

Global Tunnelling Slurry Separation Plant Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tunnelling Slurry Separation Plant market size is expected to reach \$ 1050 million by 2032, rising at a market growth of 6.0% CAGR during the forecast period (2026-2032).

Tunnelling Slurry Separation Plants are modular treatment systems used to separate excavated soil, sand, gravel, clay, and suspended solids from slurry generated during slurry shield tunnelling, pipe jacking, microtunnelling, diaphragm wall construction, and other underground excavation projects. They recover usable bentonite or process slurry, reduce waste volume, control slurry density, and support stable excavation performance. Typical systems include coarse screens, desanders, desilters, hydrocyclones, vibrating screens, centrifuges, pumps, tanks, dosing units, pipelines, control cabinets, and sludge discharge equipment. This category excludes general wastewater treatment plants, mining tailings systems, standalone pumps, individual screens, complete tunnel boring machines, and civil construction services. The industrial chain of Tunnelling Slurry Separation Plants includes upstream suppliers of steel structures, vibrating screens, hydrocyclones, pumps, valves, pipelines, wear-resistant liners, centrifuges, tanks, motors, sensors, control cabinets, frequency converters, dosing systems, filter components, rubber parts, bearings, electrical components, welding services, machining services, surface-treatment services, and automation software. The midstream consists of slurry treatment and tunnelling equipment manufacturers that design and assemble screening modules, desanding units, desilting units, slurry storage systems, pump stations, control platforms, sludge discharge systems, and project-specific modular layouts. Downstream users include tunnelling contractors, pipe jacking companies, metro construction firms, water conservancy projects, municipal engineering contractors, underground utility builders, diaphragm wall contractors, foundation engineering companies, and equipment rental service providers.

The Tunnelling Slurry Separation Plant market is supported by urban rail transit, underground utility construction, water conveyance tunnels, pipe jacking, and difficult-ground tunnelling where slurry quality directly affects excavation stability and waste-disposal cost. Demand is moving from simple desanding equipment toward integrated slurry management stations that can handle variable geology, reduce bentonite consumption, lower spoil volume, and keep slurry parameters stable during continuous excavation. Buyers care about treatment efficiency, screen and cyclone wear life, system layout flexibility, automation level, mud-density control, energy consumption, and service response at project sites. Standard modular plants face price comparison, while stations designed for complex soil, large slurry flow, compact job sites, and strict environmental requirements have better pricing resilience. Main challenges include project-based demand volatility, heavy transport and installation work, abrasive material wear, site space limits, and the need to prove separation performance under actual ground conditions. In 2025, global Tunnelling Slurry Separation Plant production reached approximately 895 units, with an average global market price of around US\$760,000 per unit. The gross profit margin of major companies in the industry ranged from 27% to 44%. In 2025, the global production capacity of Tunnelling Slurry Separation Plants was approximately 1,193 units.

Report Scope

This report studies the global Tunnelling Slurry Separation Plant production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tunnelling Slurry Separation Plant 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 Tunnelling Slurry Separation Plant that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tunnelling Slurry Separation Plant total production and demand, 2021-2032, (Units)

Global Tunnelling Slurry Separation Plant total production value, 2021-2032,

(USD Million)

Global Tunnelling Slurry Separation Plant production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Tunnelling Slurry Separation Plant consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Tunnelling Slurry Separation Plant domestic production, consumption, key domestic manufacturers and share

Global Tunnelling Slurry Separation Plant production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Tunnelling Slurry Separation Plant production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Tunnelling Slurry Separation Plant production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Tunnelling Slurry Separation Plant 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 Herrenknecht AG, SCHAUBURG Maschinen- und Anlagen-Bau GmbH, BAUER Maschinen GmbH (BAUER MAT Slurry Handling Systems), MS SAS, SOTRES (BS MINERAL), Tecnoidea Impianti S.r.l., Derrick Corporation, Elgin Separation Solutions (Astec), Hirosawa Machinery Co.,Ltd., SAN OH CO.,LTD., 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 Tunnelling Slurry Separation Plant 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 Tunnelling Slurry Separation Plant Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Tunnelling Slurry Separation Plant Market, Segmentation by Type:

Screening and Hydrocyclone Slurry Separation Plant

Centrifuge-Finished Slurry Separation Plant

Filter-Press-Finished Slurry Separation Plant

Combined Centrifuge and Filter-Press Slurry Separation Plant

Global Tunnelling Slurry Separation Plant Market, Segmentation by Installation Configuration:

Single-Module Transportable Slurry Separation Plant

Multi-Module Skid-Mounted Slurry Separation Plant

Global Tunnelling Slurry Separation Plant Market, Segmentation by System Functional Boundaries:

Separation-Only Slurry Treatment Plant

Separation and Slurry-Conditioning Plant

Integrated Separation, Slurry Conditioning and Residual Sludge Dewatering Plant

Global Tunnelling Slurry Separation Plant Market, Segmentation by Rated Mud Handling Capacity:

Nominal Slurry Throughput Up to 100 Cubic Metres per Hour

Nominal Slurry Throughput Above 100 to 300 Cubic Metres per Hour

Nominal Slurry Throughput Above 300 to 1,000 Cubic Metres per Hour

Nominal Slurry Throughput Above 1,000 to 2,000 Cubic Metres per Hour

Nominal Slurry Throughput Above 2,000 Cubic Metres per Hour

Global Tunnelling Slurry Separation Plant Market, Segmentation by Application:

Urban Rail Transit Infrastructure

Road Transport Infrastructure

Mainline Railway Infrastructure

Water Supply and Water Transfer Infrastructure

Sewerage and Drainage Infrastructure

Oil and Gas Pipeline Infrastructure

Electric Power Cable and Utility Conduit Infrastructure

Hydropower Infrastructure

Mining Infrastructure

Other Civil Underground Infrastructure

Companies Profiled:

Herrenknecht AG

SCHAUENBURG Maschinen- und Anlagen-Bau GmbH

BAUER Maschinen GmbH (BAUER MAT Slurry Handling Systems)

MS SAS

SOTRES (BS MINERAL)

Tecnoidea Impianti S.r.l.

Derrick Corporation

Elgin Separation Solutions (Astec)

Hirosawa Machinery Co.,Ltd.

SAN OH CO.,LTD.

RASATEC CO.,LTD.

Hebei GN Solids Control Co., Ltd.

Xi'an Brightway Energy Machinery Equipment Co., Ltd.

Xi'an KOSUN Machinery Co., Ltd.

Xi'an Tianrui Petroleum Machinery Equipment Co., Ltd.

Tangshan Dachuan Mechanical Equipment Co., Ltd.

Luoyang Longzhong Heavy Machinery Co., Ltd.

JIM TECHNOLOGY CORPORATION

Key Questions Answered:

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

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