

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

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Abstracts

The global Tunnel Boring Machine market size is expected to reach \$ 4423 million by 2032, rising at a market growth of 4.9% CAGR during the forecast period (2026-2032).

In 2025, global Tunnel Boring Machine production capacity is 1,000 units, with production reached approximately 748 units, with an average global market price of around US\$ 4.16 million per unit. The market gross margin is mainly 30%-40%.

Tunnel Boring Machine refers to specialized sets of equipment used in underground tunnel, roadway, and underground space engineering to achieve mechanized and continuous excavation and support construction. This type of equipment completes tunnel excavation through roller cutter rock breaking or controlled cutting methods, and is coordinated with synchronous lining, support, excavated soil transportation, and attitude control systems to achieve comprehensive control over stratum stability, construction safety, and tunneling efficiency. Tunnel Boring Machine is usually highly customized according to different geological conditions and is suitable for soft soil, composite strata, and hard rock environments. It is widely used in urban rail transit, highway and railway tunnels, water conservancy and hydropower projects, underground utility tunnels, and mining construction, and is one of the core equipment with the highest technical complexity and system integration in underground infrastructure engineering.

The upstream of the tunneling machinery industry chain mainly consists of suppliers of key raw materials and core components, including high-strength steel structural materials, hydraulic systems, motors and reducers, large bearings, hobbing cutters, electrical and automation control systems, and sensing and monitoring equipment. The midstream comprises the complete machine manufacturing and system integration

stages, where manufacturers need to conduct customized designs based on engineering geological conditions, complete structural manufacturing, assembly, commissioning, and on-site delivery, and provide long-term technical service support. The downstream mainly consists of engineering owners and construction units in the infrastructure construction and resource development fields, such as urban rail transit companies, railway and highway construction companies, water conservancy and hydropower investment entities, and large mining enterprises. The overall industry chain exhibits clear characteristics of project-driven, order-based production, and service orientation.

The tunnel boring machine (TBM) market presents significant long-term growth potential, as these massive excavation systems—capable of boring through soil, rock, and mixed ground conditions with precision while simultaneously installing tunnel linings—are increasingly indispensable for global infrastructure development, driven by rapid urbanization, population growth, and the rising need for sustainable underground transportation, utility, and water management solutions; governments and private investors worldwide are prioritizing metro rail expansions, high-speed rail projects, cross-border tunnels, underground highways, and urban utility corridors to reduce congestion, cut emissions, and improve connectivity, with Asia-Pacific leading demand due to mega-projects in China, India, and Southeast Asia, while Europe and North America continue to invest heavily in modernizing transit networks, sewage systems, and hydroelectric projects; technological innovations such as slurry TBMs, Earth Pressure Balance (EPB) machines, dual-mode TBMs, and large-diameter mega-borers are enhancing adaptability to diverse geological conditions, minimizing risks, and improving efficiency, while real-time monitoring, automation, and AI-driven control systems are increasing accuracy, safety, and productivity; TBMs also support environmental sustainability by reducing surface disruption compared to conventional drilling and blasting, aligning with stricter regulatory frameworks and green infrastructure goals; the energy sector further fuels demand, as TBMs are deployed in hydropower projects, underground power plants, and oil & gas pipelines; although high capital investment, complex maintenance, and project-specific customization remain barriers, rising government infrastructure budgets, availability of financing models such as PPP (Public-Private Partnerships), and a growing emphasis on long-term cost efficiency make TBMs a preferred choice; aftermarket opportunities in refurbishment, spare parts, and leasing models also strengthen market sustainability, ensuring continuous demand across both developed economies with aging infrastructure and emerging markets undertaking ambitious new projects, firmly positioning TBMs as critical enablers of modern underground construction worldwide.

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

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

Highlights and key features of the study

Global Tunnel Boring Machine total production and demand, 2021-2032, (Units)

Global Tunnel Boring Machine total production value, 2021-2032, (USD Million)

Global Tunnel Boring Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Tunnel Boring Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Tunnel Boring Machine domestic production, consumption, key domestic manufacturers and share

Global Tunnel Boring Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Tunnel Boring Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Tunnel Boring Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global 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 China Railway Hi-tech Industry Corporation Limited, Herrenknecht, China Railway Construction Heavy Industry Corporation Limited, CCCC Tianhe Xi'an Equipment Manufacturing Co., Ltd, Robbins, JIMT, UGITEC, NHI,

Liaoning Conscience Industrial Co., Ltd, Terratec, 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 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 Tunnel Boring Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tunnel Boring Machine Market, Segmentation by Type:

Soft Ground TBMs

Hard Rock TBMs

Global Tunnel Boring Machine Market, Segmentation by Diameter:

Less than 6m

6-8m

More than 8m

Global Tunnel Boring Machine Market, Segmentation by Shape:

Round Tunneling Machine

Rectangular and Irregular Tunneling Machine

Global Tunnel Boring Machine Market, Segmentation by Application:

Urban Rail Transit Systems

Railways And Highways

Municipal Engineering

Others

Companies Profiled:

China Railway Hi-tech Industry Corporation Limited

Herrenknecht

China Railway Construction Heavy Industry Corporation Limited

CCCC Tianhe Xi'an Equipment Manufacturing Co., Ltd

Robbins

JIMT

UGITEC

NHI

Liaoning Conscience Industrial Co., Ltd

Terratec

Shanghai Tunnel Engineering Co.,Ltd

Komatsu

Key Questions Answered:

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

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