

Global Shield Tunnel Boring Machine Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G663AD2A1B30EN.html>

Date: May 2026

Pages: 120

Price: US\$ 4,480.00 (Single User License)

ID: G663AD2A1B30EN

Abstracts

The global Shield Tunnel Boring Machine market size is expected to reach \$ 7089 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

A Shield Tunnel Boring Machine is a large integrated underground construction system that excavates soil or mixed ground with a rotating cutterhead while using a steel shield to support the tunnel face and surrounding ground, and simultaneously installs segmental lining behind the machine. It is widely used in metro, railway, road, utility and underwater tunnel projects because it offers high safety, low surface disturbance, and strong adaptability in urban soft-ground and water-bearing geological conditions. In 2025, Global Shield Tunnel Boring Machine sales is estimated at 320 units, with an average ex-works price of 16,500 K US\$/Unit.

The primary driver of the shield tunnel boring machine market is the continued global investment in underground infrastructure, especially urban metro expansion, utility tunnelling, cross-river crossings and congestion-relief transport projects. Shield TBMs remain strategically important because they are the most efficient and lowest-disruption solution for long tunnel sections in soft ground, mixed ground and high-water-pressure conditions, and the push toward larger diameters, intelligent control, lower labor intensity and domestic substitution of key parts is further expanding both replacement demand and the technical value of each machine. In parallel, China's large installed base, export growth and increasing localization of critical components are strengthening supply capability and supporting broader market adoption.

This report studies the global Shield Tunnel Boring Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Shield Tunnel Boring 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 Shield Tunnel Boring Machine that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Shield Tunnel Boring Machine total production and demand, 2021-2032, (Units)
Global Shield Tunnel Boring Machine total production value, 2021-2032, (USD Million)
Global Shield Tunnel Boring Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Shield Tunnel Boring Machine consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Shield Tunnel Boring Machine domestic production, consumption, key domestic manufacturers and share
Global Shield Tunnel Boring Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Shield Tunnel Boring Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Shield Tunnel Boring Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Shield Tunnel Boring 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 Herrenknecht, Robbins, Komatsu, Mitsubishi, Hitachi Zosen, China Railway Engineering Equipment Group, China Railway Construction Heavy Industry, China Communications Construction Tianhe Mechanical Equipment, Shanghai Tunnel Engineering Co., Ltd., Northern Heavy Industries Group, 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 Shield Tunnel Boring Machine 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 Shield Tunnel Boring Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Shield Tunnel Boring Machine Market, Segmentation by Type:

Single Shield TBM

Double Shield TBM

Others

Global Shield Tunnel Boring Machine Market, Segmentation by Diameter:

Small Diameter

Medium Diameter

Large Diameter

Extra-large Diameter

Global Shield Tunnel Boring Machine Market, Segmentation by Control Configuration:

Conventional Hydraulic Control

Electro-hydraulic Integrated Control

Global Shield Tunnel Boring Machine Market, Segmentation by Application:

Transportation

Water Conservancy

Others

Companies Profiled:

Herrenknecht

Robbins

Komatsu

Mitsubishi

Hitachi Zosen

China Railway Engineering Equipment Group

China Railway Construction Heavy Industry

China Communications Construction Tianhe Mechanical Equipment

Shanghai Tunnel Engineering Co., Ltd.

Northern Heavy Industries Group

Liaoning Censcience Industry

Key Questions Answered:

