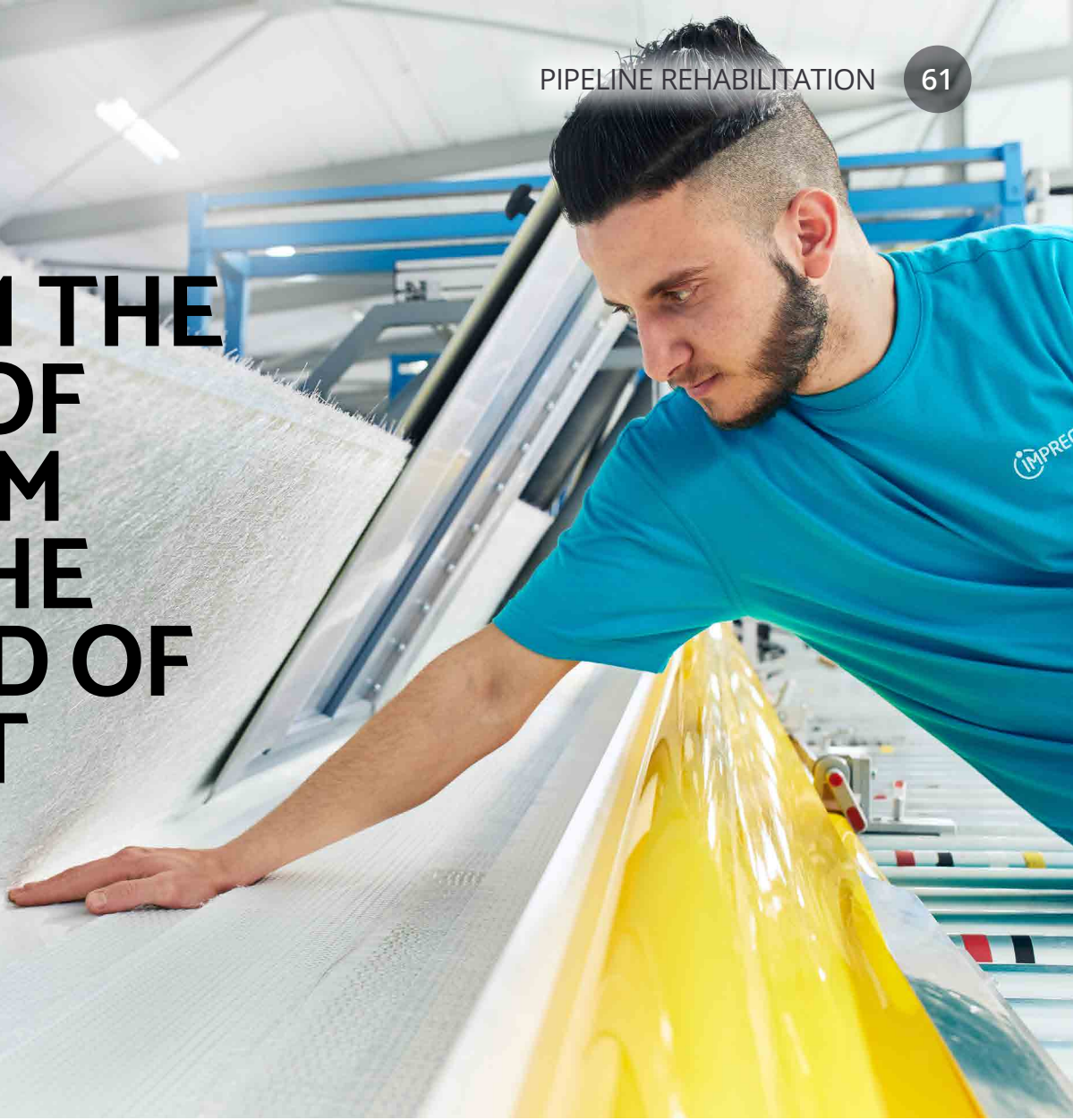


# FROM THE AGE OF STEAM TO THE SPEED OF LIGHT



IMPREG CIPP Liner  
production Germany.

Whilst the title of this article may appear to be a potted 250+ year history of the Industrial Revolution to the modern day, it is not. This is because the description mirrors the development of what is now one of the most world-renowned and leading CIPP liner manufacturing companies for trenchless sewer repair solutions using UV-curing technology, IMPREG GmbH.

Established in 1999, IMPREG, for those who may not be aware, started life as a developer and manufacturer of steam cure lining systems from its headquarters in Ammerbuch, Germany. However, watching the market for UV liners developing in both Germany and Scandinavia it became obvious that this was the lining option for the future being safer, faster and, handled correctly, more cost-effective and ultimately greener than other lining options. However, given that the 'Green' arguments were yet to take hold fully this was something that was to come over time.

