

Global In-Pipe Hydro Turbine 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 In-Pipe Hydro Turbine market size was valued at US\$ 366 million in 2025 and is forecast to a readjusted size of US\$ 511 million by 2032 with a CAGR of 4.9% during review period.

An in-pipe hydro turbine is a small-scale energy generation system that captures the kinetic energy of water flowing through existing pipelines and converts it into electricity. Unlike traditional hydropower, it does not require dams or large infrastructure; instead, it is installed within water distribution systems, irrigation canals, or industrial pipelines where pressure or flow is already present. By harnessing otherwise wasted hydraulic energy, in-pipe hydro turbines provide a renewable and decentralized source of power, which can be used for grid supply, backup energy, or powering sensors and monitoring equipment, while simultaneously improving the efficiency of water networks. The industry's gross profit margin is between 25% and 40%.

The upstream of in-pipe hydro turbines mainly involves manufacturers of hydraulic components, turbine blades, generators, sensors, and pipeline materials, along with engineering firms that design water flow optimization and integration systems. It also depends on municipal water authorities, agricultural irrigation providers, and industrial pipeline operators who supply the infrastructure within which these turbines can be embedded. Downstream, the technology serves utilities seeking renewable energy integration, municipalities aiming to enhance the efficiency and sustainability of water distribution networks, farms and agribusinesses looking to generate on-site power, and industries that want to offset energy costs or improve ESG performance, with further applications in powering remote monitoring systems and contributing to localized microgrids.

The growth of the in-pipe hydro turbine market is primarily driven by the need for energy conservation and carbon reduction in water systems, the rising demand for residual pressure recovery within pipeline networks, and sustained investment in distributed renewable energy. Municipal water supply, industrial circulating water, agricultural irrigation, and water treatment systems frequently feature points where excess pressure must be dissipated via pressure-reducing valves; in-pipe turbines can convert this otherwise wasted pressure energy into electricity without compromising the system's primary water transport function, thereby enabling the synergistic operation of water supply and power generation—a capability that offers significant economic value amidst rising energy costs and increasingly stringent carbon reduction mandates. Furthermore, compared to conventional hydropower plants, in-pipe hydropower systems leverage existing pipeline infrastructure, eliminating the need for large dams or reservoirs, minimizing land use and ecological impact, and offering shorter project construction timelines. As technologies such as Pumps as Turbines (PAT), high-efficiency permanent magnet generators, variable frequency drives, smart valves, and remote monitoring mature, equipment costs and maintenance complexities are decreasing while the applicable ranges of flow rates and pressures expand. Additionally, policy support across various nations—targeting water infrastructure upgrades, energy efficiency improvements, urban decarbonization, and industrial waste energy utilization—is encouraging water utilities and industrial users to retrofit traditional pressure-reducing stations into energy recovery nodes, further broadening the scope for in-pipe turbine applications in municipal water supply, industrial water systems, and irrigation networks.

Report Scope

This report is a detailed and comprehensive analysis for global In-Pipe Hydro Turbine 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 In-Pipe Hydro Turbine market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global In-Pipe Hydro Turbine market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global In-Pipe Hydro Turbine market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global In-Pipe Hydro Turbine market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/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 In-Pipe Hydro Turbine

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 In-Pipe Hydro Turbine 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 Daikin, Gugler Water Turbines, Gilkes, Canyon Hydro, InPipe Energy, Rentricity, Ossberger, Easy Hydro, PowerTurbines, Suneco Hydro, etc.

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

In-Pipe Hydro Turbine 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 Segmentation

Market segment by Type

Micro

Small

Medium

Large

Market segment by Power

?10kW

10–50kW

50–100kW

>100kW

Market segment by Head

Low-head Type

Medium-head Type

High-head Type

Market segment by Application

Municipal

Industrial

Agricultural Irrigation

Others

Major players covered

Daikin

Gugler Water Turbines

Gilkes

Canyon Hydro

InPipe Energy

Rentricity

Ossberger

Easy Hydro

PowerTurbines

Suneco Hydro

Energy Systems & Design

DIVE Turbinen

Ningbo Zhongce Electronics

Market segment by region, regional analysis covers

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)

Chapter Outline

Chapter 1, to describe In-Pipe Hydro Turbine product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of In-Pipe Hydro Turbine, with price, sales quantity, revenue, and global market share of In-Pipe Hydro Turbine from 2021 to 2026.

Chapter 3, the In-Pipe Hydro Turbine competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the In-Pipe Hydro Turbine 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 In-Pipe Hydro Turbine 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 In-Pipe Hydro Turbine.

Chapter 14 and 15, to describe In-Pipe Hydro Turbine sales channel, distributors, customers, research findings and conclusion.

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