1. How big is the global Shield Tunnel Boring Machine market?
2. What is the demand of the global Shield Tunnel Boring Machine market?
3. What is the year over year growth of the global Shield Tunnel Boring Machine market?
4. What is the production and production value of the global Shield Tunnel Boring Machine market?
5. Who are the key producers in the global Shield Tunnel Boring Machine market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Shield Tunnel Boring Machine Introduction
- 1.2 World Shield Tunnel Boring Machine Supply & Forecast
 - 1.2.1 World Shield Tunnel Boring Machine Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Shield Tunnel Boring Machine Production (2021-2032)
 - 1.2.3 World Shield Tunnel Boring Machine Pricing Trends (2021-2032)
- 1.3 World Shield Tunnel Boring Machine Production by Region (Based on Production Site)
 - 1.3.1 World Shield Tunnel Boring Machine Production Value by Region (2021-2032)
 - 1.3.2 World Shield Tunnel Boring Machine Production by Region (2021-2032)
 - 1.3.3 World Shield Tunnel Boring Machine Average Price by Region (2021-2032)
 - 1.3.4 North America Shield Tunnel Boring Machine Production (2021-2032)
 - 1.3.5 Europe Shield Tunnel Boring Machine Production (2021-2032)
 - 1.3.6 China Shield Tunnel Boring Machine Production (2021-2032)
 - 1.3.7 Japan Shield Tunnel Boring Machine Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Shield Tunnel Boring Machine Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Shield Tunnel Boring Machine Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Shield Tunnel Boring Machine Demand (2021-2032)
- 2.2 World Shield Tunnel Boring Machine Consumption by Region
 - 2.2.1 World Shield Tunnel Boring Machine Consumption by Region (2021-2026)
 - 2.2.2 World Shield Tunnel Boring Machine Consumption Forecast by Region (2027-2032)
- 2.3 United States Shield Tunnel Boring Machine Consumption (2021-2032)
- 2.4 China Shield Tunnel Boring Machine Consumption (2021-2032)
- 2.5 Europe Shield Tunnel Boring Machine Consumption (2021-2032)
- 2.6 Japan Shield Tunnel Boring Machine Consumption (2021-2032)
- 2.7 South Korea Shield Tunnel Boring Machine Consumption (2021-2032)
- 2.8 ASEAN Shield Tunnel Boring Machine Consumption (2021-2032)
- 2.9 India Shield Tunnel Boring Machine Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Shield Tunnel Boring Machine Production Value by Manufacturer (2021-2026)
- 3.2 World Shield Tunnel Boring Machine Production by Manufacturer (2021-2026)
- 3.3 World Shield Tunnel Boring Machine Average Price by Manufacturer (2021-2026)
- 3.4 Shield Tunnel Boring Machine Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Shield Tunnel Boring Machine Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Shield Tunnel Boring Machine in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Shield Tunnel Boring Machine in 2025
- 3.6 Shield Tunnel Boring Machine Market: Overall Company Footprint Analysis
 - 3.6.1 Shield Tunnel Boring Machine Market: Region Footprint
 - 3.6.2 Shield Tunnel Boring Machine Market: Company Product Type Footprint
 - 3.6.3 Shield Tunnel Boring Machine Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Shield Tunnel Boring Machine Production Value Comparison
 - 4.1.1 United States VS China: Shield Tunnel Boring Machine Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Shield Tunnel Boring Machine Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Shield Tunnel Boring Machine Production Comparison
 - 4.2.1 United States VS China: Shield Tunnel Boring Machine Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Shield Tunnel Boring Machine Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Shield Tunnel Boring Machine Consumption Comparison
 - 4.3.1 United States VS China: Shield Tunnel Boring Machine Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Shield Tunnel Boring Machine Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Shield Tunnel Boring Machine Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Shield Tunnel Boring Machine Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Shield Tunnel Boring Machine Production Value (2021-2026)

4.4.3 United States Based Manufacturers Shield Tunnel Boring Machine Production (2021-2026)

4.5 China Based Shield Tunnel Boring Machine Manufacturers and Market Share

4.5.1 China Based Shield Tunnel Boring Machine Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Shield Tunnel Boring Machine Production Value (2021-2026)

4.5.3 China Based Manufacturers Shield Tunnel Boring Machine Production (2021-2026)

4.6 Rest of World Based Shield Tunnel Boring Machine Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Shield Tunnel Boring Machine Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Shield Tunnel Boring Machine Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Shield Tunnel Boring Machine Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Shield Tunnel Boring Machine Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Single Shield TBM

5.2.2 Double Shield TBM

5.2.3 Others

5.3 Market Segment by Type

5.3.1 World Shield Tunnel Boring Machine Production by Type (2021-2032)

5.3.2 World Shield Tunnel Boring Machine Production Value by Type (2021-2032)

5.3.3 World Shield Tunnel Boring Machine Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY DIAMETER

6.1 World Shield Tunnel Boring Machine Market Size Overview by Diameter: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Diameter

6.2.1 Small Diameter

6.2.2 Medium Diameter

6.2.3 Large Diameter

6.2.4 Extra-large Diameter

6.3 Market Segment by Diameter

6.3.1 World Shield Tunnel Boring Machine Production by Diameter (2021-2032)

6.3.2 World Shield Tunnel Boring Machine Production Value by Diameter (2021-2032)

6.3.3 World Shield Tunnel Boring Machine Average Price by Diameter (2021-2032)

7 MARKET ANALYSIS BY CONTROL CONFIGURATION

7.1 World Shield Tunnel Boring Machine Market Size Overview by Control Configuration: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Control Configuration

