

## **Global Water Blasting Machine Market Research Report 2025-2030**

Market Report | 2025-11-12 | 175 pages | Arizton Advisory & Intelligence

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### **Report description:**

The global water blasting machine market is expected to grow at a CAGR of 5.33% from 2024 to 2030.

### **IMPACT OF US & CHINA TRADE WAR**

The US-China trade war escalation in January 2025 increased tariffs and trade frictions that significantly impacted the global Water Blasting Machine market. It raised procurement costs for OEMs, systems integrators, and end users dependent on Chinese and Taiwanese suppliers. Higher duties on imports of high-pressure pumps, intensifier units, stainless steel manifolds, precision nozzles, valves, electric motors, and industrial PLC controllers pushed manufacturers to shift sourcing toward Southeast Asia and Latin America. These adjustments created shipment delays and capacity bottlenecks.

Delivery schedules for industrial cleaning, shipyard and marine maintenance, oil and gas decommissioning, and municipal infrastructure projects were disrupted across major US and international markets. Supply chain adjustments struggled to meet demand expectations in 2025. US tariffs on Indian exports raised in August 2025 affected high-pressure hoses, crimped fittings, custom flanges, and protective metal enclosures used in blasting systems. Suppliers either absorbed rising costs or shifted procurement to other regions.

Aftermarket dependent operators encountered constrained spare parts availability that increased downtime risks for critical industrial and marine operations. Inventory planning grew more complex as sourcing strategies fragmented across multiple global supply bases. Overall, the Water Blasting Machine market in 2025 faces elevated input costs and shifting supply chain dependencies. These pressures are reshaping pricing strategies, procurement cycles, and maintenance planning while limiting global availability of professional-grade equipment.

### **WATER BLASTING MACHINES MARKET TRENDS & ENABLERS**

- Industries are shifting from chemical-based cleaning to water-powered blasting systems that eliminate hazardous solvents. This trend is strengthening adoption in oil and gas, shipyards, and infrastructure, where sustainability and worker safety are prioritized.
- The development of compact, eco-friendly water blasting systems with integrated recycling units is growing. These technologies

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allow operators to conserve freshwater, reduce wastewater discharge, and comply with stricter environmental standards across global industrial sites.

-□Regulatory pressure is accelerating the adoption of green cleaning methods as agencies promote safer industrial practices. Water blasting meets emerging mandates on emission-free cleaning and aligns with government-led sustainability goals in construction, energy, and marine industries.

-□Recurring maintenance needs in critical infrastructure, such as pipelines, power plants, and municipal water systems, are fueling demand. Water blasting machines are valued for their efficiency in extending asset life while ensuring consistent operational reliability.

## INDUSTRY RESTRAINTS

High upfront investment and lifecycle costs limit the adoption of water blasting machines among small operators and price-sensitive industries. Expenses for high-pressure pumps, replacement parts, and routine servicing discourage widespread deployment despite proven performance benefits.

A shortage of skilled operators and limited training infrastructure in developing economies restrains market penetration.

Inadequate awareness of safe handling practices and low exposure to advanced systems often result in underutilization and a higher risk of operational downtime.

## WATER BLASTING MACHINES MARKET SEGMENTATION INSIGHTS

### INSIGHT BY DRIVE MECHANISM

The global water blasting machine market by drive mechanism is segregated into diesel-powered, electric-powered, hydraulic-powered, and pneumatic-powered. The diesel-powered segment accounted for the largest market share of around 46%. They work best in heavy-duty field applications like oilfields, pipelines, shipyards, and construction sites. These locations often have limited access to the power grid. Therefore, mobility, high torque, and durability are crucial for ultra-high-pressure cleaning. In North America and the Asia-Pacific, diesel water blasters are the most popular choice due to strong infrastructure and equipment needs. Companies such as WOMA, Jetstream and Karcher offer dependable units that can be used up to 40,000 psi, and they can be set up in portable as well as stationary designs.

Diesel drives may see reduced use in urban zones due to emission rules, but remain dominant in remote or emerging markets where support systems are sparse and engine-driven power offers unmatched operational flexibility.

-□Segmentation by Drive Mechanism

o□Diesel-Powered

o□Electric-Powered

o□Hydraulic Powered

o□Pneumatic Powered

### INSIGHT BY PRESSURE RANGE

Based on the pressure range, the low-pressure range segment held the largest global water blasting machine market in 2024.

