

Europe Trenchless Pipe Relining Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Method (Cured in Place Pipe, Pull-in-Place, Pipe Bursting, and Internal Pipe Coating), End-user (Municipal, Industrial, Commercial, and Residential), Diameter (Below DN 50, DN 51 - DN 150, DN 151 - DN 250, and Above DN 251), and Curing Method (Ambient Cure, Hot Water Cure, Steam Cure, and UV Light Cure)

<https://marketpublishers.com/r/EBD8E973388EEN.html>

Date: March 2026

Pages: 171

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

ID: EBD8E973388EEN

Abstracts

The Europe trenchless pipe relining market is projected to grow significantly, reaching an estimated US\$ 1,115.4 million by 2031, up from US\$ 696.2 million in 2024, with a compound annual growth rate (CAGR) of 7.1% anticipated from 2025 to 2031. This growth is driven by the increasing need for infrastructure modernization and the adoption of trenchless technology across various European countries.

The market is divided into several key regions, including Germany, France, Spain, the UK, Italy, and the Rest of Europe. Europe's water infrastructure, which encompasses pumps, treatment plants, and an extensive network of pipes, is primarily managed by both public and private utilities. A significant portion of this infrastructure, approximately 7 million kilometers of pipes, has been in operation for over a century. The aging infrastructure presents numerous challenges, including rising urbanization, population growth, and the impacts of climate change. In response, the European Commission reported that government authorities invested nearly US\$ 50.4 billion in 2024 to modernize water infrastructure, aiming to mitigate damage costs and protect environmental health. Aging pipelines can compromise water quality and sanitation services, leading to untreated sewage discharges into waterways. Trenchless pipe

relining solutions are crucial for repairing these damages and reducing overall costs.

As trenchless technology gains traction, market players are expanding their operations in Europe. For instance, in October 2022, Trelleborg Group, a German manufacturer specializing in machinery and liners for trenchless repairs, announced its acquisition of Innovative Sewer Technologies (IST), thereby enhancing its presence in the European pipe repair market.

The Europe trenchless pipe relining market can be segmented by method, end-user, diameter, and curing method. By method, the market includes Cured in Place Pipe (CIPP), Pull-in-Place, Pipe Bursting, and Internal Pipe Coating, with CIPP being the dominant method in 2024. In terms of end-users, the municipal segment led the market, reflecting the significant demand from public utilities. The diameter segmentation shows that pipes below DN 50 were the most prevalent in 2024, while the Hot Water Cure method was the leading curing technique.

Leakage from pipelines poses serious environmental and economic risks. Although pipelines are designed for durability, leaks can occur over time, necessitating effective maintenance strategies. Governments across Europe have implemented stringent regulations to ensure the integrity of pipeline networks. For example, UK water companies have committed to a 50% reduction in leakage by 2050, based on 2017-2018 levels. Additionally, EU regulation 2020/741, effective since June 2023, mandates member states to adhere to strict standards for managing risks associated with reclaimed water, including monitoring quality and preventing leakage during transport and distribution. These regulations facilitate prompt repairs of municipal water infrastructure and impose penalties for non-compliance, further emphasizing the need for trenchless technology as a cost-effective and non-disruptive alternative to traditional repair methods.

Country-wise, Germany holds the largest share of the trenchless pipe relining market in Europe as of 2024. The demand for clean drinking water drives the need for regular maintenance and repair of pipelines in the country. Germany is home to numerous pipeline relining companies, which enhances awareness and investment in trenchless technologies. The country operates 3,796 wastewater treatment plants, underscoring its commitment to effective water management. The German government is also focused on strengthening water treatment infrastructure and enforcing environmental regulations, which fuels investment in trenchless technologies. Recent financing agreements involving the EU, Germany, and Kosovo aim to enhance wastewater treatment and solid waste management, creating opportunities for German companies in the water treatment sector.

Key players in the Europe trenchless pipe relining market include The Charles Machine Works Inc, Trelleborg AB, RelineEurope GmbH, and several others. These companies

are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to customers. The increasing adoption of trenchless technology, coupled with regulatory pressures and the need for infrastructure upgrades, positions the Europe trenchless pipe relining market for robust growth in the coming years.

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