

Global CNC Tube-Sheet Drilling Machine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global CNC Tube-Sheet Drilling Machine market size is expected to reach \$ 264 million by 2032, rising at a market growth of 4.6% CAGR during the forecast period (2026-2032).

CNC Tube-Sheet Drilling Machine refers to specialized CNC metal-cutting equipment designed for high-efficiency and high-accuracy drilling of tube sheets used in shell-and-tube heat exchangers, condensers, boilers, pressure vessels, nuclear steam generators and related process equipment. The equipment combines CNC positioning, servo-controlled feed, rigid machine structures, high-pressure coolant and chip-removal systems to complete large numbers of regularly or irregularly arranged tube holes with consistent positional accuracy and machining quality. Depending on tube-sheet thickness, hole diameter, depth-to-diameter ratio and workpiece material, major processing routes include high-speed carbide drilling, gundrilling and BTA/STS deep-hole drilling, while selected systems also integrate reaming, chamfering, tapping or light milling functions. Typical machine architectures include gantry or bridge-type systems, column or floor-type machines, horizontal dedicated deep-hole machines and multi-spindle configurations. This study focuses on CNC Tube-Sheet Drilling Machine systems specifically developed or clearly positioned for tube-sheet machining, with principal applications in petrochemical processing, chemical equipment, power generation, nuclear equipment, boiler manufacturing, industrial heat exchangers, marine systems and other pressure-equipment manufacturing environments.

Key Findings

In 2025, global CNC Tube-Sheet Drilling Machine production reached

approximately 375,868 Units. The average price is approximately \$380

China has the broadest manufacturing base across standard gantry and deep-hole tube-sheet drilling equipment

High-value applications increasingly favor multi-spindle BTA and gundrilling configurations

Petrochemical chemical power and heat-exchanger manufacturing remain the principal demand foundations

Market Trends

The CNC Tube-Sheet Drilling Machine market is moving from basic automated hole positioning toward higher-throughput, process-controlled and increasingly integrated machining platforms. Product development is concentrating on multi-spindle independent control, higher spindle rigidity, high-pressure through-tool coolant, improved chip evacuation, BTA and gundrilling compatibility, drilling-and-milling integration, automatic hole-pattern programming, tool-life management and process-data recording. The direction of technology development varies by application: conventional and moderately thick tube sheets continue to support high-speed carbide drilling and gantry-type machines, while thick, high-value and high-hole-count tube sheets increasingly favor dedicated deep-hole architectures. Customers are also placing greater emphasis on reducing manual setup, improving first-pass yield and extending unattended machining time, particularly where a single tube sheet contains hundreds or thousands of holes. At the lower end of the market, versatile gantry machining and drilling centers are increasing competitive pressure on simple dedicated machines, while high-end specialized systems remain differentiated by deep-hole quality, multi-spindle productivity, heavy-workpiece handling and long-cycle process stability.

Market Dynamics

Drivers

Demand for CNC Tube-Sheet Drilling Machine equipment is primarily supported by continuing investment in shell-and-tube heat exchangers, condensers, boilers,

petrochemical pressure equipment and power-generation systems, together with the replacement of manual drilling and older CNC equipment. Tube-sheet machining is particularly sensitive to cycle time and positional accuracy because high-hole-count workpieces can require extended machining cycles and errors on expensive plates may create substantial scrap losses. Automation therefore provides clear production benefits through faster positioning, more consistent hole geometry, reduced dependence on operator skill and improved repeatability. Growth in large process equipment, higher-performance heat exchangers and demanding energy-related applications also supports demand for more rigid, higher-power and deep-hole-capable systems.

Restraints

The market is constrained by the long service life of industrial machine tools, project-based purchasing cycles and relatively limited annual demand for highly specialized machines. Standard tube-sheet applications can often be served by general-purpose gantry drilling and milling centers, particularly when workpieces are not exceptionally thick and hole-depth requirements are moderate, which limits the addressable market for dedicated equipment. High-end BTA and gundrilling systems also require substantial capital expenditure, specialized tooling, high-pressure coolant management and experienced process engineering. In addition, the highly customized nature of large tube-sheet machines reduces manufacturing standardization and can increase engineering, commissioning and after-sales costs.

Opportunities

The most attractive opportunities are concentrated in applications where general CNC equipment cannot easily deliver the required combination of productivity, hole straightness, workpiece capacity and process stability. Large petrochemical heat exchangers, nuclear and power-generation equipment, thick pressure-vessel tube sheets and high-value alloy workpieces create favorable conditions for multi-spindle and deep-hole systems. Further opportunities exist in upgrading established manufacturing bases from single-spindle or conventional drilling toward dual- or multi-spindle configurations, automated program generation, integrated drilling and milling, process monitoring and remote diagnostics. Chinese and Indian manufacturers also have opportunities to move toward higher-value international projects by improving deep-hole capability, machine reliability, documentation and global service support.

Challenges

The principal challenge is maintaining differentiation as general-purpose CNC machine tools improve in speed, rigidity and automation. Manufacturers competing primarily on standard gantry drilling capability face greater price pressure and a wider field of regional suppliers, while high-end vendors must demonstrate reliable long-term performance on expensive workpieces where customers are highly risk-sensitive. The market also lacks a fully standardized product configuration because tube-sheet diameter, thickness, material, hole pattern and required process route vary significantly across projects. This increases engineering complexity and makes direct price and performance comparison difficult. Suppliers must therefore balance customized engineering capability with modular product design, cost control and repeatable manufacturing quality.

Industry Chain Analysis

The upstream portion of the CNC Tube-Sheet Drilling Machine industry consists primarily of castings and fabricated machine structures, CNC systems, servo motors and drives, precision guideways and ball screws, spindles, bearings, hydraulic and pneumatic components, high-pressure coolant systems, filtration equipment, sensors, electrical components and deep-hole drilling tooling. Machine rigidity, spindle performance, motion-control accuracy and coolant management have a direct effect on final hole accuracy and machining stability, while imported or premium control, spindle and precision-motion components can represent an important share of the cost of higher-end systems. Midstream manufacturers integrate mechanical design, CNC control, spindle systems, process software, workholding and deep-hole drilling technology into complete machines, with value creation increasingly shifting from basic machine fabrication toward process engineering, multi-axis coordination, application know-how, automation and after-sales support. Downstream customers are mainly manufacturers of heat exchangers, condensers, boilers, pressure vessels, petrochemical equipment and power-generation equipment, where purchasing decisions are closely linked to tube-sheet size, annual production volume, target cycle time, material type and required hole quality.

Segment Insights

By drilling technology, high-speed carbide drilling remains important for conventional

tube sheets because of its comparatively high productivity, simpler tooling system and lower capital cost, while gundrilling and BTA/STS deep-hole drilling occupy the more technically demanding portion of the market. BTA/STS configurations are particularly relevant for thicker tube sheets and larger hole diameters, while gundrilling remains important where small-diameter straight deep holes are required. Hybrid machines capable of supporting more than one deep-hole process provide additional flexibility for manufacturers serving diversified pressure-equipment customers.