These machines are frequently used in sanitation, municipal, and food processing industries where soft surface integrity is crucial and chemical-free cleaning is preferred for regulatory or environmental reasons.

The fan jet and rotating nozzles are found to be popular in this category. They provide wide surface coverage without damaging paint or sensitive materials, making them suitable for cleaning fleets or sanitizing surfaces. These systems are widely used across Asia and other developing regions, where maintaining essential public and industrial facilities is a priority. They make up around 25% of the global market's total revenue.

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Low-pressure battery-electric and hybrid-powered models are beginning to emerge in response to growing sustainability demands. These models are especially useful in indoor spaces or places with emission limits, supporting goals for decarbonization and water reuse in urban cleaning.

- [ ] Segmentation by Pressure Range

- o [ ] Low Pressure
- o [ ] Medium Pressure
- o [ ] High Pressure
- o [ ] Ultra-High Pressure

INSIGHT BY END USER

By end user, the municipal and public infrastructure applications are projected to record the highest CAGR of 6.80% during the forecast period. Growing investment in wastewater facilities, pipelines, and public utilities drives adoption, with water blasting used for descaling, pipe cleaning, and surface rehabilitation across expanding urban projects. The most frequent applications are regular cleaning of sewers, cleaning of storm drains following heavy rain, cleaning of clarifier tanks, and examination of pipeline surfaces before lining with trenchless methods. These tasks are usually performed by municipal crews or contractors using long hose runs or accessing confined spaces.

Additionally, demand is increasing due to ageing sewer infrastructure in Western markets, new network expansion in Asia and Latin America, and regulatory pressures from initiatives like the U.S. Infrastructure Investment and Jobs Act, which supports system upgrades.

- [ ] Segmentation by End User

- o [ ] Oil & Gas
- o [ ] Municipal & Public Infrastructure
- o [ ] Manufacturing & Industrial
- o [ ] Construction & Infrastructure
- o [ ] Shipbuilding & Marine
- o [ ] Power Generation
- o [ ] Others

INSIGHT BY TYPE

The global water blasting machine market by type is categorized into portable and stationary. The portable segment accounts for the largest market share. Their demand is reinforced by flexibility in shipyards, construction zones, and municipal projects where equipment mobility is critical for varied worksites. Compact, eco-friendly designs further strengthen portable adoption in emerging markets.

They are used in construction, marine, oil and gas, and wastewater sectors where on-site cleaning is essential. Applications include bridge rust removal, ship hull stripping, confined tank cleaning, and pavement marking removal, unsuitable for stationary systems. Adoption is strongest among contractors, SMEs, and public agencies that need flexible equipment for varied maintenance jobs. Large industrial operators also use portable units as supplementary tools where permanent installations are impractical.

Demand is rising with framework expansion, offshore maintenance, and stricter cleaning regulations that favor water over chemicals. Electric-driven portable units are increasingly promoted to reduce emissions and noise in regulated markets.

- [ ] Segmentation by Type

- o [ ] Portable

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o Stationary

## WATER BLASTING MACHINES MARKET GEOGRAPHICAL ANALYSIS

In 2024, APAC dominated and emerged as the fastest-growing region in the global water blasting machine market with a CAGR of 6.76%. China and India, which together account for more than half of regional revenues, are supported by strong infrastructure investment, shipbuilding, and heavy industrial cleaning needs.

China's dominance is reinforced by large-scale petrochemical facilities, rapid shipyard modernization, and government-backed industrial safety mandates. India adds to the momentum with rising demand in municipal water systems, refinery maintenance, and expanding construction sectors that increasingly shift toward water-based cleaning methods.

Within APAC, Vietnam recorded the second-highest growth rate. This reflects rapid industrialization, expanding manufacturing clusters, and port infrastructure upgrades, where the adoption of compact and eco-friendly water blasting systems is accelerating faster than in other Southeast Asian economies.

Europe accounted for the share around 18% of the global water blasting machine in 2024, showing steady growth. Demand is reinforced by strict EU environmental standards that encourage the replacement of chemical cleaning methods with sustainable water-based blasting technologies across energy, transportation, and marine applications.

Within Europe, Poland registered the highest CAGR, supported by growth in industrial manufacturing, power generation facilities, and pipeline maintenance projects. Rising EU funding for modernization of Central and Eastern European infrastructure is also boosting the uptake of water blasting machines in the country.