7.2.1 Conventional Hydraulic Control

7.2.2 Electro-hydraulic Integrated Control

7.3 Market Segment by Control Configuration

7.3.1 World Shield Tunnel Boring Machine Production by Control Configuration (2021-2032)

7.3.2 World Shield Tunnel Boring Machine Production Value by Control Configuration (2021-2032)

7.3.3 World Shield Tunnel Boring Machine Average Price by Control Configuration (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Shield Tunnel Boring Machine Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Transportation

8.2.2 Water Conservancy

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World Shield Tunnel Boring Machine Production by Application (2021-2032)

8.3.2 World Shield Tunnel Boring Machine Production Value by Application (2021-2032)

8.3.3 World Shield Tunnel Boring Machine Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Herrenknecht

9.1.1 Herrenknecht Details

9.1.2 Herrenknecht Major Business

9.1.3 Herrenknecht Shield Tunnel Boring Machine Product and Services

9.1.4 Herrenknecht Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Herrenknecht Recent Developments/Updates

9.1.6 Herrenknecht Competitive Strengths & Weaknesses

9.2 Robbins

9.2.1 Robbins Details

9.2.2 Robbins Major Business

9.2.3 Robbins Shield Tunnel Boring Machine Product and Services

9.2.4 Robbins Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.2.5 Robbins Recent Developments/Updates

9.2.6 Robbins Competitive Strengths & Weaknesses

9.3 Komatsu

9.3.1 Komatsu Details

9.3.2 Komatsu Major Business

9.3.3 Komatsu Shield Tunnel Boring Machine Product and Services

9.3.4 Komatsu Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.3.5 Komatsu Recent Developments/Updates

9.3.6 Komatsu Competitive Strengths & Weaknesses

9.4 Mitsubishi

9.4.1 Mitsubishi Details

9.4.2 Mitsubishi Major Business

9.4.3 Mitsubishi Shield Tunnel Boring Machine Product and Services

9.4.4 Mitsubishi Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.4.5 Mitsubishi Recent Developments/Updates

9.4.6 Mitsubishi Competitive Strengths & Weaknesses

9.5 Hitachi Zosen

9.5.1 Hitachi Zosen Details

9.5.2 Hitachi Zosen Major Business

- 9.5.3 Hitachi Zosen Shield Tunnel Boring Machine Product and Services
- 9.5.4 Hitachi Zosen Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.5.5 Hitachi Zosen Recent Developments/Updates
- 9.5.6 Hitachi Zosen Competitive Strengths & Weaknesses
- 9.6 China Railway Engineering Equipment Group
 - 9.6.1 China Railway Engineering Equipment Group Details
 - 9.6.2 China Railway Engineering Equipment Group Major Business
 - 9.6.3 China Railway Engineering Equipment Group Shield Tunnel Boring Machine Product and Services
 - 9.6.4 China Railway Engineering Equipment Group Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 China Railway Engineering Equipment Group Recent Developments/Updates
 - 9.6.6 China Railway Engineering Equipment Group Competitive Strengths & Weaknesses
- 9.7 China Railway Construction Heavy Industry
 - 9.7.1 China Railway Construction Heavy Industry Details
 - 9.7.2 China Railway Construction Heavy Industry Major Business
 - 9.7.3 China Railway Construction Heavy Industry Shield Tunnel Boring Machine Product and Services
 - 9.7.4 China Railway Construction Heavy Industry Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.7.5 China Railway Construction Heavy Industry Recent Developments/Updates
 - 9.7.6 China Railway Construction Heavy Industry Competitive Strengths & Weaknesses
- 9.8 China Communications Construction Tianhe Mechanical Equipment
 - 9.8.1 China Communications Construction Tianhe Mechanical Equipment Details
 - 9.8.2 China Communications Construction Tianhe Mechanical Equipment Major Business
 - 9.8.3 China Communications Construction Tianhe Mechanical Equipment Shield Tunnel Boring Machine Product and Services
 - 9.8.4 China Communications Construction Tianhe Mechanical Equipment Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.8.5 China Communications Construction Tianhe Mechanical Equipment Recent Developments/Updates
 - 9.8.6 China Communications Construction Tianhe Mechanical Equipment Competitive Strengths & Weaknesses
- 9.9 Shanghai Tunnel Engineering Co., Ltd.