Machine architecture and spindle configuration also create clear product differentiation. Gantry and bridge-type systems are widely applicable to standard and medium-complexity tube-sheet manufacturing, whereas horizontal dedicated deep-hole and heavy column-type systems are better suited to thick, large and high-value workpieces. Single-spindle systems remain common in cost-sensitive and flexible production environments, while dual- and multi-spindle machines are increasingly attractive for high-hole-count tube sheets because productivity improvements can materially reduce machining time. Engineered-to-order equipment remains an important part of the high-end market because workpiece diameter, thickness, hole arrangement and plant-layout requirements frequently differ between projects.

Downstream Market Opportunities

The strongest downstream opportunities remain concentrated in industries where shell-and-tube heat exchangers and large pressure equipment are strategically important production assets. Petrochemical and chemical equipment manufacturing provides the broadest recurring demand base, while power-generation condensers, boiler systems and nuclear steam-generator applications create fewer but generally more demanding projects. Marine, LNG, desalination and other process industries provide additional demand for specialized tube-sheet machining. The most attractive equipment opportunities arise where customers need to shorten machining cycles on high-hole-count workpieces, reduce scrap risk on expensive alloy or thick plates, improve traceability and shift production away from operator-dependent processes. These requirements favor higher-rigidity machines, integrated drilling processes and advanced deep-hole configurations rather than basic CNC positioning alone.

Regional Insights

The regional structure differs significantly between manufacturing supply and end-user

demand. China has the broadest identified manufacturing base, covering relatively standardized gantry drilling machines, drilling-and-milling systems and increasingly sophisticated deep-hole tube-sheet equipment. This supply depth gives Chinese manufacturers advantages in product breadth, customization speed and cost competitiveness. Europe and North America have fewer dedicated suppliers but retain strong positions in large, multi-spindle, deep-hole and highly engineered systems, particularly for high-value workpieces and demanding energy applications. South Korea has established capabilities in BTA and gundrilling technology, while India has developed an active group of specialized and customized CNC Tube-Sheet Drilling Machine manufacturers serving domestic and export markets.

From the demand perspective, opportunities are closely linked to regional concentrations of petrochemical equipment, heat-exchanger manufacturing, power equipment and pressure-vessel fabrication rather than simply to overall machine-tool consumption. Asia is becoming increasingly important from the supply side as equipment manufacturing capacity and local process-equipment industries expand, while North American and European projects continue to support demand for higher-specification systems. Southeast Asia and the Middle East possess meaningful downstream petrochemical and process-industry demand but comparatively limited local production of specialized tube-sheet drilling equipment, creating continued opportunities for imported machines and regional service networks.

Competitive Landscape Analysis

The CNC Tube-Sheet Drilling Machine market is fragmented but clearly stratified by technology and application complexity. The broader global supplier pool contains approximately 48 relevant manufacturers and technology-linked entities, while 21 companies were retained in the core formal manufacturer list and 24 suppliers were included in the report-oriented competitive display set. The distinction reflects differences in product specialization and evidence of dedicated tube-sheet equipment rather than a simple revenue threshold. At the high end, UNISIG, Camozzi Machine Tools/Innse-Berardi, Galbiati and Precihole compete primarily through deep-hole process expertise, heavy-duty machine engineering, multi-spindle capability and application experience. Shin-IL and INSUNG represent an important Korean technology cluster around BTA, gundrilling and specialized tube-sheet equipment. Chinese manufacturers including FIN CNC and Shuochao, together with a broader group of regional CNC machine builders, provide the market with a wider range of gantry, drilling-and-milling and deep-hole configurations and exert substantial competitive pressure

through customization and cost efficiency. Indian manufacturers form another distinctive cluster in specialized and project-oriented equipment. Future competition is expected to become more polarized: standard tube-sheet drilling will face increasing substitution from versatile CNC drilling and machining centers, while the defensible portion of the market will concentrate on thick workpieces, deep-hole quality, multiple independently controlled spindles, high-pressure coolant management, process monitoring and high-value applications where machining reliability is more important than initial equipment price.

Report Scope

This report studies the global CNC Tube-Sheet Drilling Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for CNC Tube-Sheet Drilling Machine and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of CNC Tube-Sheet Drilling Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global CNC Tube-Sheet Drilling Machine total production and demand, 2021-2032, (K Units)

Global CNC Tube-Sheet Drilling Machine total production value, 2021-2032, (USD Million)

Global CNC Tube-Sheet Drilling Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global CNC Tube-Sheet Drilling Machine consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: CNC Tube-Sheet Drilling Machine domestic production, consumption, key domestic manufacturers and share

Global CNC Tube-Sheet Drilling Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global CNC Tube-Sheet Drilling Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global CNC Tube-Sheet Drilling Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global CNC Tube-Sheet Drilling Machine market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include UNISIG, Camozzi Machine Tools, Galbiati Group, Precihole Machine Tools, Shandong FIN CNC Machine, Shuochao CNC Equipment, Shin-IL Machinery, INSUNG MACHINE TOOLS, Shandong Sunrise CNC, Jinan Zhangli Machinery, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World CNC Tube-Sheet Drilling Machine market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global CNC Tube-Sheet Drilling Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global CNC Tube-Sheet Drilling Machine Market, Segmentation by Type:

Carbide Drilling

Gundrilling

STS Drilling

Hybrid BTA & Gundrilling

Others

Global CNC Tube-Sheet Drilling Machine Market, Segmentation by Machine Architecture:

Bridge-Type

Floor-Type

Horizontal Dedicated Deep-Hole Type

Rotary-Table

Others

Global CNC Tube-Sheet Drilling Machine Market, Segmentation by Maximum Drilling Diameter:

Drilling range $\varnothing 6$ – $\varnothing 40$ mm

Drilling $\varnothing 10$ – $\varnothing 60$ mm

Drilling $\varnothing 14$ – $\varnothing 70$ mm

Drilling $\varnothing 14$ – $\varnothing 80$ mm

Global CNC Tube-Sheet Drilling Machine Market, Segmentation by Application:

Petrochemical and Chemical Processing

Power Generation and Nuclear

Industrial Heat Exchanger and Boiler Manufacturing

Others

Companies Profiled:

UNISIG

Camozzi Machine Tools

Galbiati Group

Precihole Machine Tools

Shandong FIN CNC Machine

Shuochao CNC Equipment

Shin-IL Machinery

INSUNG MACHINE TOOLS

Shandong Sunrise CNC

Jinan Zhangli Machinery

Dezhou Guanlu

Changzhou Yikefeng

Dezhou Premach

D.O.TECH

Jinan Perfect Machine

Shandong Yudong Sunshine

Shandong Alles

Guangdong Taihan

KYOEI CO., LTD.

Miroku Machine Tool Inc.

