

Global Trenchless Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Trenchless Equipment market size is expected to reach \$ 7298 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Trenchless equipment comprises a specialized suite of machinery and tools designed for the installation, replacement, or rehabilitation of underground utilities with minimal surface disruption. In 2026, the technology has moved beyond simple 'no-dig' alternatives to become the primary standard for urban infrastructure renewal, particularly in 'Smart City' developments. The market is currently defined by fully electric and autonomous systems, including micro-tunneling machines (MTBMs), horizontal directional drilling (HDD) rigs, and robotic pipe-lining units. A major 2026 breakthrough is the integration of AI-enabled subterranean mapping, which allows equipment to 'see' and avoid existing utility clusters in real-time, significantly reducing the risk of accidental strikes. This equipment is essential for the rapid deployment of 5G fiber networks, water main rehabilitation, and the expansion of decentralized energy grids in densely populated environments.

In 2025, global trenchless equipment production reached approximately 11560 units, with an average global market price of around US\$ 419 thousand per unit. And global trenchless equipment production capacity reached approximately 15000 units. The average gross margin in this industry reached 18.94%.

The upstream supply chain for trenchless equipment is characterized by high-durability metallurgy and advanced hydraulic/electronic control systems. The manufacturing process requires high-strength steel for drill pipes, abrasion-resistant tungsten carbide for cutting heads, and precision sensors for guidance systems. Key upstream suppliers include SSAB and ArcelorMittal (providing high-tensile steel plates and tubes), Sandvik

AB and Kennametal Inc. (supplying specialized rock-cutting and drilling tools), and Parker-Hannifin and Bosch Rexroth (delivering the high-pressure hydraulic components and electronic controllers). In 2026, a critical upstream priority is the sourcing of lithium-ion and solid-state batteries for the growing fleet of zero-emission electric HDD rigs, as municipal regulations increasingly mandate 'noise and emission-free' construction zones.

The downstream segment involves a diverse network of civil engineering contractors, utility providers, and municipal governments. Value is realized through 'social cost' savings?minimizing traffic detours, business interruptions, and surface restoration expenses. Significant downstream customers and high-volume users include Municipal Public Works Departments (focused on aging sewer and water main rehabilitation), Telecommunications Giants (such as AT&T and Verizon, utilizing HDD for fiber-to-the-home expansion), and Global EPC Firms (like Bechtel and Quanta Services, managing large-scale energy and infrastructure projects). The 2026 downstream market is seeing a surge in Equipment-as-a-Service (EaaS), where contractors rent high-value robotic lining and tunneling equipment from specialized providers like United Rentals and Sunbelt Rentals to avoid high capital expenditures on niche projects.

This report studies the global Trenchless Equipment production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Trenchless Equipment total production and demand, 2021-2032, (K Units)

Global Trenchless Equipment total production value, 2021-2032, (USD Million)

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

Global Trenchless Equipment consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Trenchless Equipment domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Trenchless Equipment 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 Akkerman, mts Microtunneling Systems, Anhui Tangxing Machinery Equipment, RASA Industries, Herrenknecht, CRCHI, Realtop Heavy Industry, YangZhou GuangXin Heavy industry, Vermeer, Toro, 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 Trenchless Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 Trenchless Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Trenchless Equipment Market, Segmentation by Type:

Horizontal Directional Drilling Machine

Pipe Jacking Machine

Others

Global Trenchless Equipment Market, Segmentation by Diameter:

Small Diameter

Medium Diameter

Large Diameter

Global Trenchless Equipment Market, Segmentation by Power Source:

Diesel Engine

Electric Drive

Others

Global Trenchless Equipment Market, Segmentation by Application:

Water Supply Industry

Oil and Gas Industry

Power Industry

Communications Industry

Others

Companies Profiled:

Akkerman

mts Microtunneling Systems

Anhui Tangxing Machinery Equipment

RASA Industries

Herrenknecht

CRCHI

Realtop Heavy Industry

YangZhou GuangXin Heavy industry

Vermeer

Toro

XCMG

Dilong

Drillto

TRACTO-TECHNIK

Zoomlion

H.H. Drill-Tech Drilling Machinery

Terra

Key Questions Answered:

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

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