- 9.9.1 Shanghai Tunnel Engineering Co., Ltd. Details
- 9.9.2 Shanghai Tunnel Engineering Co., Ltd. Major Business
- 9.9.3 Shanghai Tunnel Engineering Co., Ltd. Shield Tunnel Boring Machine Product and Services
- 9.9.4 Shanghai Tunnel Engineering Co., Ltd. Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.9.5 Shanghai Tunnel Engineering Co., Ltd. Recent Developments/Updates
- 9.9.6 Shanghai Tunnel Engineering Co., Ltd. Competitive Strengths & Weaknesses
- 9.10 Northern Heavy Industries Group
 - 9.10.1 Northern Heavy Industries Group Details
 - 9.10.2 Northern Heavy Industries Group Major Business
 - 9.10.3 Northern Heavy Industries Group Shield Tunnel Boring Machine Product and Services
 - 9.10.4 Northern Heavy Industries Group Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.10.5 Northern Heavy Industries Group Recent Developments/Updates
 - 9.10.6 Northern Heavy Industries Group Competitive Strengths & Weaknesses
- 9.11 Liaoning Censcience Industry
 - 9.11.1 Liaoning Censcience Industry Details
 - 9.11.2 Liaoning Censcience Industry Major Business
 - 9.11.3 Liaoning Censcience Industry Shield Tunnel Boring Machine Product and Services
 - 9.11.4 Liaoning Censcience Industry Shield Tunnel Boring Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.11.5 Liaoning Censcience Industry Recent Developments/Updates
 - 9.11.6 Liaoning Censcience Industry Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

- 10.1 Shield Tunnel Boring Machine Industry Chain
- 10.2 Shield Tunnel Boring Machine Upstream Analysis
 - 10.2.1 Shield Tunnel Boring Machine Core Raw Materials
 - 10.2.2 Main Manufacturers of Shield Tunnel Boring Machine Core Raw Materials
- 10.3 Midstream Analysis
- 10.4 Downstream Analysis
- 10.5 Shield Tunnel Boring Machine Production Mode
- 10.6 Shield Tunnel Boring Machine Procurement Model
- 10.7 Shield Tunnel Boring Machine Industry Sales Model and Sales Channels
 - 10.7.1 Shield Tunnel Boring Machine Sales Model

10.7.2 Shield Tunnel Boring Machine Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Shield Tunnel Boring Machine Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Shield Tunnel Boring Machine Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Shield Tunnel Boring Machine Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Shield Tunnel Boring Machine Production Value Market Share by Region (2021-2026)
- Table 5. World Shield Tunnel Boring Machine Production Value Market Share by Region (2027-2032)
- Table 6. World Shield Tunnel Boring Machine Production by Region (2021-2026) & (Units)
- Table 7. World Shield Tunnel Boring Machine Production by Region (2027-2032) & (Units)
- Table 8. World Shield Tunnel Boring Machine Production Market Share by Region (2021-2026)
- Table 9. World Shield Tunnel Boring Machine Production Market Share by Region (2027-2032)
- Table 10. World Shield Tunnel Boring Machine Average Price by Region (2021-2026) & (K US\$/Unit)
- Table 11. World Shield Tunnel Boring Machine Average Price by Region (2027-2032) & (K US\$/Unit)
- Table 12. Shield Tunnel Boring Machine Major Market Trends
- Table 13. World Shield Tunnel Boring Machine Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)
- Table 14. World Shield Tunnel Boring Machine Consumption by Region (2021-2026) & (Units)
- Table 15. World Shield Tunnel Boring Machine Consumption Forecast by Region (2027-2032) & (Units)
- Table 16. World Shield Tunnel Boring Machine Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Shield Tunnel Boring Machine Producers in 2025
- Table 18. World Shield Tunnel Boring Machine Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Shield Tunnel Boring Machine Producers in 2025

Table 20. World Shield Tunnel Boring Machine Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Shield Tunnel Boring Machine Company Evaluation Quadrant

Table 22. World Shield Tunnel Boring Machine Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Shield Tunnel Boring Machine Production Site of Key Manufacturer