Competence Techno Engineers

Yantra Design

Sushila Engineering

Primo Automation Systems

EagleTec CNC

Parvati Machine Tools and Services

Key Questions Answered

1. How big is the global CNC Tube-Sheet Drilling Machine market?
2. What is the demand of the global CNC Tube-Sheet Drilling Machine market?
3. What is the year over year growth of the global CNC Tube-Sheet Drilling Machine market?
4. What is the total value of the global CNC Tube-Sheet Drilling Machine market?
5. Who are the Major Players in the global CNC Tube-Sheet Drilling Machine market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 CNC Tube-Sheet Drilling Machine Introduction
- 1.2 World CNC Tube-Sheet Drilling Machine Supply & Forecast
 - 1.2.1 World CNC Tube-Sheet Drilling Machine Production Value (2021 & 2025 & 2032)
 - 1.2.2 World CNC Tube-Sheet Drilling Machine Production (2021-2032)
 - 1.2.3 World CNC Tube-Sheet Drilling Machine Pricing Trends (2021-2032)
- 1.3 World CNC Tube-Sheet Drilling Machine Production by Region (Based on Production Site)
 - 1.3.1 World CNC Tube-Sheet Drilling Machine Production Value by Region (2021-2032)
 - 1.3.2 World CNC Tube-Sheet Drilling Machine Production by Region (2021-2032)
 - 1.3.3 World CNC Tube-Sheet Drilling Machine Average Price by Region (2021-2032)
 - 1.3.4 North America CNC Tube-Sheet Drilling Machine Production (2021-2032)
 - 1.3.5 Europe CNC Tube-Sheet Drilling Machine Production (2021-2032)
 - 1.3.6 China CNC Tube-Sheet Drilling Machine Production (2021-2032)
 - 1.3.7 Japan CNC Tube-Sheet Drilling Machine Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 CNC Tube-Sheet Drilling Machine Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 CNC Tube-Sheet Drilling Machine Major Market Trends

2 DEMAND SUMMARY

- 2.1 World CNC Tube-Sheet Drilling Machine Demand (2021-2032)
- 2.2 World CNC Tube-Sheet Drilling Machine Consumption by Region
 - 2.2.1 World CNC Tube-Sheet Drilling Machine Consumption by Region (2021-2026)
 - 2.2.2 World CNC Tube-Sheet Drilling Machine Consumption Forecast by Region (2027-2032)
- 2.3 United States CNC Tube-Sheet Drilling Machine Consumption (2021-2032)
- 2.4 China CNC Tube-Sheet Drilling Machine Consumption (2021-2032)
- 2.5 Europe CNC Tube-Sheet Drilling Machine Consumption (2021-2032)
- 2.6 Japan CNC Tube-Sheet Drilling Machine Consumption (2021-2032)
- 2.7 South Korea CNC Tube-Sheet Drilling Machine Consumption (2021-2032)
- 2.8 ASEAN CNC Tube-Sheet Drilling Machine Consumption (2021-2032)
- 2.9 India CNC Tube-Sheet Drilling Machine Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World CNC Tube-Sheet Drilling Machine Production Value by Manufacturer (2021-2026)

3.2 World CNC Tube-Sheet Drilling Machine Production by Manufacturer (2021-2026)

3.3 World CNC Tube-Sheet Drilling Machine Average Price by Manufacturer (2021-2026)

3.4 CNC Tube-Sheet Drilling Machine Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global CNC Tube-Sheet Drilling Machine Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for CNC Tube-Sheet Drilling Machine in 2025

3.5.3 Global Concentration Ratios (CR8) for CNC Tube-Sheet Drilling Machine in 2025

3.6 CNC Tube-Sheet Drilling Machine Market: Overall Company Footprint Analysis

3.6.1 CNC Tube-Sheet Drilling Machine Market: Region Footprint

3.6.2 CNC Tube-Sheet Drilling Machine Market: Company Product Type Footprint

3.6.3 CNC Tube-Sheet Drilling Machine Market: Company Product Application

Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: CNC Tube-Sheet Drilling Machine Production Value Comparison

4.1.1 United States VS China: CNC Tube-Sheet Drilling Machine Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: CNC Tube-Sheet Drilling Machine Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: CNC Tube-Sheet Drilling Machine Production Comparison

4.2.1 United States VS China: CNC Tube-Sheet Drilling Machine Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: CNC Tube-Sheet Drilling Machine Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: CNC Tube-Sheet Drilling Machine Consumption Comparison

4.3.1 United States VS China: CNC Tube-Sheet Drilling Machine Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: CNC Tube-Sheet Drilling Machine Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based CNC Tube-Sheet Drilling Machine Manufacturers and Market Share, 2021-2026

4.4.1 United States Based CNC Tube-Sheet Drilling Machine Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value (2021-2026)

4.4.3 United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production (2021-2026)

4.5 China Based CNC Tube-Sheet Drilling Machine Manufacturers and Market Share

4.5.1 China Based CNC Tube-Sheet Drilling Machine Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value (2021-2026)

4.5.3 China Based Manufacturers CNC Tube-Sheet Drilling Machine Production (2021-2026)

4.6 Rest of World Based CNC Tube-Sheet Drilling Machine Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based CNC Tube-Sheet Drilling Machine Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World CNC Tube-Sheet Drilling Machine Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Carbide Drilling

5.2.2 Gundrilling

5.2.3 STS Drilling

5.2.4 Hybrid BTA & Gundrilling

5.2.5 Others

5.3 Market Segment by Type

- 5.3.1 World CNC Tube-Sheet Drilling Machine Production by Type (2021-2032)
- 5.3.2 World CNC Tube-Sheet Drilling Machine Production Value by Type (2021-2032)
- 5.3.3 World CNC Tube-Sheet Drilling Machine Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY MACHINE ARCHITECTURE

6.1 World CNC Tube-Sheet Drilling Machine Market Size Overview by Machine Architecture: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Machine Architecture

- 6.2.1 Bridge-Type
- 6.2.2 Floor-Type
- 6.2.3 Horizontal Dedicated Deep-Hole Type
- 6.2.4 Rotary-Table
- 6.2.5 Others

6.3 Market Segment by Machine Architecture

- 6.3.1 World CNC Tube-Sheet Drilling Machine Production by Machine Architecture (2021-2032)
- 6.3.2 World CNC Tube-Sheet Drilling Machine Production Value by Machine Architecture (2021-2032)
- 6.3.3 World CNC Tube-Sheet Drilling Machine Average Price by Machine Architecture (2021-2032)

7 MARKET ANALYSIS BY MAXIMUM DRILLING DIAMETER

7.1 World CNC Tube-Sheet Drilling Machine Market Size Overview by Maximum Drilling Diameter: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Maximum Drilling Diameter

- 7.2.1 Drilling range ?6–?40 mm
- 7.2.2 Drilling ?10–?60 mm
- 7.2.3 Drilling ?14–?70 mm
- 7.2.4 Drilling ?14–?80 mm

7.3 Market Segment by Maximum Drilling Diameter

- 7.3.1 World CNC Tube-Sheet Drilling Machine Production by Maximum Drilling Diameter (2021-2032)
- 7.3.2 World CNC Tube-Sheet Drilling Machine Production Value by Maximum Drilling Diameter (2021-2032)
- 7.3.3 World CNC Tube-Sheet Drilling Machine Average Price by Maximum Drilling Diameter (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World CNC Tube-Sheet Drilling Machine Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Petrochemical and Chemical Processing

