

Global Orbital Tube-to-Tubesheet Welders Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Orbital Tube-to-Tubesheet Welders market size is expected to reach \$ 136 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Tube-to-Tubesheet Orbital Welding Machines are specialized automated welding equipment used to complete the welding joints between heat exchange tubes, boiler tubes, condenser tubes, and other heat transfer tubes and tubesheets. During operation, the tubes and tubesheets are generally fixed in position, while a dedicated welding head drives a tungsten electrode torch to continuously rotate around the tube opening, completing circumferential welds according to preset welding programs. The equipment mainly consists of a digital welding power source, tube-to-tubesheet orbital welding head, controller, wire feeding system, water cooling system, shielding gas system, positioning mandrel, suspension balancing device, and connecting cables. Major product forms include portable tube-to-tubesheet welders, suspended tube-to-tubesheet welders, open rotating welding heads, closed welding heads, internal bore welding equipment, gantry-type multi-axis welding systems, and robotic tube-to-tubesheet welding workstations.

The equipment mainly adopts the tungsten inert gas welding process and can select autogenous welding without filler wire, cold wire filler welding, hot wire filler welding, and pulsed welding according to tube materials, wall thicknesses, and joint configurations. Through programmable control, it regulates welding current, rotation speed, wire feeding speed, shielding gas flow rate, arc length, torch oscillation, and segmented welding parameters. Mainstream equipment typically supports tube diameters of approximately 9.5 to 60 mm, while some specialized models can accommodate smaller or larger diameters, deep-hole structures, recessed tube ends, extended tube ends,

back-side welding, and double tubesheet configurations. The core functions of these machines are to improve weld consistency, penetration stability, sealing performance, and production efficiency for repetitive tube welding operations, reduce variations caused by manual operation, and enable storage, traceability, and analysis of welding procedures and quality data.

The products are mainly applied in the manufacturing of shell-and-tube heat exchangers, condensers, evaporators, boilers, steam generators, reactors, and pressure vessels. They serve industries including oil refining, petrochemicals, chemicals, power generation, nuclear power, pharmaceuticals, food processing, marine engineering, and industrial gas equipment. In 2025, the average gross margin of the global tube-to-tubesheet orbital welding machine industry was approximately 38%–45%.

The upstream segment of the orbital tube to tubesheet welder industry mainly includes inverter welding power sources, precision motors, reduction mechanisms, rotating electrical transmission components, tungsten electrodes, wire feeding devices, controllers, industrial computers, sensors, water cooling units, gas control components and precision machined parts. Midstream companies undertake welding head design, program control development, complete equipment manufacturing, welding procedure database construction, system integration and application validation. Downstream customers include manufacturers of heat exchangers, boilers, condensers, pressure vessels and energy equipment. The value of the industry is not limited to performing the welding action itself. It is reflected in quality consistency, production cycle control, welding data traceability and the ability to reduce dependence on highly skilled welders when large numbers of repetitive joints must be completed. As downstream users raise their requirements for quality management and digital production, the integration of welding power sources, welding heads, positioning mechanisms and quality recording software continues to increase.

The global supply structure is characterized by European and North American companies controlling advanced technologies and global distribution channels, Chinese companies expanding the supply of standardized equipment and customized systems, and Japanese and Indian companies serving regional markets. European and North American manufacturers have accumulated deeper capabilities in internal bore welding, backside welding, double tubesheet welding, high duty cycle operation and nuclear grade applications. They have also consolidated orbital welding brands, distribution channels and service networks through corporate acquisitions. Supported by domestic supply chains for welding power sources, precision machining, automation control and heat exchanger equipment, Chinese manufacturers have expanded from basic

suspended machines toward gantry positioning, vision guided tube location, coordinated multi machine operation and robotic welding. Regional supply chains are shifting from equipment exports alone toward localized service, process support and spare parts supply, although highly reliable control systems and experience in complex applications remain important competitive barriers for international brands.

Oil refining, petrochemical and chemical equipment remain the principal application fields. Purchasing demand is closely related to large refining and chemical projects, fine chemical investments, heat exchanger production line expenditure and replacement of installed equipment. Electric power and nuclear power applications impose stricter requirements for weld quality, process stability and data recording. Although the number of projects is comparatively limited, these sectors support demand for highly configured equipment, specialized welding heads and automated workstations. Pharmaceuticals, food processing, industrial gases, offshore engineering and other process industries form more fragmented incremental markets. Downstream investment does not translate proportionally into welder sales because one machine can complete a large number of joints. Industry growth therefore depends more heavily on new production lines, equipment replacement, process upgrading and increases in the value of automation configurations.