Table 24. Shield Tunnel Boring Machine Market: Company Product Type Footprint

Table 25. Shield Tunnel Boring Machine Market: Company Product Application Footprint

Table 26. Shield Tunnel Boring Machine Competitive Factors

Table 27. Shield Tunnel Boring Machine New Entrant and Capacity Expansion Plans

Table 28. Shield Tunnel Boring Machine Mergers & Acquisitions Activity

Table 29. United States VS China Shield Tunnel Boring Machine Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Shield Tunnel Boring Machine Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Shield Tunnel Boring Machine Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Shield Tunnel Boring Machine Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Shield Tunnel Boring Machine Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Shield Tunnel Boring Machine Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Shield Tunnel Boring Machine Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Shield Tunnel Boring Machine Production Market Share (2021-2026)

Table 37. China Based Shield Tunnel Boring Machine Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Shield Tunnel Boring Machine Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Shield Tunnel Boring Machine Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Shield Tunnel Boring Machine Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Shield Tunnel Boring Machine Production Market Share (2021-2026)

Table 42. Rest of World Based Shield Tunnel Boring Machine Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Shield Tunnel Boring Machine Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Shield Tunnel Boring Machine Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Shield Tunnel Boring Machine Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Shield Tunnel Boring Machine Production Market Share (2021-2026)

Table 47. World Shield Tunnel Boring Machine Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Shield Tunnel Boring Machine Production by Type (2021-2026) & (Units)

Table 49. World Shield Tunnel Boring Machine Production by Type (2027-2032) & (Units)

Table 50. World Shield Tunnel Boring Machine Production Value by Type (2021-2026) & (USD Million)

Table 51. World Shield Tunnel Boring Machine Production Value by Type (2027-2032) & (USD Million)

Table 52. World Shield Tunnel Boring Machine Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Shield Tunnel Boring Machine Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Shield Tunnel Boring Machine Production Value by Diameter, (USD Million), 2021 & 2025 & 2032

Table 55. World Shield Tunnel Boring Machine Production by Diameter (2021-2026) & (Units)

Table 56. World Shield Tunnel Boring Machine Production by Diameter (2027-2032) & (Units)

Table 57. World Shield Tunnel Boring Machine Production Value by Diameter (2021-2026) & (USD Million)

Table 58. World Shield Tunnel Boring Machine Production Value by Diameter (2027-2032) & (USD Million)

Table 59. World Shield Tunnel Boring Machine Average Price by Diameter (2021-2026) & (K US\$/Unit)

Table 60. World Shield Tunnel Boring Machine Average Price by Diameter (2027-2032)

& (K US\$/Unit)

Table 61. World Shield Tunnel Boring Machine Production Value by Control Configuration, (USD Million), 2021 & 2025 & 2032

Table 62. World Shield Tunnel Boring Machine Production by Control Configuration (2021-2026) & (Units)

Table 63. World Shield Tunnel Boring Machine Production by Control Configuration (2027-2032) & (Units)

Table 64. World Shield Tunnel Boring Machine Production Value by Control Configuration (2021-2026) & (USD Million)

Table 65. World Shield Tunnel Boring Machine Production Value by Control Configuration (2027-2032) & (USD Million)

Table 66. World Shield Tunnel Boring Machine Average Price by Control Configuration (2021-2026) & (K US\$/Unit)

Table 67. World Shield Tunnel Boring Machine Average Price by Control Configuration (2027-2032) & (K US\$/Unit)

Table 68. World Shield Tunnel Boring Machine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Shield Tunnel Boring Machine Production by Application (2021-2026) & (Units)

Table 70. World Shield Tunnel Boring Machine Production by Application (2027-2032) & (Units)

Table 71. World Shield Tunnel Boring Machine Production Value by Application (2021-2026) & (USD Million)

Table 72. World Shield Tunnel Boring Machine Production Value by Application (2027-2032) & (USD Million)

Table 73. World Shield Tunnel Boring Machine Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Shield Tunnel Boring Machine Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Herrenknecht Basic Information, Manufacturing Base and Competitors

Table 76. Herrenknecht Major Business

Table 77. Herrenknecht Shield Tunnel Boring Machine Product and Services

Table 78. Herrenknecht Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Herrenknecht Recent Developments/Updates