8.2.2 Power Generation and Nuclear

8.2.3 Industrial Heat Exchanger and Boiler Manufacturing

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World CNC Tube-Sheet Drilling Machine Production by Application (2021-2032)

8.3.2 World CNC Tube-Sheet Drilling Machine Production Value by Application (2021-2032)

8.3.3 World CNC Tube-Sheet Drilling Machine Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 UNISIG

9.1.1 UNISIG Details

9.1.2 UNISIG Major Business

9.1.3 UNISIG CNC Tube-Sheet Drilling Machine Product and Services

9.1.4 UNISIG CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 UNISIG Recent Developments/Updates

9.1.6 UNISIG Competitive Strengths & Weaknesses

9.2 Camozzi Machine Tools

9.2.1 Camozzi Machine Tools Details

9.2.2 Camozzi Machine Tools Major Business

9.2.3 Camozzi Machine Tools CNC Tube-Sheet Drilling Machine Product and Services

9.2.4 Camozzi Machine Tools CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Camozzi Machine Tools Recent Developments/Updates

9.2.6 Camozzi Machine Tools Competitive Strengths & Weaknesses

9.3 Galbiati Group

9.3.1 Galbiati Group Details

9.3.2 Galbiati Group Major Business

9.3.3 Galbiati Group CNC Tube-Sheet Drilling Machine Product and Services

9.3.4 Galbiati Group CNC Tube-Sheet Drilling Machine Production, Price, Value,

Gross Margin and Market Share (2021-2026)

9.3.5 Galbiati Group Recent Developments/Updates

9.3.6 Galbiati Group Competitive Strengths & Weaknesses

9.4 Precihole Machine Tools

9.4.1 Precihole Machine Tools Details

9.4.2 Precihole Machine Tools Major Business

9.4.3 Precihole Machine Tools CNC Tube-Sheet Drilling Machine Product and Services

9.4.4 Precihole Machine Tools CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Precihole Machine Tools Recent Developments/Updates

9.4.6 Precihole Machine Tools Competitive Strengths & Weaknesses

9.5 Shandong FIN CNC Machine

9.5.1 Shandong FIN CNC Machine Details

9.5.2 Shandong FIN CNC Machine Major Business

9.5.3 Shandong FIN CNC Machine CNC Tube-Sheet Drilling Machine Product and Services

9.5.4 Shandong FIN CNC Machine CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.5.5 Shandong FIN CNC Machine Recent Developments/Updates

9.5.6 Shandong FIN CNC Machine Competitive Strengths & Weaknesses

9.6 Shuochao CNC Equipment

9.6.1 Shuochao CNC Equipment Details

9.6.2 Shuochao CNC Equipment Major Business

9.6.3 Shuochao CNC Equipment CNC Tube-Sheet Drilling Machine Product and Services

9.6.4 Shuochao CNC Equipment CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.6.5 Shuochao CNC Equipment Recent Developments/Updates

9.6.6 Shuochao CNC Equipment Competitive Strengths & Weaknesses

9.7 Shin-IL Machinery

9.7.1 Shin-IL Machinery Details

9.7.2 Shin-IL Machinery Major Business

9.7.3 Shin-IL Machinery CNC Tube-Sheet Drilling Machine Product and Services

9.7.4 Shin-IL Machinery CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.7.5 Shin-IL Machinery Recent Developments/Updates

9.7.6 Shin-IL Machinery Competitive Strengths & Weaknesses

9.8 INSUNG MACHINE TOOLS

- 9.8.1 INSUNG MACHINE TOOLS Details
- 9.8.2 INSUNG MACHINE TOOLS Major Business
- 9.8.3 INSUNG MACHINE TOOLS CNC Tube-Sheet Drilling Machine Product and Services
- 9.8.4 INSUNG MACHINE TOOLS CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.8.5 INSUNG MACHINE TOOLS Recent Developments/Updates
- 9.8.6 INSUNG MACHINE TOOLS Competitive Strengths & Weaknesses
- 9.9 Shandong Sunrise CNC
 - 9.9.1 Shandong Sunrise CNC Details
 - 9.9.2 Shandong Sunrise CNC Major Business
 - 9.9.3 Shandong Sunrise CNC CNC Tube-Sheet Drilling Machine Product and Services
 - 9.9.4 Shandong Sunrise CNC CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.9.5 Shandong Sunrise CNC Recent Developments/Updates
 - 9.9.6 Shandong Sunrise CNC Competitive Strengths & Weaknesses
- 9.10 Jinan Zhangli Machinery
 - 9.10.1 Jinan Zhangli Machinery Details
 - 9.10.2 Jinan Zhangli Machinery Major Business
 - 9.10.3 Jinan Zhangli Machinery CNC Tube-Sheet Drilling Machine Product and Services
 - 9.10.4 Jinan Zhangli Machinery CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Jinan Zhangli Machinery Recent Developments/Updates
 - 9.10.6 Jinan Zhangli Machinery Competitive Strengths & Weaknesses
- 9.11 Dezhou Guanlu
 - 9.11.1 Dezhou Guanlu Details
 - 9.11.2 Dezhou Guanlu Major Business
 - 9.11.3 Dezhou Guanlu CNC Tube-Sheet Drilling Machine Product and Services
 - 9.11.4 Dezhou Guanlu CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Dezhou Guanlu Recent Developments/Updates
 - 9.11.6 Dezhou Guanlu Competitive Strengths & Weaknesses
- 9.12 Changzhou Yikefeng
 - 9.12.1 Changzhou Yikefeng Details
 - 9.12.2 Changzhou Yikefeng Major Business
 - 9.12.3 Changzhou Yikefeng CNC Tube-Sheet Drilling Machine Product and Services
 - 9.12.4 Changzhou Yikefeng CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.12.5 Changzhou Yikefeng Recent Developments/Updates
- 9.12.6 Changzhou Yikefeng Competitive Strengths & Weaknesses
- 9.13 Dezhou Premach
 - 9.13.1 Dezhou Premach Details
 - 9.13.2 Dezhou Premach Major Business
 - 9.13.3 Dezhou Premach CNC Tube-Sheet Drilling Machine Product and Services
 - 9.13.4 Dezhou Premach CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.13.5 Dezhou Premach Recent Developments/Updates
 - 9.13.6 Dezhou Premach Competitive Strengths & Weaknesses
- 9.14 D.O.TECH
 - 9.14.1 D.O.TECH Details
 - 9.14.2 D.O.TECH Major Business
 - 9.14.3 D.O.TECH CNC Tube-Sheet Drilling Machine Product and Services
 - 9.14.4 D.O.TECH CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.14.5 D.O.TECH Recent Developments/Updates
 - 9.14.6 D.O.TECH Competitive Strengths & Weaknesses
- 9.15 Jinan Perfect Machine
 - 9.15.1 Jinan Perfect Machine Details
 - 9.15.2 Jinan Perfect Machine Major Business
 - 9.15.3 Jinan Perfect Machine CNC Tube-Sheet Drilling Machine Product and Services
 - 9.15.4 Jinan Perfect Machine CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.15.5 Jinan Perfect Machine Recent Developments/Updates
 - 9.15.6 Jinan Perfect Machine Competitive Strengths & Weaknesses
- 9.16 Shandong Yudong Sunshine
 - 9.16.1 Shandong Yudong Sunshine Details
 - 9.16.2 Shandong Yudong Sunshine Major Business
 - 9.16.3 Shandong Yudong Sunshine CNC Tube-Sheet Drilling Machine Product and Services
 - 9.16.4 Shandong Yudong Sunshine CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.16.5 Shandong Yudong Sunshine Recent Developments/Updates
 - 9.16.6 Shandong Yudong Sunshine Competitive Strengths & Weaknesses
- 9.17 Shandong Alles
 - 9.17.1 Shandong Alles Details
 - 9.17.2 Shandong Alles Major Business
 - 9.17.3 Shandong Alles CNC Tube-Sheet Drilling Machine Product and Services