So, by 2002, IMPREG's move away from its original main market of steam cure liners to the 'new' UV cure market was complete with investment in the development of its own UV based systems. At this time the company boasted just 10 employees. >

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Quality control forms a vital part of liner production at IMPREG.

Just 3 years later, in 2005, IMPREG made its first major inroads into the UV market with a project carried out in Poland which, with EU funding backing, required the installation of a 1,200 mm diameter UV cured liner along with some steam cured liners which the company was also still able to provide.

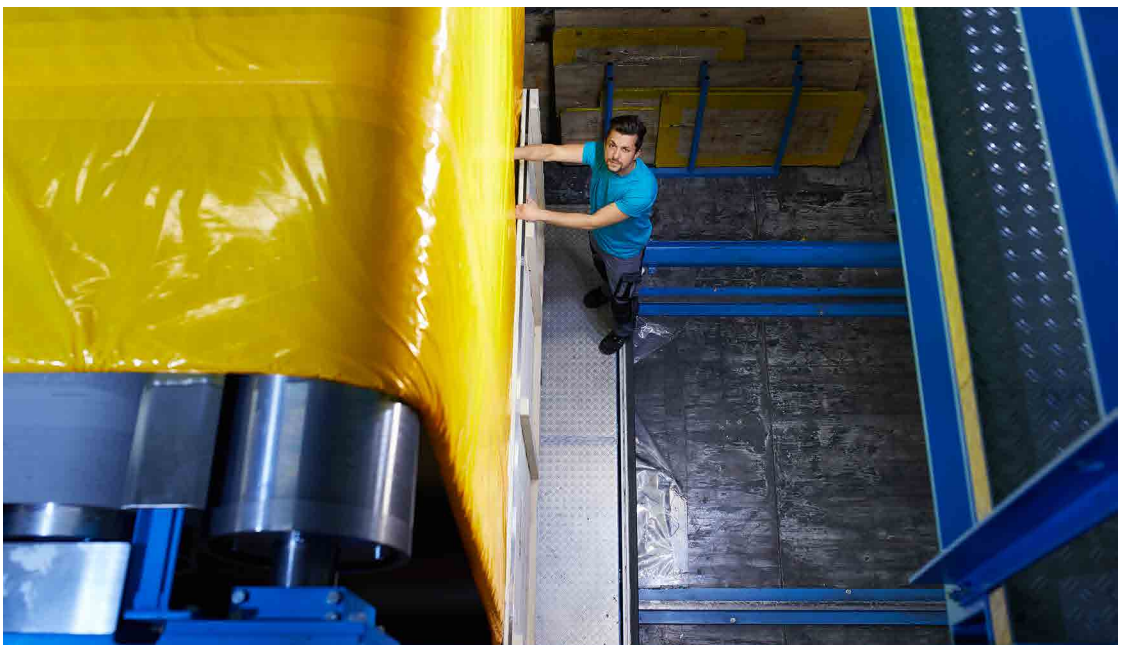
At this time also IMPREG was working with some of the larger contracting companies with a view to creating UV cure liner with extended pot-life and other requirements that clients were seeking.

#### MARKET GROWTH

From that time forward IMPREG has not looked back. From 2005 through to 2015 the company has enjoyed on average between 15% and 20% growth year-on-year, with a European market share of around 20% to 25%.

However, with the range of competitors in the European arena limiting the potential for growth, IMPREG then look at where in the world its UV cure might find significant new market share. So, in 2016 the company made its first move outside of its European market with establishment of operation in Asia with the development of a production facility in China. This facility reached full capacity in 2018. >

Monitoring liner production in February 2022.



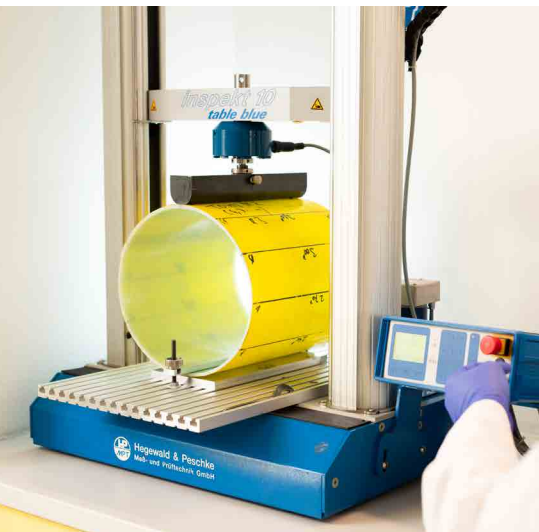
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Close inspection of the liner as it finished production completes the production control process.



