

Global In-Pipe Water Turbine Generator Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global In-Pipe Water Turbine Generator market size is expected to reach \$ 511 million by 2032, rising at a market growth of 4.9% CAGR during the forecast period (2026-2032).

An In-Pipe Water Turbine Generator is a small-scale hydroelectric system installed directly within existing water pipelines to generate electricity from the kinetic or pressure energy of flowing water. Unlike traditional hydropower plants, it does not require dams or large infrastructure; instead, it leverages the natural or engineered flow of municipal, industrial, or agricultural water systems. The turbine, placed inside the pipe, converts water flow into rotational energy, which is then transformed into electrical power through a generator. This technology is often used for distributed renewable energy generation, powering sensors or remote equipment, and contributing to energy recovery in water distribution networks while maintaining normal water delivery functions.

The upstream of an In-Pipe Water Turbine Generator primarily involves materials and components such as turbine blades, micro-generators, sensors, power electronics, and pipeline integration equipment, along with engineering services for system design and hydraulic optimization. It also relies on water infrastructure providers, municipal utilities, and industrial pipeline operators that supply the installation environment. The downstream includes municipal water utilities, industrial plants, agricultural irrigation networks, and smart water management systems that adopt these generators to recover energy, lower operational costs, and support sustainability goals. In addition, downstream applications extend to powering distributed monitoring devices, integrating with microgrids, and contributing to renewable energy portfolios for urban and industrial users. The industry's gross profit margin is between 25% and 40%.

The growth of the in-pipe water turbine generator market is primarily driven by factors such as the utilization of residual pressure in water supply networks, rising energy costs, energy-efficiency upgrades to water infrastructure, and the increasing demand for distributed clean energy. Municipal water supply, industrial circulating water, agricultural irrigation, water treatment, and long-distance water conveyance systems contain numerous points where residual pressure must be dissipated via pressure-reducing valves or control facilities; in-pipe hydro-generators can harness this otherwise wasted hydraulic energy to drive power generation directly. This enables energy recovery while maintaining standard supply pressure and flow rates, thereby reducing electricity costs for water utilities and industrial users. Compared to traditional hydropower projects, these units are typically deployed within existing pipelines, eliminating the need for large dams, reservoirs, or complex water diversion infrastructure; they require less space, have a relatively limited environmental footprint, and are better suited for distributed deployment in urban and industrial settings. Meanwhile, ongoing advancements in technologies—such as permanent magnet synchronous generators, high-efficiency turbines, pump-as-turbine (PAT) technology, variable frequency control, intelligent pressure regulation, and remote monitoring—allow the equipment to accommodate wider fluctuations in flow and pressure while enhancing generation efficiency and operational reliability under low-load conditions. As nations continue to advance the modernization of water supply facilities, industrial energy conservation and decarbonization, renewable energy utilization, and the green transformation of urban infrastructure, the retrofitting of traditional pressure-reduction points into energy-recovery nodes—capable of both pressure regulation and power generation—is expected to further drive the adoption of in-pipe hydro-generators across municipal water services, industrial water systems, and agricultural irrigation.

Report Scope

This report studies the global In-Pipe Water Turbine Generator production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for In-Pipe Water Turbine Generator 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 In-Pipe Water Turbine Generator that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global In-Pipe Water Turbine Generator total production and demand, 2021-2032, (Units)

Global In-Pipe Water Turbine Generator total production value, 2021-2032, (USD Million)

Global In-Pipe Water Turbine Generator production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global In-Pipe Water Turbine Generator consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: In-Pipe Water Turbine Generator domestic production, consumption, key domestic manufacturers and share

Global In-Pipe Water Turbine Generator production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global In-Pipe Water Turbine Generator production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global In-Pipe Water Turbine Generator production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global In-Pipe Water Turbine Generator 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World In-Pipe Water Turbine Generator market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (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 In-Pipe Water Turbine Generator Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global In-Pipe Water Turbine Generator Market, Segmentation by Type:

Micro

Small

Medium

Large

Global In-Pipe Water Turbine Generator Market, Segmentation by Power:

?10kW

10–50kW

50–100kW

>100kW

Global In-Pipe Water Turbine Generator Market, Segmentation by head:

Low-head Type

Medium-head Type

High-head Type

Global In-Pipe Water Turbine Generator Market, Segmentation by Application:

Municipal

Industrial

Agricultural Irrigation

Others

Companies Profiled:

Daikin

Gugler Water Turbines

Gilkes

Canyon Hydro

InPipe Energy

Rentricity

Ossberger

Easy Hydro

PowerTurbines

Suneco Hydro

Energy Systems & Design

DIVE Turbinen

Ningbo Zhongce Electronics

Key Questions Answered

1. How big is the global In-Pipe Water Turbine Generator market?
2. What is the demand of the global In-Pipe Water Turbine Generator market?
3. What is the year over year growth of the global In-Pipe Water Turbine Generator

market?

4. What is the total value of the global In-Pipe Water Turbine Generator market?
5. Who are the Major Players in the global In-Pipe Water Turbine Generator market?
6. What are the growth factors driving the market demand?

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