9.17.4 Shandong Alles CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.17.5 Shandong Alles Recent Developments/Updates

9.17.6 Shandong Alles Competitive Strengths & Weaknesses

9.18 Guangdong Taihan

9.18.1 Guangdong Taihan Details

9.18.2 Guangdong Taihan Major Business

9.18.3 Guangdong Taihan CNC Tube-Sheet Drilling Machine Product and Services

9.18.4 Guangdong Taihan CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.18.5 Guangdong Taihan Recent Developments/Updates

9.18.6 Guangdong Taihan Competitive Strengths & Weaknesses

9.19 KYOEI CO., LTD.

9.19.1 KYOEI CO., LTD. Details

9.19.2 KYOEI CO., LTD. Major Business

9.19.3 KYOEI CO., LTD. CNC Tube-Sheet Drilling Machine Product and Services

9.19.4 KYOEI CO., LTD. CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.19.5 KYOEI CO., LTD. Recent Developments/Updates

9.19.6 KYOEI CO., LTD. Competitive Strengths & Weaknesses

9.20 Miroku Machine Tool Inc.

9.20.1 Miroku Machine Tool Inc. Details

9.20.2 Miroku Machine Tool Inc. Major Business

9.20.3 Miroku Machine Tool Inc. CNC Tube-Sheet Drilling Machine Product and Services

9.20.4 Miroku Machine Tool Inc. CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.20.5 Miroku Machine Tool Inc. Recent Developments/Updates

9.20.6 Miroku Machine Tool Inc. Competitive Strengths & Weaknesses

9.21 Competence Techno Engineers

9.21.1 Competence Techno Engineers Details

9.21.2 Competence Techno Engineers Major Business

9.21.3 Competence Techno Engineers CNC Tube-Sheet Drilling Machine Product and Services

9.21.4 Competence Techno Engineers CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.21.5 Competence Techno Engineers Recent Developments/Updates

9.21.6 Competence Techno Engineers Competitive Strengths & Weaknesses

9.22 Yantra Design

- 9.22.1 Yantra Design Details
- 9.22.2 Yantra Design Major Business
- 9.22.3 Yantra Design CNC Tube-Sheet Drilling Machine Product and Services
- 9.22.4 Yantra Design CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.22.5 Yantra Design Recent Developments/Updates
- 9.22.6 Yantra Design Competitive Strengths & Weaknesses
- 9.23 Sushila Engineering
 - 9.23.1 Sushila Engineering Details
 - 9.23.2 Sushila Engineering Major Business
 - 9.23.3 Sushila Engineering CNC Tube-Sheet Drilling Machine Product and Services
 - 9.23.4 Sushila Engineering CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.23.5 Sushila Engineering Recent Developments/Updates
 - 9.23.6 Sushila Engineering Competitive Strengths & Weaknesses
- 9.24 Primo Automation Systems
 - 9.24.1 Primo Automation Systems Details
 - 9.24.2 Primo Automation Systems Major Business
 - 9.24.3 Primo Automation Systems CNC Tube-Sheet Drilling Machine Product and Services
 - 9.24.4 Primo Automation Systems CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.24.5 Primo Automation Systems Recent Developments/Updates
 - 9.24.6 Primo Automation Systems Competitive Strengths & Weaknesses
- 9.25 EagleTec CNC
 - 9.25.1 EagleTec CNC Details
 - 9.25.2 EagleTec CNC Major Business
 - 9.25.3 EagleTec CNC CNC Tube-Sheet Drilling Machine Product and Services
 - 9.25.4 EagleTec CNC CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.25.5 EagleTec CNC Recent Developments/Updates
 - 9.25.6 EagleTec CNC Competitive Strengths & Weaknesses
- 9.26 Parvati Machine Tools and Services
 - 9.26.1 Parvati Machine Tools and Services Details
 - 9.26.2 Parvati Machine Tools and Services Major Business
 - 9.26.3 Parvati Machine Tools and Services CNC Tube-Sheet Drilling Machine Product and Services
 - 9.26.4 Parvati Machine Tools and Services CNC Tube-Sheet Drilling Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.26.5 Parvati Machine Tools and Services Recent Developments/Updates
- 9.26.6 Parvati Machine Tools and Services Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 CNC Tube-Sheet Drilling Machine Industry Chain
- 10.2 CNC Tube-Sheet Drilling Machine Upstream Analysis
 - 10.2.1 CNC Tube-Sheet Drilling Machine Core Raw Materials
 - 10.2.2 Main Manufacturers of CNC Tube-Sheet Drilling Machine Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 CNC Tube-Sheet Drilling Machine Production Mode
- 10.6 CNC Tube-Sheet Drilling Machine Procurement Model
- 10.7 CNC Tube-Sheet Drilling Machine Industry Sales Model and Sales Channels
 - 10.7.1 CNC Tube-Sheet Drilling Machine Sales Model
 - 10.7.2 CNC Tube-Sheet Drilling Machine Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

- 12.1 Methodology
- 12.2 Research Process and Data Source
- 12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World CNC Tube-Sheet Drilling Machine Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World CNC Tube-Sheet Drilling Machine Production Value by Region (2021-2026) & (USD Million)

Table 3. World CNC Tube-Sheet Drilling Machine Production Value by Region (2027-2032) & (USD Million)

Table 4. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Region (2021-2026)

Table 5. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Region (2027-2032)

Table 6. World CNC Tube-Sheet Drilling Machine Production by Region (2021-2026) & (K Units)

Table 7. World CNC Tube-Sheet Drilling Machine Production by Region (2027-2032) & (K Units)

Table 8. World CNC Tube-Sheet Drilling Machine Production Market Share by Region (2021-2026)

Table 9. World CNC Tube-Sheet Drilling Machine Production Market Share by Region (2027-2032)

Table 10. World CNC Tube-Sheet Drilling Machine Average Price by Region (2021-2026) & (US\$/Unit)

Table 11. World CNC Tube-Sheet Drilling Machine Average Price by Region (2027-2032) & (US\$/Unit)

