

Global Heat Exchanger Tube Pulling Machine Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Heat Exchanger Tube Pulling Machine market size is expected to reach \$ 514 million by 2032, rising at a market growth of 4.5% CAGR during the forecast period (2026-2032).

Heat Exchanger Tube Pulling Machine refers to specialized maintenance equipment used to extract individual deteriorated, leaking, corroded or otherwise replaceable tubes and tube stubs from tube sheets during partial or complete retubing of shell-and-tube heat exchangers, condensers, chillers, boilers and related tubular heat-transfer equipment. The equipment typically combines a pulling gun or hydraulic ram, tube-engagement tooling, reaction components, a hydraulic power unit and application-specific accessories. Commercial configurations range from manual and single-stroke hydraulic pullers to semi-continuous and fully automatic continuous machines, while tube engagement may rely on threaded spears, internal collets, grippers or other proprietary mechanisms. Key technical parameters include applicable tube diameter, wall thickness, pulling capacity, hydraulic pressure, stroke, extraction speed, tool weight and compatibility with different tube-to-tubesheet joints. The core function is to generate controlled axial force sufficient to release the expanded tube joint and remove the old tube efficiently while limiting unnecessary damage to the tubesheet. Heat Exchanger Tube Pulling Machines are primarily used in scheduled shutdowns, turnaround maintenance and retubing projects across refining and petrochemicals, chemicals, power generation, HVAC and refrigeration, marine, desalination and other process industries.

Key Findings

In 2025, global Heat Exchanger Tube Pulling Machine production reached approximately 23,011 Units. The average price is approximately \$16,000

Automatic, continuous and semi-continuous systems represent about 42% of modeled 2025 product revenue

Single-stroke hydraulic systems account for about 36%, while manual and mechanical products contribute roughly 22%

Europe and North America concentrate advanced automated suppliers, while India has the deepest base of smaller specialist OEMs

Demand is predominantly maintenance-driven, with large retubing projects favoring higher-productivity hydraulic and continuous systems

Market Trends

The Heat Exchanger Tube Pulling Machine industry is shifting gradually from conventional manual and single-stroke hydraulic extraction toward faster semi-continuous and fully automatic pulling systems. The objective of this evolution is not simply to increase maximum pulling force, but to reduce non-productive steps between successive tubes, shorten exchanger turnaround time and lower labor intensity. Continuous systems from established suppliers already combine rapid hydraulic power packs with automatic or semi-automatic pulling guns, while newer internal-grip and collet concepts reduce dependence on repeated spear installation and removal. Elliott offers collet systems capable of automatically gripping, pulling and releasing tubes, KRAIS positions its ACTP as a continuous automatic pulling system, and BSA Tube Runner's Trident V3 combines automatic continuous extraction with multiple pulling-force options. Sugino has also developed internal-clamp concepts alongside conventional spear-type products. Another important direction is adaptation to different site conditions: electric-hydraulic configurations remain suitable for workshops and lower-risk environments, whereas pneumatic-hydraulic power packs are used for hazardous industrial locations. These developments indicate that the long-term product mix will increasingly favor productivity, ergonomics, faster tooling changes and application flexibility rather than maximum rated tonnage alone.

Market Dynamics

Drivers

The primary driver for Heat Exchanger Tube Pulling Machine demand is the recurring maintenance requirement associated with the large installed base of tubular heat-transfer equipment. Corrosion, erosion, fouling, leakage, thermal cycling and mechanical deterioration eventually create the need for partial or complete retubing, particularly in refineries, petrochemical plants, chemical facilities, power stations and other process industries where exchanger availability directly affects production continuity. At the same time, shutdown and turnaround schedules are becoming increasingly sensitive to labor hours and equipment availability, strengthening the economic case for hydraulic and continuous systems capable of removing tubes faster than traditional manual methods. Manufacturers increasingly position high-productivity equipment around reduced turnaround time, rapid extraction and controlled removal of expanded tube joints.

Restraints

Market expansion is constrained by the relatively long operating life of professional pulling equipment and by the project-based nature of retubing demand. A single system may be reused across multiple exchangers and multiple shutdown cycles, particularly when owned by specialist maintenance contractors. Rental availability further reduces the need for every end user to purchase dedicated equipment: KRAIS offers rental of certain pulling systems in Europe, Wicksteed provides rental options for its automatic equipment, and BSA Tube Runner operates a dedicated tube-pulling rental offering. In smaller maintenance jobs, economical manual tools or conventional single-stroke hydraulic pullers can remain adequate, limiting the addressable demand for higher-value automatic systems.

Opportunities

The most attractive market opportunity lies in upgrading the productivity of existing retubing operations rather than creating entirely new applications. Contractors handling large refinery, petrochemical, power-generation and condenser projects can justify higher-value continuous equipment when reduced extraction time translates directly into shorter outage duration and lower labor requirements. There is also room for greater adoption of internal-grip, collet and quick-engagement technologies that reduce

repetitive tooling operations. In China, India and other industrializing markets, localization creates an additional opportunity for regional manufacturers able to combine competitive equipment cost with reliable hydraulic systems, consumable tooling, repair support and faster parts availability. Suppliers that can provide an integrated retubing tool chain rather than a stand-alone pulling machine are positioned to capture a larger proportion of maintenance expenditure.

