsu Net Sales by Segments; 2024 (Percentage, %)

Figure 86: Hitachi Construction Machinery Co. Ltd Revenue by Segments; 2024 (Percentage, %)

Figure 87: Kawasaki Heavy Industries, Ltd. Total Sales by Segment; 2024 (Percentage, %)

Figure 88: Kanadevia Corporation Total Sales by Segment; 2023 (Percentage, %)

Figure 89: IHI Corporation Revenue by Segment; 2024 (Percentage, %)

Figure 90: Sika AG Net Sales by Segment; 2024 (Percentage, %)

I would like to order

Product name: Global Tunnel Boring Machine Market: 2026 Edition

Product link: <https://marketpublishers.com/r/G788B291D828EN.html>

Price: US\$ 2,250.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/G788B291D828EN.html>