The policy and regulatory environment is generally favorable to the development of high quality welding equipment. Pressure vessels, boilers, nuclear equipment and pressurized heat exchangers are governed by strict manufacturing codes, quality certification requirements and welding process controls, encouraging end users to adopt repeatable, verifiable and traceable automatic welding processes. Global nuclear construction, energy security investment and the expansion of process industry capacity in Asia provide stable demand for advanced tubesheet welding equipment. At the same time, fluctuations in conventional refining capital expenditure and the long service life of welding equipment constrain rapid short term expansion. Future products will increasingly incorporate digital parameter management, automatic vision positioning, remote diagnostics, coordinated multi head operation, robotic workstations and closed loop welding quality control. The industry outlook is therefore one of stable upgrading within a mature specialized equipment market rather than rapid expansion driven by a single downstream sector.

Report Scope

This report studies the global Orbital Tube-to-Tubesheet Welders production, demand,

key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Orbital Tube-to-Tubesheet Welders 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 Orbital Tube-to-Tubesheet Welders that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Orbital Tube-to-Tubesheet Welders total production and demand, 2021-2032, (Units)

Global Orbital Tube-to-Tubesheet Welders total production value, 2021-2032, (USD Million)

Global Orbital Tube-to-Tubesheet Welders production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Orbital Tube-to-Tubesheet Welders consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Orbital Tube-to-Tubesheet Welders domestic production, consumption, key domestic manufacturers and share

Global Orbital Tube-to-Tubesheet Welders production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Orbital Tube-to-Tubesheet Welders production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Orbital Tube-to-Tubesheet Welders production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Orbital Tube-to-Tubesheet Welders 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 Polysoude S.A.S., ESAB Corporation, Liburdi Group, Specialized Fabrication Equipment Group, Illinois Tool Works Inc., Kunshan Huaheng Welding Co., Ltd., Orbitec GmbH, Orbitalservice GmbH, Shanghai Xindun Automation Technology Co., Ltd., Shanghai MechWelding Intelligent Technology Co., Ltd., 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 Orbital Tube-to-Tubesheet Welders market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K 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 Orbital Tube-to-Tubesheet Welders Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Orbital Tube-to-Tubesheet Welders Market, Segmentation by Type:

Portable Orbital Tube-to-Tubesheet Welder

Suspended Orbital Tube-to-Tubesheet Welder

Gantry Welding System

Robotic Tube-to-Tubesheet Welding Workstation

Other

Global Orbital Tube-to-Tubesheet Welders Market, Segmentation by Welding Process:

Autogenous TIG (No Filler)

Cold Wire TIG

Hot Wire TIG

Pulsed TIG

Other

Global Orbital Tube-to-Tubesheet Welders Market, Segmentation by Joint Configuration:

Flush Tube Joints

Projecting Tube Joints

Recessed Tube Joints

Internal Bore and Backside Joints

Double Tubesheet Joints

Others

Global Orbital Tube-to-Tubesheet Welders Market, Segmentation by Applicable Tube Diameter:

Small Tube Diameter 9.5–20 mm

Medium Tube Diameter >20–32 mm

Large Tube Diameter >32–45 mm

Extra Large Tube Diameter >45–60 mm

Others

Global Orbital Tube-to-Tubesheet Welders Market, Segmentation by Application:

Petrochemical

Power Generation

Industrial Gas

Pharmaceutical

Offshore Engineering

Other

Companies Profiled:

Polysoude S.A.S.

ESAB Corporation

Liburdi Group

Specialized Fabrication Equipment Group

Illinois Tool Works Inc.

Kunshan Huaheng Welding Co., Ltd.

Orbitec GmbH

Orbitalservice GmbH

Shanghai Xindun Automation Technology Co., Ltd.

Shanghai MechWelding Intelligent Technology Co., Ltd.

Shandong Aotai Electric Co., Ltd.

Zhengzhou Kehui Technology Co., Ltd.

NODHA Industrial Technology Wuxi Co., Ltd.

L&W Inc.

Universal Orbital Systems Pvt. Ltd.

Shanghai Grandfly Industrial Co., Ltd.

Key Questions Answered:

1. How big is the global Orbital Tube-to-Tubesheet Welders market?
2. What is the demand of the global Orbital Tube-to-Tubesheet Welders market?
3. What is the year over year growth of the global Orbital Tube-to-Tubesheet Welders market?
4. What is the production and production value of the global Orbital Tube-to-Tubesheet Welders market?
5. Who are the key producers in the global Orbital Tube-to-Tubesheet Welders market?
6. What are the growth factors driving the market demand?

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