Table 12. CNC Tube-Sheet Drilling Machine Major Market Trends

Table 13. World CNC Tube-Sheet Drilling Machine Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World CNC Tube-Sheet Drilling Machine Consumption by Region (2021-2026) & (K Units)

Table 15. World CNC Tube-Sheet Drilling Machine Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World CNC Tube-Sheet Drilling Machine Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key CNC Tube-Sheet Drilling Machine Producers in 2025

Table 18. World CNC Tube-Sheet Drilling Machine Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key CNC Tube-Sheet Drilling Machine Producers in 2025

Table 20. World CNC Tube-Sheet Drilling Machine Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 21. Global CNC Tube-Sheet Drilling Machine Company Evaluation Quadrant

Table 22. World CNC Tube-Sheet Drilling Machine Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and CNC Tube-Sheet Drilling Machine Production Site of Key Manufacturer

Table 24. CNC Tube-Sheet Drilling Machine Market: Company Product Type Footprint

Table 25. CNC Tube-Sheet Drilling Machine Market: Company Product Application Footprint

Table 26. CNC Tube-Sheet Drilling Machine Competitive Factors

Table 27. CNC Tube-Sheet Drilling Machine New Entrant and Capacity Expansion Plans

Table 28. CNC Tube-Sheet Drilling Machine Mergers & Acquisitions Activity

Table 29. United States VS China CNC Tube-Sheet Drilling Machine Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China CNC Tube-Sheet Drilling Machine Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China CNC Tube-Sheet Drilling Machine Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based CNC Tube-Sheet Drilling Machine Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production Market Share (2021-2026)

Table 37. China Based CNC Tube-Sheet Drilling Machine Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers CNC Tube-Sheet Drilling Machine Production,

(2021-2026) & (K Units)

Table 41. China Based Manufacturers CNC Tube-Sheet Drilling Machine Production Market Share (2021-2026)

Table 42. Rest of World Based CNC Tube-Sheet Drilling Machine Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production Market Share (2021-2026)

Table 47. World CNC Tube-Sheet Drilling Machine Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World CNC Tube-Sheet Drilling Machine Production by Type (2021-2026) & (K Units)

Table 49. World CNC Tube-Sheet Drilling Machine Production by Type (2027-2032) & (K Units)

Table 50. World CNC Tube-Sheet Drilling Machine Production Value by Type (2021-2026) & (USD Million)

Table 51. World CNC Tube-Sheet Drilling Machine Production Value by Type (2027-2032) & (USD Million)

Table 52. World CNC Tube-Sheet Drilling Machine Average Price by Type (2021-2026) & (US\$/Unit)

Table 53. World CNC Tube-Sheet Drilling Machine Average Price by Type (2027-2032) & (US\$/Unit)

Table 54. World CNC Tube-Sheet Drilling Machine Production Value by Machine Architecture, (USD Million), 2021 & 2025 & 2032

Table 55. World CNC Tube-Sheet Drilling Machine Production by Machine Architecture (2021-2026) & (K Units)

Table 56. World CNC Tube-Sheet Drilling Machine Production by Machine Architecture (2027-2032) & (K Units)

Table 57. World CNC Tube-Sheet Drilling Machine Production Value by Machine Architecture (2021-2026) & (USD Million)

Table 58. World CNC Tube-Sheet Drilling Machine Production Value by Machine Architecture (2027-2032) & (USD Million)

Table 59. World CNC Tube-Sheet Drilling Machine Average Price by Machine Architecture (2021-2026) & (US\$/Unit)

Table 60. World CNC Tube-Sheet Drilling Machine Average Price by Machine Architecture (2027-2032) & (US\$/Unit)

Table 61. World CNC Tube-Sheet Drilling Machine Production Value by Maximum Drilling Diameter, (USD Million), 2021 & 2025 & 2032

Table 62. World CNC Tube-Sheet Drilling Machine Production by Maximum Drilling Diameter (2021-2026) & (K Units)

Table 63. World CNC Tube-Sheet Drilling Machine Production by Maximum Drilling Diameter (2027-2032) & (K Units)

Table 64. World CNC Tube-Sheet Drilling Machine Production Value by Maximum Drilling Diameter (2021-2026) & (USD Million)

Table 65. World CNC Tube-Sheet Drilling Machine Production Value by Maximum Drilling Diameter (2027-2032) & (USD Million)

Table 66. World CNC Tube-Sheet Drilling Machine Average Price by Maximum Drilling Diameter (2021-2026) & (US\$/Unit)

Table 67. World CNC Tube-Sheet Drilling Machine Average Price by Maximum Drilling Diameter (2027-2032) & (US\$/Unit)

Table 68. World CNC Tube-Sheet Drilling Machine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World CNC Tube-Sheet Drilling Machine Production by Application (2021-2026) & (K Units)

Table 70. World CNC Tube-Sheet Drilling Machine Production by Application (2027-2032) & (K Units)

Table 71. World CNC Tube-Sheet Drilling Machine Production Value by Application (2021-2026) & (USD Million)

Table 72. World CNC Tube-Sheet Drilling Machine Production Value by Application (2027-2032) & (USD Million)

Table 73. World CNC Tube-Sheet Drilling Machine Average Price by Application (2021-2026) & (US\$/Unit)

Table 74. World CNC Tube-Sheet Drilling Machine Average Price by Application (2027-2032) & (US\$/Unit)

Table 75. UNISIG Basic Information, Manufacturing Base and Competitors

Table 76. UNISIG Major Business

Table 77. UNISIG CNC Tube-Sheet Drilling Machine Product and Services

Table 78. UNISIG CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. UNISIG Recent Developments/Updates

Table 80. UNISIG Competitive Strengths & Weaknesses

Table 81. Camozzi Machine Tools Basic Information, Manufacturing Base and

Competitors

Table 82. Camozzi Machine Tools Major Business

Table 83. Camozzi Machine Tools CNC Tube-Sheet Drilling Machine Product and Services

Table 84. Camozzi Machine Tools CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Camozzi Machine Tools Recent Developments/Updates

Table 86. Camozzi Machine Tools Competitive Strengths & Weaknesses

Table 87. Galbiati Group Basic Information, Manufacturing Base and Competitors

Table 88. Galbiati Group Major Business

Table 89. Galbiati Group CNC Tube-Sheet Drilling Machine Product and Services

Table 90. Galbiati Group CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Galbiati Group Recent Developments/Updates

Table 92. Galbiati Group Competitive Strengths & Weaknesses

Table 93. Precihole Machine Tools Basic Information, Manufacturing Base and Competitors

Table 94. Precihole Machine Tools Major Business

Table 95. Precihole Machine Tools CNC Tube-Sheet Drilling Machine Product and Services

Table 96. Precihole Machine Tools CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Precihole Machine Tools Recent Developments/Updates

Table 98. Precihole Machine Tools Competitive Strengths & Weaknesses

Table 99. Shandong FIN CNC Machine Basic Information, Manufacturing Base and Competitors

Table 100. Shandong FIN CNC Machine Major Business

Table 101. Shandong FIN CNC Machine CNC Tube-Sheet Drilling Machine Product and Services

