

# Global Tunnel Boring Machine (TBM) 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 Tunnel Boring Machine (TBM) market size was valued at US\$ 4663 million in 2025 and is forecast to a readjusted size of US\$ 6060 million by 2032 with a CAGR of 3.9% during review period.

A tunnel boring machine (TBM) is a machine used to excavate tunnels with a circular cross section through a variety of soil and rock strata. They may also be used for micro tunneling. In Japan and China, the machines used for soil are called shield tunneling machines and machines used for hard rock are called tunnel boring machine. But in Europe and USA, they are called the same name tunnel boring machine. The research we did include all of them.

In 2024, global tunnel boring machine (TBM) sales volume reached approximately 800 units, with an average global market price of around US\$ 5.50 million per unit.

Global tunnel boring machine (TBM) key players include Herrenknecht, CRCHI etc. Global top 3 manufacturers hold a share over 65%. Asia-Pacific is the largest market, with a share about 60%?

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

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

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

Global Tunnel Boring Machine (TBM) market shares of main players, shipments in revenue (\$ Million), sales quantity (Unit), and ASP (K USD/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 Tunnel Boring Machine (TBM)

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 Tunnel Boring Machine (TBM) 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 CRHIC, Herrenknecht, CRCHI, Tianhe Mechanical Equipment, Liaoning Censcience Industry Co., Ltd, JIMT, Robbins, Komatsu, Shanghai Tunnel Engineering Co., Ltd, Hitachi Zosen, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

### **Market Segmentation**

Tunnel Boring Machine (TBM) 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

Soft Ground TBMs

Hard Rock TBMs

Market segment by Application

City Rail System

Railway and Highway

Municipal Engineering

Others

#### Major players covered

CRHIC

Herrenknecht

CRCHI

Tianhe Mechanical Equipment

Liaoning Censcience Industry Co., Ltd

JIMT

Robbins

Komatsu

Shanghai Tunnel Engineering Co., Ltd

Hitachi Zosen

Kawasaki

Terratec

Xugong Kaigong

#### **Market segment by region, regional analysis covers**

*Global Tunnel Boring Machine (TBM) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 20...*

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 Tunnel Boring Machine (TBM) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Tunnel Boring Machine (TBM), with price, sales quantity, revenue, and global market share of Tunnel Boring Machine (TBM) from 2021 to 2026.

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

Chapter 4, the Tunnel Boring Machine (TBM) 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 Tunnel Boring Machine (TBM) 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 Tunnel Boring Machine (TBM).

Chapter 14 and 15, to describe Tunnel Boring Machine (TBM) sales channel,

distributors, customers, research findings and conclusion.

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