Table 80. Herrenknecht Competitive Strengths & Weaknesses

Table 81. Robbins Basic Information, Manufacturing Base and Competitors

Table 82. Robbins Major Business

- Table 83. Robbins Shield Tunnel Boring Machine Product and Services
- Table 84. Robbins Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 85. Robbins Recent Developments/Updates
- Table 86. Robbins Competitive Strengths & Weaknesses
- Table 87. Komatsu Basic Information, Manufacturing Base and Competitors
- Table 88. Komatsu Major Business
- Table 89. Komatsu Shield Tunnel Boring Machine Product and Services
- Table 90. Komatsu Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 91. Komatsu Recent Developments/Updates
- Table 92. Komatsu Competitive Strengths & Weaknesses
- Table 93. Mitsubishi Basic Information, Manufacturing Base and Competitors
- Table 94. Mitsubishi Major Business
- Table 95. Mitsubishi Shield Tunnel Boring Machine Product and Services
- Table 96. Mitsubishi Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 97. Mitsubishi Recent Developments/Updates
- Table 98. Mitsubishi Competitive Strengths & Weaknesses
- Table 99. Hitachi Zosen Basic Information, Manufacturing Base and Competitors
- Table 100. Hitachi Zosen Major Business
- Table 101. Hitachi Zosen Shield Tunnel Boring Machine Product and Services
- Table 102. Hitachi Zosen Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 103. Hitachi Zosen Recent Developments/Updates
- Table 104. Hitachi Zosen Competitive Strengths & Weaknesses
- Table 105. China Railway Engineering Equipment Group Basic Information, Manufacturing Base and Competitors
- Table 106. China Railway Engineering Equipment Group Major Business
- Table 107. China Railway Engineering Equipment Group Shield Tunnel Boring Machine Product and Services
- Table 108. China Railway Engineering Equipment Group Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
- Table 109. China Railway Engineering Equipment Group Recent

Developments/Updates

Table 110. China Railway Engineering Equipment Group Competitive Strengths & Weaknesses

Table 111. China Railway Construction Heavy Industry Basic Information, Manufacturing Base and Competitors

Table 112. China Railway Construction Heavy Industry Major Business

Table 113. China Railway Construction Heavy Industry Shield Tunnel Boring Machine Product and Services

Table 114. China Railway Construction Heavy Industry Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. China Railway Construction Heavy Industry Recent Developments/Updates

Table 116. China Railway Construction Heavy Industry Competitive Strengths & Weaknesses

Table 117. China Communications Construction Tianhe Mechanical Equipment Basic Information, Manufacturing Base and Competitors

Table 118. China Communications Construction Tianhe Mechanical Equipment Major Business

Table 119. China Communications Construction Tianhe Mechanical Equipment Shield Tunnel Boring Machine Product and Services

Table 120. China Communications Construction Tianhe Mechanical Equipment Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. China Communications Construction Tianhe Mechanical Equipment Recent Developments/Updates

Table 122. China Communications Construction Tianhe Mechanical Equipment Competitive Strengths & Weaknesses

Table 123. Shanghai Tunnel Engineering Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 124. Shanghai Tunnel Engineering Co., Ltd. Major Business

Table 125. Shanghai Tunnel Engineering Co., Ltd. Shield Tunnel Boring Machine Product and Services

Table 126. Shanghai Tunnel Engineering Co., Ltd. Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. Shanghai Tunnel Engineering Co., Ltd. Recent Developments/Updates

Table 128. Shanghai Tunnel Engineering Co., Ltd. Competitive Strengths & Weaknesses

Table 129. Northern Heavy Industries Group Basic Information, Manufacturing Base

and Competitors

Table 130. Northern Heavy Industries Group Major Business

Table 131. Northern Heavy Industries Group Shield Tunnel Boring Machine Product and Services

Table 132. Northern Heavy Industries Group Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Northern Heavy Industries Group Recent Developments/Updates

Table 134. Northern Heavy Industries Group Competitive Strengths & Weaknesses

Table 135. Liaoning Censcience Industry Basic Information, Manufacturing Base and Competitors

Table 136. Liaoning Censcience Industry Major Business

Table 137. Liaoning Censcience Industry Shield Tunnel Boring Machine Product and Services

Table 138. Liaoning Censcience Industry Shield Tunnel Boring Machine Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Liaoning Censcience Industry Recent Developments/Updates

Table 140. Liaoning Censcience Industry Competitive Strengths & Weaknesses

Table 141. Global Key Players of Shield Tunnel Boring Machine Upstream (Raw Materials)

