

Global TBM Cutter Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global TBM Cutter market size was valued at US\$ 997 million in 2025 and is forecast to a readjusted size of US\$ 1602 million by 2032 with a CAGR of 7.0% during review period.

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 is a detailed and comprehensive analysis for global TBM Cutter 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 TBM Cutter market size and forecasts, in consumption value (\$ Million), sales quantity (K Units), and average selling prices (US\$/Unit), 2021-2032

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

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

Global TBM Cutter market shares of main players, shipments in revenue (\$ Million), sales quantity (K Units), and ASP (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 TBM Cutter

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 TBM Cutter 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 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.

Market Segmentation

TBM Cutter 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 segment by Type

Roller Cutters

Scrapers

Cutters

Market segment by Cutter Type

Single Disc Cutter

Double Disc Cutter

Triple Disc Cutter

Others

Market segment by Sizes

17 Inches

18 Inches

19 Inches

20 Inches

Market segment by Application

Subway Construction

Tunnel Excavation

Mining

Others

Major players covered

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

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)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe TBM Cutter product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of TBM Cutter, with price, sales quantity, revenue, and global market share of TBM Cutter from 2021 to 2026.

Chapter 3, the TBM Cutter competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the TBM Cutter 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 TBM Cutter 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 TBM Cutter.

Chapter 14 and 15, to describe TBM Cutter sales channel, distributors, customers, research findings and conclusion.

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