### Segmentation by Geography

- APAC

o China

o India

o Japan

o South Korea

o Australia

o Indonesia

o Thailand

o Vietnam

o Malaysia

- North America

o US

o Canada

- Europe

o Germany

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## WATER BLASTING MACHINES MARKET VENDOR LANDSCAPE

The global water blasting machine market is driven by the demand for industrial cleaning in sectors like oil and gas, shipbuilding, and infrastructure. Applications include hydro-demolition, surface preparation, and pipe descaling. This drives manufacturers to create more powerful and automated systems.

Global OEMs own the high-end applications, and regional players are gaining traction by offering price-competitive, modular units with locally supported servicing. The market remains highly fragmented, with players competing through technical customization, portability, and after-sales support.

Large companies such as the Interpump Group, Karcher (WOMA) and Flow International take the lead with high-pressure and ultra-high-pressure (UHP) systems. These systems are used for ship hull cleaning, hydro-demolition, and industrial degreasing, backed by strong international distribution and in-house component manufacturing.

StoneAge Inc. and Federal Signal (Jetstream) specialize in highly engineered nozzles, rotating tooling and remotely operated jetting tools which provide accurate cleaning of pipes and heat exchange units in refineries, chemical plants and food processing plants.

Manufacturers like PressureJet Systems, PSI Pressure Systems, and Watex Tech are emerging in Asia and the Middle East. They provide compact, trailer-mounted water blasting systems with adjustable psi settings. These systems are commonly used in public works and infrastructure maintenance.

Niche manufacturers such as Lynx Pressure System, Aquajet, and Eagle Pressure System offer configurable UHP units for boiler descaling, robotic hydro-demolition, and tank cleaning. These units are powered by diesel or electric drives and include safety-oriented design features.

### Recent Developments in the Water Blasting Machine Market

- In April 2025, at Bauma 2025, Hammelmann launched its xPro safety module for manual high-pressure blasting guns (up to 3,200 bar), as well as debuted the Aquajet 140 diesel unit, HDP 474 pump, and Masterjet rotor jets, enhancing both safety and efficiency in industrial water blasting operations.
- On 8 April 2025, Karcher expanded its Eco Booster nozzle line to include entry-level K 2 and K 3 pressure washers, bringing high-efficiency cleaning to its more accessible models.
- In April 2025, Hammelmann entered a strategic partnership with Zhoushan Xinya Shipyard, signing a procurement order for nearly 100 ultra-high-pressure water-jet systems and ship-cleaning equipment (pumps, DOCKBOYS, DOCKMATES) to replace traditional sandblasting in maritime surface preparation.
- In March 2025, Hammelmann expanded its rental fleet in Germany with mobile high-pressure water blasting units, including Aquajet, Thermojet, and HDP 500 systems for industrial cleaning applications.
- In April 2024, NLB Corp. opened a new branch in Monroe, North Carolina, expanding its high-pressure water jetting services including pumps, accessories, sales, rentals, and maintenance for industrial cleaning and surface preparation.

### Key Company Profile

- Interpump Group S.P.A.
- Karcher
- Flow International Corporation

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- Federal Signal Corporation
- Stoneage Tools
- INC.
- CESCO
- OMAX Corporation
- Watex Tech Co., Ltd

#### Other Prominent Company Profiles

- Combijet
- Lynx Pressure System Pvt. Ltd.
- Aqua Energy International Ltd
- Hydro Engineering, Inc.
- Eagle Pressure Systems
- Aquajet Systems AB
- PressureJet
- PSI Pressure Systems Corp.
- Africatuff
- Under Pressure Systems, LLC
- Boatman Industries
- Greener Blast Technologies
- Vapor Honing Technologies
- Hako GmbH
- Clemco Industries
- Magna Jetting Systems
- Ren Jetting Systems LLP
- Airblast Eurospray

#### KEY QUESTIONS ANSWERED:

- 1.□How big is the global water blasting machine market?
- 2.□What are the key trends in the global water blasting machine market?
- 3.□What is the growth rate of the global water blasting machine market?
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- o Hydraulic Powered

- o Pneumatic Powered

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- o Low Pressure

- o Medium Pressure

- o High Pressure

- o Ultra-High Pressure

### - End User (Market Size & Forecast: 2021-2030)

- o Oil & Gas

- o Municipal & Public Infrastructure

- o Manufacturing & Industrial

- o Construction & Infrastructure

- o Shipbuilding & Marine

- o Power Generation

- o Others

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- o Portable

- o Stationary

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### - APAC

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- o Germany
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