

Europe Pipe Relining Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/E142BB2F6DFDEN.html>

Date: April 2026

Pages: 236

Price: US\$ 3,450.00 (Single User License)

ID: E142BB2F6DFDEN

Abstracts

The Europe Pipe Relining Market is projected to grow significantly, reaching an estimated US\$ 1,453.4 million by 2031, up from US\$ 1,009.2 million in 2024. This growth represents a compound annual growth rate (CAGR) of 5.6% from 2025 to 2031, driven by various factors including aging infrastructure, urbanization, and advancements in trenchless technology.

Executive Summary and Market Analysis

Key countries contributing to the expansion of the pipe relining market in Europe include Germany, France, Italy, Spain, Belgium, the Netherlands, Russia, Sweden, and the UK. Notable developments in the region include a collaboration between Linde Engineering and Shell Deutschland GmbH in 2024 to establish a 100-megawatt renewable hydrogen plant for the REFHYNE II project at the Shell Energy and Chemicals Park in Wesseling, Germany. Additionally, in February 2025, Salzgitter AG began constructing a 100 MW electrolysis plant in Germany, which is expected to produce around 9,000 tonnes of green hydrogen annually for carbon-reduced steel production starting in 2026.

In 2023, the German and Italian governments announced a joint initiative to develop a gas pipeline spanning approximately 3,300 km, involving four European transmission system operators: Trans Austria Gasleitung, Snam, Bayernets, and Gas Connect Austria. This project, along with the establishment of gas and hydrogen pipelines across the Alps, is expected to enhance energy supply and inter-European energy trade.

In January 2025, Evonik partnered with VoltH2 to advance green hydrogen production at the Delfzijl chemical park in the Netherlands. This collaboration will see the construction of a 50 MW electrolyzer, which is anticipated to meet a significant portion

of Evonik's hydrogen demand by the end of 2027. This facility is set to be the first industrial-scale green hydrogen water electrolysis plant in the North Netherlands.

Moreover, in 2023, Ayesa secured a project from Acuaes, under the Spanish Ministry for Ecological Transition, to develop new wastewater treatment plants in Caceres and Palma de Mallorca. Similarly, HOFOR collaborated with NCC to construct an upgraded water treatment plant in Zealand, Denmark. These developments in the oil and gas, as well as water and wastewater management sectors, are expected to further drive the demand for pipe relining services in Europe.

Strategic Insights

Market Segmentation Analysis

The Europe Pipe Relining Market is segmented by various criteria:

By Solution: The market is divided into Product and Service segments, with Services holding the largest market share in 2024.

By Products: This includes CIPP Equipment, Liner, High Pressure Water Jetters, Inversion Drum, Pulling Machine, and Others, where CIPP Equipment dominated the market in 2024.

By Services: The services are categorized into Cured-in-place Pipe, Pull-in-place, Pipe Bursting, and Internal Pipe Coating, with Cured-in-place Pipe leading the market.

By Cured-in-place Pipe: This segment is further divided into Patch or Spot Repair and Liner or Longer Repair, with the latter holding the largest share.

By Curing Method: The methods include Ambient Cure, Hot Water Cure, Steam Cure, and UV Light Cure, where Hot Water Cure was the most prevalent in 2024.

By End-user: The market is segmented into Oil and Gas, Chemicals, Municipal, and Others, with Oil and Gas being the largest segment.

Market Outlook

Aging water infrastructure poses significant challenges for many developed economies, particularly in Europe, where urbanization and population growth are increasing the demand for pipeline restoration. Many European cities are among the oldest globally, leading to concerns about deteriorating infrastructure and the need for accessible water facilities. The condition of underground water systems, sewage maintenance, and clean water supply are often overlooked financially, putting municipalities at risk.

For instance, a June 2024 EU-funded project aims to replace the aging Nicosia “Trunk E” sewer network in Cyprus, which was built in 1986 with asbestos-cement pipes. The project highlights the urgent need for modernizing hazardous pipelines to improve public health and safety, aligning with Sustainable Development Goal 6 on clean water and sanitation.

As countries invest in trenchless technology, pipe relining emerges as a cost-effective and minimally disruptive solution for restoring pipelines. This method is increasingly favored for its ability to reduce public disturbances during repairs.

Country Insights

The market is further segmented by country, with Germany holding the largest share in 2024. The German government is actively promoting the hydrogen economy, with plans to complete the first 525 kilometers of a national hydrogen pipeline by 2025, supported by private investments. By 2032, this pipeline is expected to expand to 9,040 kilometers, connecting key hydrogen hubs across the country. This investment in green hydrogen production is anticipated to create lucrative opportunities for pipe relining market players in the coming years.

Company Profiles

Key players in the Europe Pipe Relining Market include Roto-Rooter Group Inc, Silverlining Holding Corp, Aegion Corp, RPB Inc, Pipe Restoration Solutions Inc, The Charles Machine Works Inc, Sekisui Chemical Co Ltd, Waterline Renewal Technologies Inc, NuFlow Technologies Inc, Brawo Systems GmbH, Advanced Trenchless Solutions LLC, Picote GROUP, Atlantic Pipe Services, Roddie Inc., TRIC Tools, Inc., and PURIS Corp. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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