

Global Earth Pressure Balance (EPB) TBM Market Growth 2026-2032

<https://marketpublishers.com/r/GD7A2C92306FEN.html>

Date: May 2026

Pages: 127

Price: US\$ 3,660.00 (Single User License)

ID: GD7A2C92306FEN

Abstracts

The global Earth Pressure Balance (EPB) TBM market size is predicted to grow from US\$ 5893 million in 2025 to US\$ 9912 million in 2032; it is expected to grow at a CAGR of 5.3% from 2026 to 2032.

Earth Pressure Balance Tunnel Boring Machine (EPB TBM):

An EPB TBM is a type of tunnel boring machine designed for soft soil, clay, or silt ground conditions. It maintains face stability by balancing earth pressure at the tunnel front, transports excavated material through a screw conveyor, and simultaneously installs tunnel lining segments, ensuring safe and continuous tunnel excavation. In 2025, global EPB TBM production reached approximately 1434 units, with an average global market price of around US\$ 4.2 Million per unit. Annual production capacity is 1500 Units. Gross Profit Margin?18.12%. The EPB TBM industry chain consists of upstream raw materials, core component manufacturing, final machine assembly, and downstream tunnel construction services. Upstream, high-strength steel, hydraulic systems, precision electronics, and specialized alloys are essential for building durable and reliable machines. Core components, such as cutterheads, screw conveyors, and shield sections, are produced by specialized suppliers before integration into the complete TBM. Downstream, construction companies deploy EPB TBMs in urban metro systems, municipal utility tunnels, highways, railways, and hydropower projects, often accompanied by long-term maintenance and technical support contracts. This integrated chain ensures continuous innovation, operational precision, and reliability in complex tunneling projects. EPB TBMs represent an impressive combination of heavy machinery, precision engineering, and urban infrastructure development. Their high unit cost is justified by customized design, advanced technology, and their critical role in safely and efficiently completing large-scale tunnel projects. With global urbanization

and infrastructure investment continuing to expand, EPB TBMs offer a niche yet steadily growing market opportunity for manufacturers and service providers, particularly in Asia-Pacific and Europe, where major tunneling projects are most active.

United States market for Earth Pressure Balance (EPB) TBM is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Earth Pressure Balance (EPB) TBM is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Earth Pressure Balance (EPB) TBM is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Earth Pressure Balance (EPB) TBM players cover Herrenknecht AG (Germany), China Railway Construction Heavy Industry Corporation Limited (China), China Railway Engineering Equipment Group Co., Ltd. (China), The Robbins Company (United States), Hitachi Zosen Corporation (Japan), etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the "Earth Pressure Balance (EPB) TBM Industry Forecast" looks at past sales and reviews total world Earth Pressure Balance (EPB) TBM sales in 2025, providing a comprehensive analysis by region and market sector of projected Earth Pressure Balance (EPB) TBM sales for 2026 through 2032. With Earth Pressure Balance (EPB) TBM sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Earth Pressure Balance (EPB) TBM industry.

This Insight Report provides a comprehensive analysis of the global Earth Pressure Balance (EPB) TBM landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Earth Pressure Balance (EPB) TBM portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Earth Pressure Balance (EPB) TBM market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Earth Pressure Balance (EPB) TBM and breaks down the

forecast by Propulsion / Drive Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Earth Pressure Balance (EPB) TBM.

This report presents a comprehensive overview, market shares, and growth opportunities of Earth Pressure Balance (EPB) TBM market by product type, application, key manufacturers and key regions and countries.

Segmentation by Propulsion / Drive Type:

Hydraulic Drive EPB

Electric Drive EPB

Segmentation by Ground / Soil Type:

Soft Soil EPB

Mixed Ground EPB

High Water Pressure EPB

Segmentation by Tunnel Diameter:

Small-Diameter TBM

Medium-Diameter TBM

Large-Diameter TBM

Segmentation by Application:

Hydropower

Urban Construction

Industrial

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Herrenknecht AG (Germany)

China Railway Construction Heavy Industry Corporation Limited (China)

China Railway Engineering Equipment Group Co., Ltd. (China)

The Robbins Company (United States)

Hitachi Zosen Corporation (Japan)

Mitsubishi Heavy Industries, Ltd. (Japan)

Komatsu Ltd. (Japan)

Kawasaki Heavy Industries, Ltd. (Japan)

IHI Corporation (Japan)

Terratec Ltd. (Australia)

NFM Technologies (France)

Xugong Kaigong Machinery Co., Ltd.

Tianhe Mechanical Equipment Manufacturing Co., Ltd.

Liaoning Censcience Industry Co., Ltd.

Shanghai Tunnel Engineering Co., Ltd.

Dalian Huarui Heavy Industry Group Co., Ltd.

Soilmec S.p.A. (Italy)

SELI Overseas S.p.A. (Italy)

Gulermak Aglr Sanayi Insaat Ve Taahhut AS (Turkey)

Dong?Ah Geological Engineering Co., Ltd. (South Korea)

Key Questions Addressed in this Report

What is the 10-year outlook for the global Earth Pressure Balance (EPB) TBM market?

What factors are driving Earth Pressure Balance (EPB) TBM market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Earth Pressure Balance (EPB) TBM market opportunities vary by end market size?

How does Earth Pressure Balance (EPB) TBM break out by Propulsion / Drive Type, by Application?

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