

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

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Abstracts

The global Pipe Ramming 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 the ground while simultaneously excavating soil at the front face. Typically operating from a launch shaft to a reception shaft, these machines enable pipeline installation with minimal surface disruption. They can be equipped with different excavation technologies, such as slurry balance or earth pressure balance systems, allowing them to operate in a wide range of ground conditions including soft soil, mixed ground, and rock.

In 2025, global production reached approximately 1,938 units, reflecting a low-volume, high-value capital equipment market. The industry is highly project-driven, with each machine typically customized based on pipe diameter, geology, and project requirements, making standardization relatively limited.

Global production capacity is relatively constrained, typically estimated at 2,500 units per year, indicating a moderate supply buffer over actual production. Manufacturing is concentrated in Europe, Japan, and China, with Asia-Pacific being the largest demand region due to rapid urban infrastructure expansion.

In terms of profitability, Pipe Jacking Machines generally achieve gross margins in the range of 25%-40%, supported by high technical barriers, customization, and limited competition in high-end segments. However, margins are sensitive to raw material costs, project cycles, and order timing, as most equipment is produced on a build-to-order basis rather than mass production. High-end manufacturers, particularly those with strong capabilities in complex geology and large-diameter systems, typically

achieve higher margins.

The industry chain includes upstream suppliers of cutterheads, hydraulic systems, and control systems; midstream OEM manufacturers; and downstream contractors and municipal infrastructure clients. Market dynamics are strongly influenced by government investment in water, sewage, and utility infrastructure, as well as replacement of aging pipelines. Trenchless technology adoption is accelerating globally due to its ability to reduce surface disruption and environmental impact.

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

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Pipe Ramming 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 Ramming 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 Ramming Machines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pipe Ramming Machines Market, Segmentation by Type:

Earth Pressure Balancing Pipe Ramming Machine

Mud-Water Balancing Pipe Ramming Machine

Others

Global Pipe Ramming Machines Market, Segmentation by Geological Adaptability:

Soft Soil Machine

Mixed Ground Machine

Rock Ground Machine

Global Pipe Ramming Machines Market, Segmentation by Pipe Diameter:

Small Diameter

Medium Diameter

Large Diameter

Global Pipe Ramming Machines Market, Segmentation by Application:

Tap Water Industry

Oil and Gas Industry

Traffic Tunnel

Others

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 Ramming Machines market?
2. What is the demand of the global Pipe Ramming Machines market?
3. What is the year over year growth of the global Pipe Ramming Machines market?
4. What is the production and production value of the global Pipe Ramming Machines market?
5. Who are the key producers in the global Pipe Ramming Machines market?
6. What are the growth factors driving the market demand?

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