Testing the liner ensures quality.

With success of the Asia operation IMPREG then turned its eyes toward North America and built a new production facility in Richmond, Virginia, which was fully operational by 2019.

What perhaps makes this global expansion truly remarkable is that it has been completed without recourse to local partnerships or any of the other more usual local tie-ups that the industry has seen over the years. According to Robert Papp, IMPREG executive Director: "The success of our expansion can be put down to the expertise of our highly knowledgeable sales team which has over the years since our establishment generated excellent contacts in all parts of the world. Without these people on our team, we would have had some difficulty in establishing ourselves as an independent operator in most markets. They should be congratulated on their efforts."

Today IMPREG has developed a significant global market share in the UV cure sector, with some 25% in Europe and the Middle East, 40% in Asia with some 85% of this being China-based and some 15% being Australasia-based. The African market is currently served from Germany, but with only small amounts of work being undertaken across the region this is a future market to develop in the long run.

North America is something of a different story. This is largely due to the fact the UV-cure liners are still somewhat in their infancy in the region, this totalling just 5% to 10% of the total rehabilitation market. However, with the establishment of the Richmond facility, IMPREG now believes it holds some 40% of the UV market in the region. With the use of UV curing becoming more popular however, there are plans to establish a West Coast facility with a second US production plant within the next 4 years or so.

#### LOCAL SUPPLY

Whilst IMPREG has established and planned production facilities around the world, over recent years one aspect of the industry that has become obvious to the company management team is the need for fast and efficient local supply of ready-impregnated liners. >

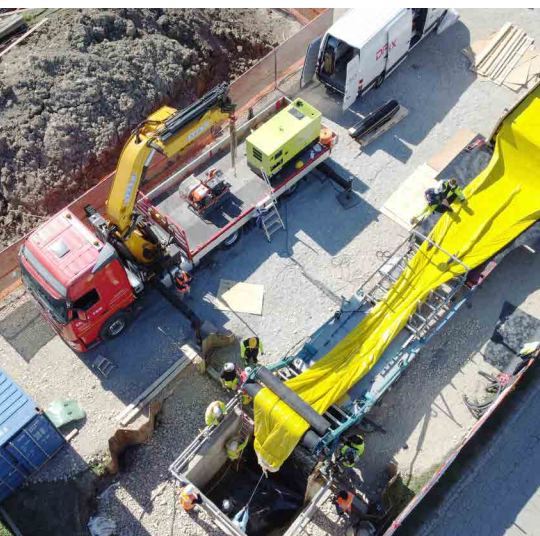
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IMPREG liner being installed on various sites.



In many parts of the world rehabilitation projects are often required at relatively short notice, with contractors often not gaining access the pipeline requiring repair until quite late in the process. This often means that pipe sizes, lengths and conditions related to just how liner-friendly a site might be are not understood very early on. This can lead to significant time lag between understanding the needs of the project and delivery of the required liner, if it has to be ordered direct from the factory, made, shipped and delivered to site.

So, to support this market anomaly, IMPREG has developed its concept of local warehouses. To date warehouses, which hold a range of pre-impregnated UV cure liners in the most popular size ranges across the market, have been established in Australia, the UK and California (ahead of the new production plant to serve the US West Coast region).

