

# Global Underground Services Locators Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Underground Services Locators market size is expected to reach \$ 212 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

In 2025, global Underground Services Locator production reached approximately 84.23 K Units, with an average global market price of around 1832 USD per Unit.

A Underground Services Locator is a field instrument used to detect and trace the route (and often estimate the depth) of buried utilities such as electrical cables, telecom lines, and metallic or tracer-wire-equipped pipes. Most commonly, it works by electromagnetic locating: a transmitter applies a signal to a conductive utility (direct connection, clamp, or induction), and a handheld receiver detects the resulting electromagnetic field to follow the line.

The upstream raw materials for Underground Services Locators mainly include high-precision magnetic sensors, signal processing chips, RF and antenna modules, batteries, and displays. Typical raw material suppliers include PNI Sensor, Bartington, Murata, TI, ADI, ST, and NXP.

The single-line production capacity of Underground Services Locators varies greatly depending on product positioning and type, automation level, and supply chain support, typically ranging from 10,000 to 50,000 units, with a gross profit margin ranging from 25% to 40%.

A Underground Services Locator is a field tool used to find and trace buried utilities?power and telecom cables, metal pipes, and non-metallic lines that carry a tracer wire?so crews can understand what?s underground before they dig. Most systems work by applying a known signal with a transmitter and then using a handheld receiver to detect the resulting electromagnetic field, allowing users to mark the route and often estimate depth; depending on site conditions and utility types, teams may also pair these tools with sondes or ground-penetrating radar to improve coverage and

confidence.

What makes today's locators so valuable is how well they address the realities that slow projects down and create risk: congested corridors where multiple lines run close together, incomplete or outdated utility records, and the high cost—financial and safety-related—of a strike. Modern units increasingly stand out through better signal discrimination and multi-frequency capability to reduce ambiguity, clearer user guidance that helps less-experienced operators work consistently, and built-in logging or connectivity that turns “we checked” into documented, shareable evidence. In other words, they don't just help you detect a line; they help you deliver a repeatable, defensible locating workflow that reduces rework and surprises on site.

The industry tailwinds are straightforward and durable. Aging infrastructure demands constant repair and replacement, urban density pushes more work into crowded subsurface environments, and safety and liability expectations continue to rise for contractors and utility owners alike. At the same time, utilities are gradually moving toward more digital asset management, which increases the value of locator outputs that can be captured, stored, and integrated into mapping systems rather than disappearing after paint fades. Looking ahead, the market's upside is likely to come from this shift toward more integrated locating-and-documentation workflows, alongside steady improvements in performance for difficult conditions and mixed-material networks—making cable and pipe locating an increasingly indispensable part of modern construction, maintenance, and utility operations.

This report studies the global Underground Services Locators production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Underground Services Locators 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 Underground Services Locators that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Underground Services Locators total production and demand, 2021-2032, (K Units)

Global Underground Services Locators total production value, 2021-2032, (USD Million)

Global Underground Services Locators production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Underground Services Locators consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Underground Services Locators domestic production, consumption, key domestic manufacturers and share

Global Underground Services Locators production by manufacturer, production, price,

value and market share 2021-2026, (USD Million) & (K Units)

Global Underground Services Locators production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Underground Services Locators production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Underground Services Locators 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 Leica Geosystems (Hexagon), Radiodetection, 3M, RIDGID (Emerson), Sonel, Megger, TECHNO-AC, FUJI TECOM, Amprobe (Fluke), C.Scope, 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 Underground Services Locators market

**Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K 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 Underground Services Locators Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

### Global Underground Services Locators Market, Segmentation by Type:

Single Frequency Locators

Multiple Frequency Locators

### Global Underground Services Locators Market, Segmentation by Detection Depth:

Below 5m

5-10m

Above 10m

### Global Underground Services Locators Market, Segmentation by Pipeline Material:

Metal Pipe Use

Non-metal Pipe Use

### Global Underground Services Locators Market, Segmentation by Application:

Public Utilities

Construction

Other

### **Companies Profiled:**

Leica Geosystems (Hexagon)

Radiodetection

3M

RIDGID (Emerson)

Sonel

Megger

TECHNO-AC

FUJI TECOM

Amprobe (Fluke)

C.Scope

RYCOM Instruments

Vivax-Metrotech

HT Italia

SubSurface Instruments

Sewerin

GeoMax

Merytronic

Fisher Research Labs

Subsite Electronics

Hermann Sewerin GmbH

Pipehorn (Utility Tool Company)

KharkovEnergoPribor

TEMPO Communications

TNF

Ktan

Hunan Puqi Water Environment Institute

**Key Questions Answered:**

1. How big is the global Underground Services Locators market?
2. What is the demand of the global Underground Services Locators market?
3. What is the year over year growth of the global Underground Services Locators market?
4. What is the production and production value of the global Underground Services Locators market?
5. Who are the key producers in the global Underground Services Locators market?
6. What are the growth factors driving the market demand?

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