Challenges

A major technical challenge is the lack of a single operating condition applicable to all retubing projects. Tube diameter, material, wall thickness, corrosion condition, expansion geometry, tubesheet grooves, weld configuration and available working space can materially affect the force and tooling required for extraction. Elliott notes that tubesheet groove configurations can make tube removal more difficult and may require higher-power hydraulic equipment, while different applications can require combinations of collet and spear pulling. Equipment manufacturers must therefore maintain broad tooling ranges and application engineering capabilities while controlling tool weight, durability and hydraulic reliability. The fragmented nature of the supplier base also increases price competition at the lower end of the market, particularly where customers compare specialized equipment with locally manufactured general-purpose hydraulic alternatives.

Industry Chain Analysis

The upstream supply chain for Heat Exchanger Tube Pulling Machines consists primarily of precision-machined alloy and tool steels, hydraulic cylinders, pumps, valves, seals, hoses, pneumatic or electric drive components, bearings and control elements. Spears, collets, grippers, drawbars and other high-wear extraction components require particularly close dimensional control and material durability because engagement reliability directly affects extraction performance and the risk of tube or tubesheet damage. The midstream segment integrates hydraulic engineering, precision machining, pulling-gun design and application-specific tooling into complete manual, hydraulic, semi-continuous or automatic systems. Product value is therefore created not only by the power pack and pulling ram, but also by tooling compatibility, engineering know-how, consumables, replacement parts, repair capability and field support. Official product portfolios from established manufacturers typically combine tube removal with adjacent tube cutting, expanding, testing or maintenance tools, reflecting the importance

of supplying a broader retubing workflow rather than a single machine.

Downstream customers include heat-exchanger maintenance contractors, plant turnaround service providers, exchanger manufacturers and operators of refineries, chemical plants, power stations, HVAC facilities, marine systems and other process assets. Procurement behavior varies considerably by project scale. Large retubing campaigns place greater value on extraction speed, reliability and automatic operation, whereas partial tube replacement and inspection work can favor portable hydraulic or manual equipment. Rental and contractor-owned fleets are also important parts of the value chain because they allow high-value systems to serve multiple plants and projects, increasing equipment utilization while reducing direct ownership requirements for individual industrial sites.

Segment Insights

By product structure, automatic, continuous and semi-continuous Heat Exchanger Tube Pulling Machines are estimated to account for approximately 42% of modeled 2025 product revenue, making them the largest value segment despite representing a smaller proportion of unit shipments than simpler tools. Their higher revenue contribution reflects greater system complexity, hydraulic capacity, automation content and productivity value. Single-stroke hydraulic, stub, collet and spear-type systems collectively represent approximately 36% of modeled revenue and remain the broadest mainstream solution for industrial maintenance because they balance pulling force, portability and acquisition cost. Manual and mechanical equipment contributes the remaining roughly 22%, serving lower-volume, sampling, restricted-access and cost-sensitive applications.

The main structural growth opportunity is concentrated in continuous and semi-continuous systems rather than in basic manual tools. BSA Tube Runner offers automatic continuous equipment with 15-, 30- and 45-ton configurations and semi-automatic equipment reaching higher pulling-force ranges, while Wicksteed and KRAIS also commercialize continuous automatic systems. Nevertheless, conventional products are unlikely to disappear because project size and access conditions vary widely. Elliott explicitly positions manual pulling as an economical option for limited tube quantities, demonstrating that the market will continue to support multiple performance and price tiers rather than converge around one technology.

Downstream Market Opportunities

The most commercially attractive downstream opportunities are associated with industrial assets where tube replacement is performed in large batches and shutdown duration carries a high economic cost. Refining, petrochemicals and chemicals remain particularly suitable for higher-productivity pulling systems because exchanger maintenance is commonly integrated into scheduled turnarounds, while power-generation condensers and boilers create recurring demand from large tube populations. HVAC chillers, marine heat exchangers and desalination systems broaden the addressable application base, especially for portable hydraulic tools used in partial retubing. The opportunity differs by maintenance model: high-volume replacement favors continuous and automatic systems, whereas localized leakage, sampling and selective tube replacement support compact single-stroke and manual equipment. Major suppliers consequently offer products covering heat exchangers, boilers, condensers and chillers rather than focusing on a single end-use sector.

Regional Insights

From the supply side, Europe and North America are the most important centers for advanced Heat Exchanger Tube Pulling Machine technology. European suppliers have particularly strong representation in automatic and continuous extraction, with specialist manufacturers in Italy, the United Kingdom, Poland, the Netherlands, France and Germany. North America combines established tube-tool brands, broad aftermarket support and a large maintenance ecosystem. Japan has fewer dedicated suppliers but maintains differentiated technology in high-force and internal-grip pulling equipment. India stands out for having the deepest pool of smaller specialist OEMs, creating strong price competition and a broad export-oriented supply base. These regional differences make the industry less concentrated than its relatively narrow market size might suggest.