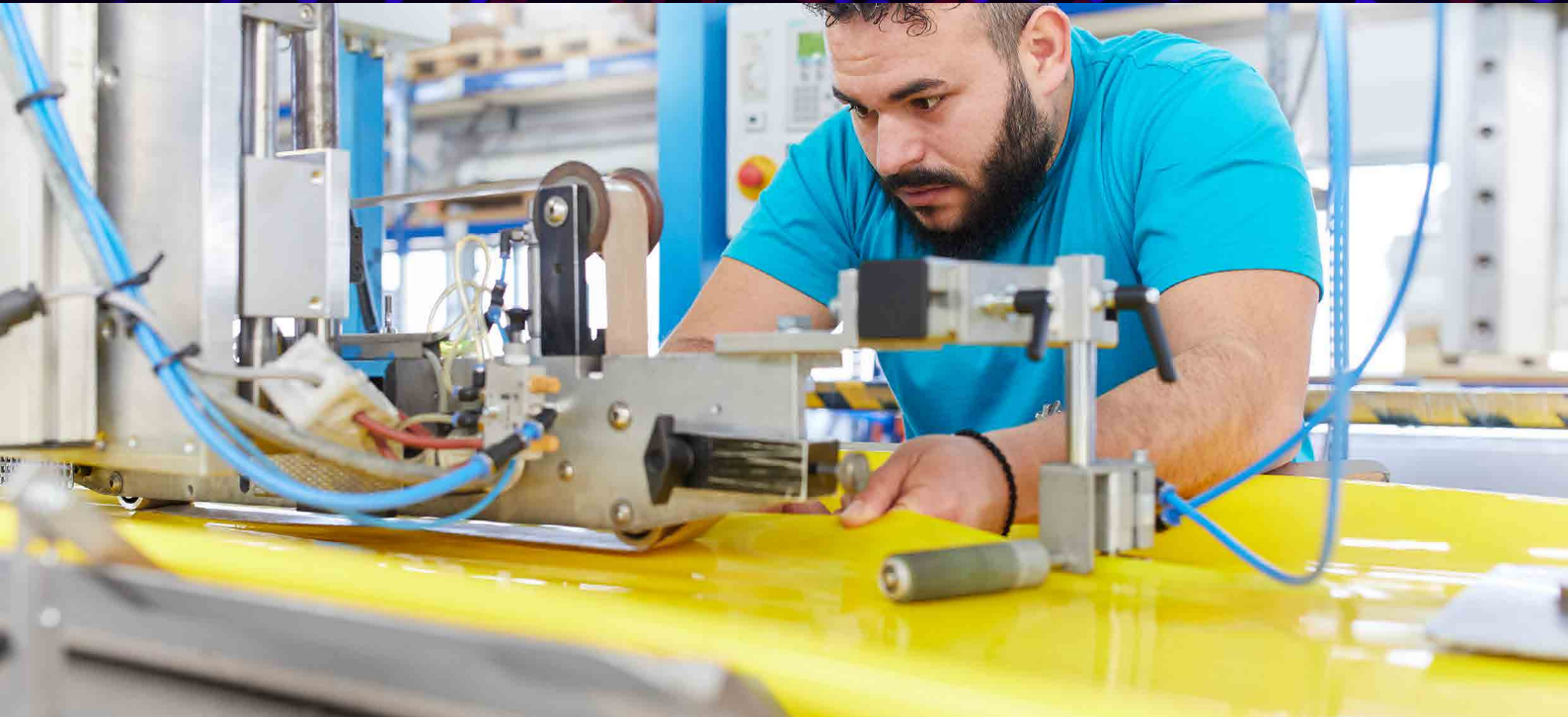
Jack Talbott, Technical Sales manager for IMPREG's UK operations highlighted the advantages of such a warehouse system saying: "The warehouse system with the range of liners available 'off-the-shelf' means that we can meet the needs of what has become a very reactive market place. Being able to place a short-order for liners and get fast delivery in situations where a long lag time for delivery direct from a production facility, be it here in the UK or anywhere else in the world, would mean delays on other project operations or even the collapse of a degraded sewer that simply could not wait, means that contractors, large and small, can work more effectively."

Jack went on to say: "Having been an IMPREG customer for over 15 years as a contractor, I and others like me in our global warehouse operations are in a position to offer existing and new liner installers our expertise and product knowledge in a way that gives us a special advantage. We can advise from day one on what will be the most efficient cost-effective and environmentally-friendly product for any particular situation and we bring with us the flexibility to adapt our advice wherever and whenever necessary given the fact that we are familiar with local conditions and potential obstacles from our own range of experiences in the field." >

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Precision work  
on the liner in  
production.

Since the establishment of the UK warehouse for example, IMPREG has seen a significant increase in enquiries from clients previously unfamiliar with the available product range. Katrin Letzgus-Danhach, IMPREG Head of Sales for the EMEA region said: "The up-turn in enquiries after establishment of our warehouses has more than justified our investment in this type of facility and allows us to offer significant flexibility within the markets they serve."

IMPREG planned to celebrate its 20th anniversary recently, but the Covid crisis meant this was not possible. So, with the company now close to celebrating its 25th year of trading and with this in mind and with the future squarely in its sights, the company has recently indicated that, whilst it continues to look at and invest in developments for its products in the larger diameter lining market, with so far DN2000 being its largest liner installed in Italy in March 2021, it is also now looking at the smaller diameter options. IMPREG is looking at how it can meet the needs of and UV cure product availability for the smaller contractor community. However, the company is saying little more than this at present – so watch this space for future developments.

IMPREG liner  
onsite during  
installation.



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