

# Global Tunnel Boring Machine (TBM) Competitive Landscape Professional Research Report 2025

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## Abstracts

### Market Overview

According to DIResearch's in-depth investigation and research, the global Tunnel Boring Machine (TBM) market size will reach 650.63 Million USD in 2025 and is projected to reach 1,076.62 Million USD by 2032, with a CAGR of 7.46% (2025-2032). Notably, the China Tunnel Boring Machine (TBM) market has changed rapidly in the past few years. By 2025, China's market size is expected to be Million USD, representing approximately % of the global market share.

### Research Summary

A Tunnel Boring Machine (TBM) is a massive, specialized piece of equipment used for excavating tunnels in a variety of ground conditions. TBMs are particularly employed in large-scale infrastructure projects such as subway systems, highways, and water and sewage tunnels. The machine consists of a rotating cutter head equipped with cutting tools and a cylindrical shield that encases the machinery and protects workers from the surrounding ground. TBMs operate by cutting through the soil or rock in front of them, and the excavated material is transported out of the tunnel through a conveyor belt or another removal system. The use of TBMs significantly speeds up tunnel construction compared to traditional methods, reduces the need for extensive manual labor, and minimizes surface disruption. These machines play a crucial role in the efficient and safe excavation of tunnels for various infrastructure projects around the world.

The major global manufacturers of Tunnel Boring Machine (TBM) include CRHIC, Herrenknecht, CRCHI, Tianhe Mechanical Equipment, Liaoning Censcience Industry Co., Ltd, JIMT, Robbins, Komatsu, Shanghai Tunnel Engineering Co., Ltd, Hitachi

Zosen, Kawasaki, Terratec, Xugong Kaigong, etc. The global players competition landscape in this report is divided into three tiers. The first tier comprises global leading enterprises that command a substantial market share, hold a dominant industry position, possess strong competitiveness and influence, and generate significant revenue. The second tier includes companies with a notable market presence and reputation; these firms actively follow industry leaders in product, service, or technological innovation and maintain a moderate revenue scale. The third tier consists of smaller companies with limited market share and lower brand recognition, primarily focused on local markets and generating comparatively lower revenue.

This report studies the market size, price trends and future development prospects of Tunnel Boring Machine (TBM). Focus on analysing the market share, product portfolio, prices, sales, revenue and gross profit margin of global major manufacturers, as well as the market status and trends of different product types and applications in the global Tunnel Boring Machine (TBM) market. The report data covers historical data from 2020 to 2024, based year in 2025 and forecast data from 2026 to 2032.

The regions and countries in the report include North America, Europe, China, APAC (excl. China), Latin America and Middle East and Africa, covering the Tunnel Boring Machine (TBM) market conditions and future development trends of key regions and countries, combined with industry-related policies and the latest technological developments, analyze the development characteristics of Tunnel Boring Machine (TBM) industries in various regions and countries, help companies understand the development characteristics of each region, help companies formulate business strategies, and achieve the ultimate goal of the company's global development strategy.

The data sources of this report mainly include the National Bureau of Statistics, customs databases, industry associations, corporate financial reports, third-party databases, etc. Among them, macroeconomic data mainly comes from the National Bureau of Statistics, International Economic Research Organization; industry statistical data mainly come from industry associations; company data mainly comes from interviews, public information collection, third-party reliable databases, and price data mainly comes from various markets monitoring database.

Global Key Manufacturers of Tunnel Boring Machine (TBM) Include:

CRHIC

Herrenknecht

CRCHI

Tianhe Mechanical Equipment

Liaoning Censcience Industry Co., Ltd

JIMT

Robbins

Komatsu

Shanghai Tunnel Engineering Co., Ltd

Hitachi Zosen

Kawasaki

Terratec

Xugong Kaigong

Tunnel Boring Machine (TBM) Product Segment Include:

Soft Ground TBMs

Hard Rock TBMs

Tunnel Boring Machine (TBM) Product Application Include:

City Rail System

Railway and Highway

Municipal Engineering

Others

## **Chapter Scope**

Chapter 1: Product Research Range, Product Types and Applications, Market Overview, Market Situation and Trends

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Chapter 3: Global Tunnel Boring Machine (TBM) Industry Porter's Five Forces Analysis

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