

Global Underground Utility Locating Services Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Underground Utility Locating Services market size is expected to reach \$ 598 million by 2032, rising at a market growth of 3.4% CAGR during the forecast period (2026-2032).

In 2025, global Underground Utility Locating Services market reached approximately 2.3 million hours, with an average global market price of around US\$ 200 per hour. Underground Utility Locating Services are professional services that identify, map, and mark the location of buried or subsurface utilities before excavation, construction, or maintenance work. These services are essential for preventing accidental damage to underground infrastructure, ensuring worker safety, and complying with regulations. The gross margin for Underground Utility Locating Services typically ranges from 30% to 50%, depending on factors such as the technology used (e.g., EM locators vs. GPR), project complexity, scale of operations, and regional labor costs. The Underground Utility Locating Services market has been experiencing steady growth due to increasing infrastructure development, urbanization, and stringent safety regulations aimed at preventing accidental damage to underground utilities. The industry serves a wide range of sectors, including construction, energy, telecommunications, water and wastewater management, and municipal public works. The industry value chain typically begins with service providers deploying specialized equipment such as electromagnetic locators (EM), ground-penetrating radar (GPR), acoustic detection devices, and sometimes vacuum excavation systems to detect and map buried utilities. These services may be supported by software for GIS mapping, 3D modeling, and digital recordkeeping. Upstream in the chain, manufacturers and distributors supply the locating equipment and sensors, while downstream, the services are delivered to contractors, utility companies, municipalities, and private property owners. The demand is driven by the need for safe excavation practices, government-mandated ?call-before-

you-dig? programs, rapid urban expansion, and the increasing replacement and maintenance of aging infrastructure. Key opportunities in this market include the adoption of advanced technologies such as high-resolution GPR, real-time data integration with GIS platforms, robotic or automated scanning systems, and expansion into regions with emerging construction activity. Additionally, companies offering value-added services like comprehensive subsurface utility engineering (SUE), 3D mapping, and predictive infrastructure analytics can differentiate themselves and capture higher-margin contracts. As infrastructure investment and smart city initiatives grow globally, the underground utility locating services sector presents significant opportunities for both technological innovation and service expansion.

This report studies the global Underground Utility Locating Services demand, key companies, and key regions.

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

Highlights and key features of the study

Global Underground Utility Locating Services total market, 2021-2032, (USD Million)

Global Underground Utility Locating Services total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Underground Utility Locating Services total market, key domestic companies, and share, (USD Million)

Global Underground Utility Locating Services revenue by player, revenue and market share 2021-2026, (USD Million)

Global Underground Utility Locating Services total market by Type, CAGR, 2021-2032, (USD Million)

Global Underground Utility Locating Services total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Underground Utility Locating Services market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Blood Hound, ELM Utilities, GPRS, Penhall Company, Diamond Locating Services, Dycom Industries, Inc, Northern Lights Locating, United Locating Services, AUUL, Mason Private Locating LLC, 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 Utility Locating Services market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, 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 Utility Locating Services Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Underground Utility Locating Services Market, Segmentation by Type:

Public Utility Locating Services

Private Utility Locating Services

Global Underground Utility Locating Services Market, Segmentation by Technology:

Electromagnetic (EM) Locating

Ground Penetrating Radar

Other

Global Underground Utility Locating Services Market, Segmentation by Application:

Electric

Communication

Water

Oil and Gas

Other

Companies Profiled:

Blood Hound

ELM Utilities

GPRS

Penhall Company

Diamond Locating Services

Dycom Industries, Inc

Northern Lights Locating

United Locating Services

AUUL

Mason Private Locating LLC

The Underground Detective

Dig Safe

Benchmark

Mid-Atlantic Utility Locating

Diversified Underground INC

B&B Locating, Inc.

GeoModel, Inc.

Key Questions Answered

1. How big is the global Underground Utility Locating Services market?
2. What is the demand of the global Underground Utility Locating Services market?
3. What is the year over year growth of the global Underground Utility Locating Services market?
4. What is the total value of the global Underground Utility Locating Services market?
5. Who are the Major Players in the global Underground Utility Locating Services market?
6. What are the growth factors driving the market demand?

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