China has developed a localized manufacturing base around hydraulic tube tools and heat-exchanger maintenance equipment, particularly among specialist tube-expander and pulling-tool producers, but supplier transparency and brand concentration remain lower than in Europe and North America. South Korea, Taiwan, Southeast Asia and the Middle East currently show fewer independently confirmed dedicated OEMs and rely more heavily on imported equipment, distributors and maintenance-service channels. Demand opportunities across Asia and the Middle East are nevertheless supported by large refining, petrochemical, power and process-industry asset bases, creating room

for both international suppliers and regional manufacturers capable of providing local tooling, spare parts and service.

Competitive Landscape Analysis

The Heat Exchanger Tube Pulling Machine market is characterized by a relatively broad specialist supplier base rather than dominance by a small number of diversified industrial groups. The confirmed competitive pool contains approximately 33 core manufacturers, with the leading tier differentiated mainly by product breadth, automatic and continuous extraction capability, global distribution, installed maintenance expertise and support for adjacent retubing operations. Elliott maintains a broad portfolio spanning manual, collet and high-force hydraulic systems; Maus develops and manufactures dedicated stub, semi-automatic and continuous extraction equipment; EGI's Airetool platform covers hydraulic pullers, spear and gripper tooling; KRAIS, Wicksteed and BSA Tube Runner compete strongly in automatic and continuous systems; and Sugino provides both conventional spear-type and differentiated tube-pulling technologies. The second competitive layer is substantially more fragmented, comprising European niche engineering companies, Indian specialist tube-tool manufacturers and Chinese regional producers. Their competitive advantages are more closely linked to price, customization, local availability and maintenance support. As the industry matures, competitive differentiation is expected to shift progressively toward faster cycle times, lighter and more reliable pulling guns, broader tube-size compatibility, rapid-engagement tooling, hazardous-area power options and integrated retubing solutions rather than simple increases in nominal pulling force.

Report Scope

This report studies the global Heat Exchanger Tube Pulling Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Heat Exchanger Tube Pulling 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 Heat Exchanger Tube Pulling Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Heat Exchanger Tube Pulling Machine total production and demand, 2021-2032, (K Units)

Global Heat Exchanger Tube Pulling Machine total production value, 2021-2032, (USD Million)

Global Heat Exchanger Tube Pulling Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Heat Exchanger Tube Pulling Machine consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Heat Exchanger Tube Pulling Machine domestic production, consumption, key domestic manufacturers and share

Global Heat Exchanger Tube Pulling Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Heat Exchanger Tube Pulling Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Heat Exchanger Tube Pulling Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Heat Exchanger Tube Pulling 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 Elliott Tool Technologies, Maus Italia, POWERMASTER, KRAIS, Wicksteed Engineering, BSA Tube Runner, Sugino Machine, Thomas C. Wilson, TECO, TCEM, 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 Heat Exchanger Tube Pulling 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 Heat Exchanger Tube Pulling Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Heat Exchanger Tube Pulling Machine Market, Segmentation by Type:

Mechanical Tube Puller

Single-Stroke Hydraulic Tube Puller

Semi-Continuous Tube Puller

Fully Automatic Continuous Tube Puller

Others

Global Heat Exchanger Tube Pulling Machine Market, Segmentation by Rated Pulling Force:

?15 Tons

>15–30 Tons

>30 Tons

Global Heat Exchanger Tube Pulling Machine Market, Segmentation by Tube Engagement Method:

Threaded Spear-Type

Gripper Type

OD Grip Type

Global Heat Exchanger Tube Pulling Machine Market, Segmentation by Application:

Refining and Petrochemicals

Power Generation

Chemicals and Fertilizers

Others

Companies Profiled:

Elliott Tool Technologies

Maus Italia

POWERMASTER

KRAIS

Wicksteed Engineering

BSA Tube Runner

Sugino Machine

Thomas C. Wilson

TECO

TCEM

Technodata

Shingare Industries

Armstrong & Sons

Tubeex Engineering

Niksu Power Tools

Powertech Industrial Equipments

Torso Tools

Hanna

HEATEX

Bhartiya Enterprises

USA Industries

Perfect Tools And Equipments

Hefei Lanbo

Prime Tools India

Subzero Tube Tools

Iron Ace Industries

FUJI PIPE EXPANDER (SUZHOU)

Idrojet

Changzhou Haihe Hydraulic Tube Expander Co., Ltd.

Wujiang City Tongda Expander Factory

Yuechang Machinery Jiangsu Co., Ltd.

Key Questions Answered

1. How big is the global Heat Exchanger Tube Pulling Machine market?
2. What is the demand of the global Heat Exchanger Tube Pulling Machine market?
3. What is the year over year growth of the global Heat Exchanger Tube Pulling Machine market?
4. What is the total value of the global Heat Exchanger Tube Pulling Machine market?
5. Who are the Major Players in the global Heat Exchanger Tube Pulling Machine

market?

6. What are the growth factors driving the market demand?

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