Table 102. Shandong FIN CNC Machine CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Shandong FIN CNC Machine Recent Developments/Updates

Table 104. Shandong FIN CNC Machine Competitive Strengths & Weaknesses

Table 105. Shuochao CNC Equipment Basic Information, Manufacturing Base and Competitors

Table 106. Shuochao CNC Equipment Major Business
Table 107. Shuochao CNC Equipment CNC Tube-Sheet Drilling Machine Product and Services
Table 108. Shuochao CNC Equipment CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. Shuochao CNC Equipment Recent Developments/Updates
Table 110. Shuochao CNC Equipment Competitive Strengths & Weaknesses
Table 111. Shin-IL Machinery Basic Information, Manufacturing Base and Competitors
Table 112. Shin-IL Machinery Major Business
Table 113. Shin-IL Machinery CNC Tube-Sheet Drilling Machine Product and Services
Table 114. Shin-IL Machinery CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Shin-IL Machinery Recent Developments/Updates
Table 116. Shin-IL Machinery Competitive Strengths & Weaknesses
Table 117. INSUNG MACHINE TOOLS Basic Information, Manufacturing Base and Competitors
Table 118. INSUNG MACHINE TOOLS Major Business
Table 119. INSUNG MACHINE TOOLS CNC Tube-Sheet Drilling Machine Product and Services
Table 120. INSUNG MACHINE TOOLS CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. INSUNG MACHINE TOOLS Recent Developments/Updates
Table 122. INSUNG MACHINE TOOLS Competitive Strengths & Weaknesses
Table 123. Shandong Sunrise CNC Basic Information, Manufacturing Base and Competitors
Table 124. Shandong Sunrise CNC Major Business
Table 125. Shandong Sunrise CNC CNC Tube-Sheet Drilling Machine Product and Services
Table 126. Shandong Sunrise CNC CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Shandong Sunrise CNC Recent Developments/Updates
Table 128. Shandong Sunrise CNC Competitive Strengths & Weaknesses
Table 129. Jinan Zhangli Machinery Basic Information, Manufacturing Base and Competitors
Table 130. Jinan Zhangli Machinery Major Business

Table 131. Jinan Zhangli Machinery CNC Tube-Sheet Drilling Machine Product and Services

Table 132. Jinan Zhangli Machinery CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Jinan Zhangli Machinery Recent Developments/Updates

Table 134. Jinan Zhangli Machinery Competitive Strengths & Weaknesses

Table 135. Dezhou Guanlu Basic Information, Manufacturing Base and Competitors

Table 136. Dezhou Guanlu Major Business

Table 137. Dezhou Guanlu CNC Tube-Sheet Drilling Machine Product and Services

Table 138. Dezhou Guanlu CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Dezhou Guanlu Recent Developments/Updates

Table 140. Dezhou Guanlu Competitive Strengths & Weaknesses

Table 141. Changzhou Yikefeng Basic Information, Manufacturing Base and Competitors

Table 142. Changzhou Yikefeng Major Business

Table 143. Changzhou Yikefeng CNC Tube-Sheet Drilling Machine Product and Services

Table 144. Changzhou Yikefeng CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Changzhou Yikefeng Recent Developments/Updates

Table 146. Changzhou Yikefeng Competitive Strengths & Weaknesses

Table 147. Dezhou Premach Basic Information, Manufacturing Base and Competitors

Table 148. Dezhou Premach Major Business

Table 149. Dezhou Premach CNC Tube-Sheet Drilling Machine Product and Services

Table 150. Dezhou Premach CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Dezhou Premach Recent Developments/Updates

Table 152. Dezhou Premach Competitive Strengths & Weaknesses

Table 153. D.O.TECH Basic Information, Manufacturing Base and Competitors

Table 154. D.O.TECH Major Business

Table 155. D.O.TECH CNC Tube-Sheet Drilling Machine Product and Services

Table 156. D.O.TECH CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. D.O.TECH Recent Developments/Updates
Table 158. D.O.TECH Competitive Strengths & Weaknesses
Table 159. Jinan Perfect Machine Basic Information, Manufacturing Base and Competitors
Table 160. Jinan Perfect Machine Major Business
Table 161. Jinan Perfect Machine CNC Tube-Sheet Drilling Machine Product and Services
Table 162. Jinan Perfect Machine CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Jinan Perfect Machine Recent Developments/Updates
Table 164. Jinan Perfect Machine Competitive Strengths & Weaknesses
Table 165. Shandong Yudong Sunshine Basic Information, Manufacturing Base and Competitors
Table 166. Shandong Yudong Sunshine Major Business
Table 167. Shandong Yudong Sunshine CNC Tube-Sheet Drilling Machine Product and Services
Table 168. Shandong Yudong Sunshine CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Shandong Yudong Sunshine Recent Developments/Updates
Table 170. Shandong Yudong Sunshine Competitive Strengths & Weaknesses
Table 171. Shandong Alles Basic Information, Manufacturing Base and Competitors
Table 172. Shandong Alles Major Business
Table 173. Shandong Alles CNC Tube-Sheet Drilling Machine Product and Services
Table 174. Shandong Alles CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Shandong Alles Recent Developments/Updates
Table 176. Shandong Alles Competitive Strengths & Weaknesses
Table 177. Guangdong Taihan Basic Information, Manufacturing Base and Competitors
Table 178. Guangdong Taihan Major Business
Table 179. Guangdong Taihan CNC Tube-Sheet Drilling Machine Product and Services
Table 180. Guangdong Taihan CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Guangdong Taihan Recent Developments/Updates
Table 182. Guangdong Taihan Competitive Strengths & Weaknesses
Table 183. KYOEI CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 184. KYOEI CO., LTD. Major Business

Table 185. KYOEI CO., LTD. CNC Tube-Sheet Drilling Machine Product and Services

Table 186. KYOEI CO., LTD. CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 187. KYOEI CO., LTD. Recent Developments/Updates

Table 188. KYOEI CO., LTD. Competitive Strengths & Weaknesses

Table 189. Miroku Machine Tool Inc. Basic Information, Manufacturing Base and Competitors

Table 190. Miroku Machine Tool Inc. Major Business

Table 191. Miroku Machine Tool Inc. CNC Tube-Sheet Drilling Machine Product and Services

Table 192. Miroku Machine Tool Inc. CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 193. Miroku Machine Tool Inc. Recent Developments/Updates

Table 194. Miroku Machine Tool Inc. Competitive Strengths & Weaknesses

Table 195. Competence Techno Engineers Basic Information, Manufacturing Base and Competitors

Table 196. Competence Techno Engineers Major Business

Table 197. Competence Techno Engineers CNC Tube-Sheet Drilling Machine Product and Services

Table 198. Competence Techno Engineers CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 199. Competence Techno Engineers Recent Developments/Updates

Table 200. Competence Techno Engineers Competitive Strengths & Weaknesses

Table 201. Yantra Design Basic Information, Manufacturing Base and Competitors

Table 202. Yantra Design Major Business

Table 203. Yantra Design CNC Tube-Sheet Drilling Machine Product and Services

Table 204. Yantra Design CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 205. Yantra Design Recent Developments/Updates