Table 142. Global Shield Tunnel Boring Machine Typical Customers

Table 143. Shield Tunnel Boring Machine Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Shield Tunnel Boring Machine Picture

Figure 2. World Shield Tunnel Boring Machine Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Shield Tunnel Boring Machine Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Shield Tunnel Boring Machine Production (2021-2032) & (Units)

Figure 5. World Shield Tunnel Boring Machine Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Shield Tunnel Boring Machine Production Value Market Share by Region (2021-2032)

Figure 7. World Shield Tunnel Boring Machine Production Market Share by Region (2021-2032)

Figure 8. North America Shield Tunnel Boring Machine Production (2021-2032) & (Units)

Figure 9. Europe Shield Tunnel Boring Machine Production (2021-2032) & (Units)

Figure 10. China Shield Tunnel Boring Machine Production (2021-2032) & (Units)

Figure 11. Japan Shield Tunnel Boring Machine Production (2021-2032) & (Units)

Figure 12. Shield Tunnel Boring Machine Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 15. World Shield Tunnel Boring Machine Consumption Market Share by Region (2021-2032)

Figure 16. United States Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 17. China Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 18. Europe Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 19. Japan Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 20. South Korea Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 21. ASEAN Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 22. India Shield Tunnel Boring Machine Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Shield Tunnel Boring Machine by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Shield Tunnel Boring Machine Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Shield Tunnel Boring Machine Markets in 2025

Figure 26. United States VS China: Shield Tunnel Boring Machine Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Shield Tunnel Boring Machine Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Shield Tunnel Boring Machine Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Shield Tunnel Boring Machine Production Market Share 2025

Figure 30. China Based Manufacturers Shield Tunnel Boring Machine Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Shield Tunnel Boring Machine Production Market Share 2025

Figure 32. World Shield Tunnel Boring Machine Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Shield Tunnel Boring Machine Production Value Market Share by Type in 2025

Figure 34. Single Shield TBM

Figure 35. Double Shield TBM

Figure 36. Others

Figure 37. World Shield Tunnel Boring Machine Production Market Share by Type (2021-2032)

Figure 38. World Shield Tunnel Boring Machine Production Value Market Share by Type (2021-2032)

Figure 39. World Shield Tunnel Boring Machine Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Shield Tunnel Boring Machine Production Value by Diameter, (USD Million), 2021 & 2025 & 2032

Figure 41. World Shield Tunnel Boring Machine Production Value Market Share by Diameter in 2025

Figure 42. Small Diameter

Figure 43. Medium Diameter

Figure 44. Large Diameter

Figure 45. Extra-large Diameter

Figure 46. World Shield Tunnel Boring Machine Production Market Share by Diameter (2021-2032)

Figure 47. World Shield Tunnel Boring Machine Production Value Market Share by Diameter (2021-2032)

Figure 48. World Shield Tunnel Boring Machine Average Price by Diameter (2021-2032) & (K US\$/Unit)

Figure 49. World Shield Tunnel Boring Machine Production Value by Control Configuration, (USD Million), 2021 & 2025 & 2032

Figure 50. World Shield Tunnel Boring Machine Production Value Market Share by Control Configuration in 2025

Figure 51. Conventional Hydraulic Control

Figure 52. Electro-hydraulic Integrated Control

Figure 53. World Shield Tunnel Boring Machine Production Market Share by Control Configuration (2021-2032)

Figure 54. World Shield Tunnel Boring Machine Production Value Market Share by Control Configuration (2021-2032)

Figure 55. World Shield Tunnel Boring Machine Average Price by Control Configuration (2021-2032) & (K US\$/Unit)

Figure 56. World Shield Tunnel Boring Machine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 57. World Shield Tunnel Boring Machine Production Value Market Share by Application in 2025

Figure 58. Transportation

Figure 59. Water Conservancy

Figure 60. Others

Figure 61. World Shield Tunnel Boring Machine Production Market Share by Application (2021-2032)

Figure 62. World Shield Tunnel Boring Machine Production Value Market Share by Application (2021-2032)

Figure 63. World Shield Tunnel Boring Machine Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 64. Shield Tunnel Boring Machine Industry Chain

Figure 65. Shield Tunnel Boring Machine Procurement Model

Figure 66. Shield Tunnel Boring Machine Sales Model

Figure 67. Shield Tunnel Boring Machine Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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