

Global Orbital Tube-to-Tubesheet Welders Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G0516EE1097DEN.html>

Date: September 2026

Pages: 144

Price: US\$ 3,480.00 (Single User License)

ID: G0516EE1097DEN

Abstracts

According to our (Global Info Research) latest study, the global Orbital Tube-to-Tubesheet Welders market size was valued at US\$ 89.79 million in 2025 and is forecast to a readjusted size of US\$ 136 million by 2032 with a CAGR of 6.0% during review period.

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 is a detailed and comprehensive analysis for global Orbital Tube-to-Tubesheet Welders market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Orbital Tube-to-Tubesheet Welders market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Orbital Tube-to-Tubesheet Welders market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Orbital Tube-to-Tubesheet Welders market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Orbital Tube-to-Tubesheet Welders market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Orbital Tube-to-Tubesheet Welders
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Orbital Tube-to-Tubesheet Welders market

based on the following parameters - company overview, sales quantity, revenue, 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.

Orbital Tube-to-Tubesheet Welders market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market Segmentation

Market segment by Type

- Portable Orbital Tube-to-Tubesheet Welder
- Suspended Orbital Tube-to-Tubesheet Welder
- Gantry Welding System
- Robotic Tube-to-Tubesheet Welding Workstation
- Other

Market segment by Welding Process

- Autogenous TIG (No Filler)
- Cold Wire TIG

Hot Wire TIG

Pulsed TIG

Other

Market segment by Joint Configuration

Flush Tube Joints

Projecting Tube Joints

Recessed Tube Joints

Internal Bore and Backside Joints

Double Tubesheet Joints

Others

Market segment 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

Market segment by Application

Petrochemical

Power Generation

Industrial Gas

Pharmaceutical

Offshore Engineering

Other

Major players covered

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.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Orbital Tube-to-Tubesheet Welders product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Orbital Tube-to-Tubesheet Welders, with price, sales quantity, revenue, and global market share of Orbital Tube-to-Tubesheet Welders from 2021 to 2026.

Chapter 3, the Orbital Tube-to-Tubesheet Welders competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Orbital Tube-to-Tubesheet Welders breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions,

from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Orbital Tube-to-Tubesheet Welders market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Orbital Tube-to-Tubesheet Welders.

Chapter 14 and 15, to describe Orbital Tube-to-Tubesheet Welders sales channel, distributors, customers, research findings and conclusion.

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