

Global TBM Cutter Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global TBM Cutter market size is expected to reach \$ 1602 million by 2032, rising at a market growth of 7.0% CAGR during the forecast period (2026-2032).

In 2025, global TBM Cutter production reached approximately 373k units, with an average global market price of around US\$2.6k per unit.

TBM cutters are an important part of TBM equipment, responsible for cutting geological materials such as rocks and soil to ensure smooth tunneling. TBM cutters are usually located in front of the cutterhead and are the 'forward' of the entire tunneling machine. According to the geological conditions and working mode of tunneling, TBM cutters can be divided into many types, mainly including roller cutters, scrapers and cutters.

Upstream for TBM cutters centers on high-toughness alloy/tool steels (cutter rings/bodies), tungsten carbide reinforcement (e.g., TCI inserts), high-load bearings and sealing systems, plus heat treatment and surface hardening processes. Midstream OEMs and specialist toolmakers design and manufacture disc cutters, optimize ring metallurgy and thermal treatment, and provide on-site maintenance/refurbishment to match rock strength and abrasivity. Downstream demand comes from underground infrastructure EPCs and contractors (metro, road/rail tunnels, water conveyance, utilities, mining drifts), prioritizing advance rate, cutter life and downtime risk, and overall lifecycle cost and supply assurance.

The TBM cutter market is characterized by structurally resilient demand, accelerating performance tiering, and a growing service/refurbishment component. As metros, utilities, water conveyance, and long, geologically complex tunnels expand, contractors increasingly require higher wear resistance, anti-chipping performance, and load-

bearing life?driving continuous upgrades in ring metallurgy, heat treatment, and surface engineering, alongside more robust bearing/sealing and assembly quality control. A clear trend is lifecycle-based cutter management (selection, wear monitoring, planned maintenance, refurbishment) to reduce unplanned downtime, while delivery assurance and spare-part readiness are becoming procurement priorities. Key headwinds include highly uncertain consumption rates driven by variable geology, operational constraints on cutter-change windows, and volatility in premium materials/bearings that can pressure project economics and schedule reliability; price-led commoditization in some regions also intensifies competition and raises consistency risks.

This report studies the global TBM Cutter production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global TBM Cutter total production and demand, 2021-2032, (K Units)

Global TBM Cutter total production value, 2021-2032, (USD Million)

Global TBM Cutter production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global TBM Cutter consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: TBM Cutter domestic production, consumption, key domestic manufacturers and share

Global TBM Cutter production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global TBM Cutter production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global TBM Cutter production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global TBM Cutter 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 Leitz, Sandvik, Herrenknecht, Komatsu, Betek GmbH,

Mitsubishi, Mapal, Iscar, Funik Ultrahard Material, TaeguTec, 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 TBM Cutter market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (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 TBM Cutter Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global TBM Cutter Market, Segmentation by Type:

Roller Cutters

Scrapers

Cutters

Global TBM Cutter Market, Segmentation by Cutter Type:

Single Disc Cutter

Double Disc Cutter

Triple Disc Cutter

Others

Global TBM Cutter Market, Segmentation by Sizes:

17 Inches

18 Inches

19 Inches

20 Inches

Global TBM Cutter Market, Segmentation by Application:

Subway Construction

Tunnel Excavation

Mining

Others

Companies Profiled:

Leitz

Sandvik

Herrenknecht

Komatsu

Betek GmbH

Mitsubishi

Mapal

Iscar

Funik Ultrahard Material

TaeguTec

Robbins Company

Terratec

TIX-TSK corporation

Litian Heavy Industry Machinery

Lingyuan Technology

Hengli Engineering Drilling Tools

Jiujiu Technology

Jinding Cemented Carbide

Ruifeng cemented carbide

Key Questions Answered:

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

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