Table 206. Yantra Design Competitive Strengths & Weaknesses

Table 207. Sushila Engineering Basic Information, Manufacturing Base and Competitors

Table 208. Sushila Engineering Major Business

Table 209. Sushila Engineering CNC Tube-Sheet Drilling Machine Product and Services

Table 210. Sushila Engineering CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 211. Sushila Engineering Recent Developments/Updates

Table 212. Sushila Engineering Competitive Strengths & Weaknesses

Table 213. Primo Automation Systems Basic Information, Manufacturing Base and Competitors

Table 214. Primo Automation Systems Major Business

Table 215. Primo Automation Systems CNC Tube-Sheet Drilling Machine Product and Services

Table 216. Primo Automation Systems CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 217. Primo Automation Systems Recent Developments/Updates

Table 218. Primo Automation Systems Competitive Strengths & Weaknesses

Table 219. EagleTec CNC Basic Information, Manufacturing Base and Competitors

Table 220. EagleTec CNC Major Business

Table 221. EagleTec CNC CNC Tube-Sheet Drilling Machine Product and Services

Table 222. EagleTec CNC CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 223. EagleTec CNC Recent Developments/Updates

Table 224. EagleTec CNC Competitive Strengths & Weaknesses

Table 225. Parvati Machine Tools and Services Basic Information, Manufacturing Base and Competitors

Table 226. Parvati Machine Tools and Services Major Business

Table 227. Parvati Machine Tools and Services CNC Tube-Sheet Drilling Machine Product and Services

Table 228. Parvati Machine Tools and Services CNC Tube-Sheet Drilling Machine Production (K Units), Price (US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 229. Parvati Machine Tools and Services Recent Developments/Updates

Table 230. Parvati Machine Tools and Services Competitive Strengths & Weaknesses

Table 231. Global Key Players of CNC Tube-Sheet Drilling Machine Upstream (Raw Materials)

Table 232. Global CNC Tube-Sheet Drilling Machine Typical Customers

Table 233. CNC Tube-Sheet Drilling Machine Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. CNC Tube-Sheet Drilling Machine Picture

Figure 2. World CNC Tube-Sheet Drilling Machine Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World CNC Tube-Sheet Drilling Machine Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World CNC Tube-Sheet Drilling Machine Production (2021-2032) & (K Units)

Figure 5. World CNC Tube-Sheet Drilling Machine Average Price (2021-2032) & (US\$/Unit)

Figure 6. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Region (2021-2032)

Figure 7. World CNC Tube-Sheet Drilling Machine Production Market Share by Region (2021-2032)

Figure 8. North America CNC Tube-Sheet Drilling Machine Production (2021-2032) & (K Units)

Figure 9. Europe CNC Tube-Sheet Drilling Machine Production (2021-2032) & (K Units)

Figure 10. China CNC Tube-Sheet Drilling Machine Production (2021-2032) & (K Units)

Figure 11. Japan CNC Tube-Sheet Drilling Machine Production (2021-2032) & (K Units)

Figure 12. CNC Tube-Sheet Drilling Machine Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 15. World CNC Tube-Sheet Drilling Machine Consumption Market Share by Region (2021-2032)

Figure 16. United States CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 17. China CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 18. Europe CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 19. Japan CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 20. South Korea CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 21. ASEAN CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 22. India CNC Tube-Sheet Drilling Machine Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of CNC Tube-Sheet Drilling Machine by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for CNC Tube-Sheet Drilling Machine Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for CNC Tube-Sheet Drilling Machine Markets in 2025

Figure 26. United States VS China: CNC Tube-Sheet Drilling Machine Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: CNC Tube-Sheet Drilling Machine Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: CNC Tube-Sheet Drilling Machine Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers CNC Tube-Sheet Drilling Machine Production Market Share 2025

Figure 30. China Based Manufacturers CNC Tube-Sheet Drilling Machine Production Market Share 2025

Figure 31. Rest of World Based Manufacturers CNC Tube-Sheet Drilling Machine Production Market Share 2025

Figure 32. World CNC Tube-Sheet Drilling Machine Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Type in 2025

Figure 34. Carbide Drilling

Figure 35. Gundrilling

Figure 36. STS Drilling

Figure 37. Hybrid BTA & Gundrilling

Figure 38. Others

Figure 39. World CNC Tube-Sheet Drilling Machine Production Market Share by Type (2021-2032)

Figure 40. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Type (2021-2032)

Figure 41. World CNC Tube-Sheet Drilling Machine Average Price by Type (2021-2032) & (US\$/Unit)

Figure 42. World CNC Tube-Sheet Drilling Machine Production Value by Machine Architecture, (USD Million), 2021 & 2025 & 2032

Figure 43. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Machine Architecture in 2025

Figure 44. Bridge-Type

Figure 45. Floor-Type

Figure 46. Horizontal Dedicated Deep-Hole Type

Figure 47. Rotary-Table

Figure 48. Others

Figure 49. World CNC Tube-Sheet Drilling Machine Production Market Share by Machine Architecture (2021-2032)

Figure 50. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Machine Architecture (2021-2032)

Figure 51. World CNC Tube-Sheet Drilling Machine Average Price by Machine Architecture (2021-2032) & (US\$/Unit)

Figure 52. World CNC Tube-Sheet Drilling Machine Production Value by Maximum Drilling Diameter, (USD Million), 2021 & 2025 & 2032

Figure 53. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Maximum Drilling Diameter in 2025

Figure 54. Drilling range 6–40 mm

Figure 55. Drilling 10–60 mm

Figure 56. Drilling 14–70 mm

Figure 57. Drilling 14–80 mm

Figure 58. World CNC Tube-Sheet Drilling Machine Production Market Share by Maximum Drilling Diameter (2021-2032)

Figure 59. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Maximum Drilling Diameter (2021-2032)

Figure 60. World CNC Tube-Sheet Drilling Machine Average Price by Maximum Drilling Diameter (2021-2032) & (US\$/Unit)

Figure 61. World CNC Tube-Sheet Drilling Machine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 62. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Application in 2025

Figure 63. Petrochemical and Chemical Processing

Figure 64. Power Generation and Nuclear

Figure 65. Industrial Heat Exchanger and Boiler Manufacturing

Figure 66. Others

Figure 67. World CNC Tube-Sheet Drilling Machine Production Market Share by Application (2021-2032)

Figure 68. World CNC Tube-Sheet Drilling Machine Production Value Market Share by Application (2021-2032)

Figure 69. World CNC Tube-Sheet Drilling Machine Average Price by Application (2021-2032) & (US\$/Unit)

Figure 70. CNC Tube-Sheet Drilling Machine Industry Chain

Figure 71. CNC Tube-Sheet Drilling Machine Procurement Model

Figure 72. CNC Tube-Sheet Drilling Machine Sales Model

Figure 73. CNC Tube-Sheet Drilling Machine Sales Channels, Direct Sales, and Distribution

Figure 74. Methodology

Figure 75. Research Process and Data Source

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