

# Earth Pressure Balance Shields Market to Grow at 7.7% CAGR from 2025-2029

*The Business Research Company's Earth Pressure Balance Shields Market to Grow at 7.7% CAGR from 2025-2029*

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What Is The [Earth Pressure Balance Shields Market Size](#) And Growth?

Over the past few years, the market size for earth pressure balance shields has seen significant growth. The market, which was worth \$2.39 billion in 2024, is projected to rise to \$2.58 billion in 2025, reflecting an 8.0% compound annual growth rate (CAGR). This historic growth can be linked to the escalating demand for underground structures, a surge in soft ground tunneling projects, increased funding in metro rail systems, the expansion of mechanized tunneling methods, and the growing issue of urban congestion.

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It will grow to \$3.46 billion in 2029 at a compound annual growth rate (CAGR) of 7.7%.”

*The Business Research Company*

Anticipated to experience robust expansion in future years, the market for earth pressure balance shields is predicted to reach \$3.46 billion by 2029, achieving a compound annual growth rate (CAGR) of 7.7%. Factors such as growing urban population density, increasing emphasis on developing sustainable infrastructure, expansion in developing countries, growth in smart city projects and amplified government funds for sturdy infrastructure are contributing to the growth during the predicted period. Key market trends include enhanced tunneling solutions, progress in EPB machine automation and sensor incorporation, integration with digital twin, and BIM (building information modeling), advancements in modular design, and the inclusion of automation.

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### What Are The Current Leading Growth Drivers For Earth Pressure Balance Shields Market?

The accelerated demand for infrastructure is foreseen to trigger the upward trend in the earth pressure balance shields market. This demand concerns the escalating requirement for the creation, enlargement, and upkeep of crucial public systems including transport routes, utilities, and city planning projects. The spur in infrastructure requirement arises due to speedy urbanization, where the burgeoning urban populace demands larger transportation webs, necessity for water supply, sewage systems, and utilities to cater to their daily essentials. To cater to this infrastructure demand, earth pressure balance shields provide an efficient, risk-free, and economical option for tunnel development in softer ground conditions, minimizing surface disturbances while developing underground infrastructure. To illustrate, in July 2025, a paper issued by the Office for National Statistics, a governmental department in the UK, showed that complete funding in the infrastructure sector hit \$27.57 billion (£20.3 billion) in 2024, noting a 16.9% soar compared to 2023. Thus, the escalated requirement for infrastructure is fuelling the expansion of the earth pressure balance shields market.

### Which Companies Are Currently Leading In The Earth Pressure Balance Shields Market?

Major players in the Earth Pressure Balance Shields Global Market Report 2025 include:

- Mitsubishi Heavy Industries Ltd.
- XCMG Kaigong Heavy Industry Co Ltd
- Kawasaki Heavy Industries Ltd.
- Shanghai Tunnel Engineering Co Ltd.
- China Railway Hi-Tech Industry
- Hitachi Zosen Corporation
- Dalian Huarui Heavy Industry Group Co Ltd.
- Tolian Heavy Industry & Technology Co Ltd.
- The Robbins Company
- Herrenknecht AG

### What Are The Prominent Trends In The Earth Pressure Balance Shields Market?

Leading firms in the earth pressure balance shields market are concentrating on cutting-edge technology like autonomous tunnel boring machine technology to boost infrastructure development. This technology involves the application of artificial intelligence and automated control systems that allow a tunnel boring machine to execute recurring excavation tasks, navigation, and supervision functions with superior precision, all under the supervision of operators. For example, in September 2023, the Australian engineering, property, and infrastructure company, Gamuda AU, rolled out its first autonomous tunnel boring machine (TBM) in Australia. This was done as a part of the Sydney Metro West – West-Western Tunneling Package, marking the first use of such an autonomous TBM technology in Australia and signifying a remarkable progress in tunneling innovation in the region. Collaborating with Laing O'Rourke, Gamuda is constructing twin 9-kilometer tunnels that will run between Sydney Olympic Park and Westmead, a critical segment of the 24-kilometer Sydney Metro West line which will link the Sydney CBD to Parramatta. This milestone marks the premier utilization of

autonomous TBM technology in Australia, demonstrating a significant advancement in tunneling efficiency and safety.

#### How Is The Earth Pressure Balance Shields Market Segmented?

The earth pressure balance shields market covered in this report is segmented –

- 1) By Type: Single Shield, Double Shield, Gripper Tunnel Boring Machine (TBM)
- 2) By Technology: Conventional Earth Pressure Balance Technology, Advanced Earth Pressure Balance Technology, Hybrid Systems
- 3) By Operating Depth: Shallow Depth Tunneling, Deep Depth Tunneling
- 4) By Application: Urban Tunneling, Infrastructure Development, Mining Operations, Pipeline Construction
- 5) By End-User Industry: Civil Engineering, Utilities, Oil And Gas, Transportation

#### Subsegments:

- 1) By Single Shield, Soft Ground Tunnel Boring Machine (TBM), Hard Rock Tunnel Boring Machine (TBM), Mixed Ground Tunnel Boring Machine (TBM), Slurry Tunnel Boring Machine (TBM)
- 2) By Double Shield: Open Gripper Tunnel Boring Machine (TBM), Closed Gripper Tunnel Boring Machine (TBM), Hard Rock Double Shield Tunnel Boring Machine (TBM), Mixed Face Double Shield Tunnel Boring Machine (TBM)
- 3) By Gripper Tunnel Boring Machine (TBM): Open Gripper Tunnel Boring Machine (TBM), Closed Gripper Tunnel Boring Machine (TBM), Hard Rock Gripper Tunnel Boring Machine (TBM), Mixed Ground Gripper Tunnel Boring Machine (TBM)

View the full earth pressure balance shields market report:

<https://www.thebusinessresearchcompany.com/report/earth-pressure-balance-shields-global-market-report>

#### Which Is The Dominating Region For The Earth Pressure Balance Shields Market?

In the 2025 global market report for earth pressure balance shields, Asia-Pacific emerged as the leading region in 2024 and is projected to experience the highest growth rate in the forecast period. The report provides coverage for several regions including Asia-Pacific, Western Europe, Eastern Europe, North America, South America, the Middle East, and Africa.

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Speak With Our Expert:

Saumya Sahay

Americas +1 310-496-7795

Asia +44 7882 955267 & +91 8897263534

Europe +44 7882 955267

Email: [saumyas@tbrc.info](mailto:saumyas@tbrc.info)

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Oliver Guirdham

The Business Research Company

+44 7882 955267

[info@tbrc.info](mailto:info@tbrc.info)

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