

Global Pipe Jacking Machines Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pipe Jacking Machines market size is expected to reach \$ 999 million by 2032, rising at a market growth of 7.2% CAGR during the forecast period (2026-2032).

Pipe Jacking Machines are trenchless construction systems used to install underground pipelines by hydraulically pushing prefabricated pipes through soil while excavating at the front face. Operating between launch and reception shafts, these machines minimize surface disruption and can be equipped with slurry balance, earth pressure balance, or open-face systems to adapt to different ground conditions, making them widely applied in municipal, water, and utility infrastructure projects.

In 2025, global Pipe Jacking Machines production reached approximately 1,938 units, with an average price of around USD 305,000 per unit, indicating a low-volume, high-value equipment market. Demand is primarily driven by urban infrastructure development, pipeline replacement, and increasing adoption of trenchless technology. The market remains project-driven, with significant fluctuations depending on large-scale municipal investments and regional construction cycles.

From a capacity perspective, the global industry maintains an estimated production capacity of around 2,500 units annually, suggesting a moderate capacity buffer above actual output. Manufacturing is concentrated among a limited number of specialized OEMs in Europe, Japan, and China, with Asia-Pacific representing the largest demand region. The industry operates largely on a build-to-order model, limiting inventory and requiring strong engineering and project management capabilities.

In terms of profitability, Pipe Jacking Machines typically achieve gross margins in the range of 25%-40%, supported by high technical barriers, customization, and relatively

limited competition in advanced segments. However, margins are influenced by raw material costs, project complexity, and order timing. High-end machines designed for complex geology or large diameters generally command higher margins due to their engineering intensity and performance requirements.

Looking ahead, the market is expected to grow steadily, supported by increasing global infrastructure investment and environmental regulations favoring trenchless construction. Key trends include the adoption of automation and intelligent guidance systems, expansion toward larger-diameter and longer-distance tunneling, and increasing digitalization of construction processes. As urban density rises and surface disruption becomes less acceptable, Pipe Jacking Machines are expected to play an increasingly critical role in underground construction solutions.

This report studies the global Pipe Jacking Machines production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pipe Jacking Machines 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 Pipe Jacking Machines that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pipe Jacking Machines total production and demand, 2021-2032, (Units)

Global Pipe Jacking Machines total production value, 2021-2032, (USD Million)

Global Pipe Jacking Machines production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Pipe Jacking Machines consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Pipe Jacking Machines domestic production, consumption, key domestic manufacturers and share

Global Pipe Jacking Machines production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Pipe Jacking Machines production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Pipe Jacking Machines production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Pipe Jacking Machines 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 Herrenknecht AG, Anhui Tangxing Equipment Technology Co., Ltd., RASA Industries, Ltd., Zhenjiang Hongyu Electromechanical Equipment Co., Ltd., Yangzhou Guangxin Heavy Equipment Co., Ltd., Yangzhou Dilong Machinery Co., Ltd., Jiangsu Xuanxuan Heavy Industry Machinery Co., Ltd., Anhui Zhuoke Intelligent Equipment Co., Ltd., Realtop Heavy Industry Co., Ltd., Akkerman Inc., 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 Pipe Jacking Machines market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (USD/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 Pipe Jacking Machines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pipe Jacking Machines Market, Segmentation by Type:

Small Diameter

Medium Diameter

Large Diameter

Global Pipe Jacking Machines Market, Segmentation by Geological Adaptability:

Soft Soil Machine

Mixed Ground Machine

Rock Ground Machine

Global Pipe Jacking Machines Market, Segmentation by Guidance Type:

Microtunneling

Non-guided Pipe Jacking Machine

Global Pipe Jacking Machines Market, Segmentation by Application:

Railway and Highway

Water Treatment Industry

Power Industry

Communications Industry

Mining Industry

Construction Industry

Other

Companies Profiled:

Herrenknecht AG

Anhui Tangxing Equipment Technology Co., Ltd.

RASA Industries, Ltd.

Zhenjiang Hongyu Electromechanical Equipment Co., Ltd.

Yangzhou Guangxin Heavy Equipment Co., Ltd.

Yangzhou Dilong Machinery Co., Ltd.

Jiangsu Xuanxuan Heavy Industry Machinery Co., Ltd.

Anhui Zhuoke Intelligent Equipment Co., Ltd.

Realtop Heavy Industry Co., Ltd.

Akkerman Inc.

Yangzhou Sipusen Machinery Manufacturing

mts Microtunneling Systems GmbH

Key Questions Answered:

1. How big is the global Pipe Jacking Machines market?
2. What is the demand of the global Pipe Jacking Machines market?
3. What is the year over year growth of the global Pipe Jacking Machines market?
4. What is the production and production value of the global Pipe Jacking Machines market?

5. Who are the key producers in the global Pipe Jacking Machines market?
6. What are the growth factors driving the market demand?

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