

Utility Locator Market by Technique (Electromagnetic Field, GPR), Offering (Equipment and Services), Target (Metallic Utilities and Non-Metallic Utilities), Vertical (Oil & Gas, Electricity, Transportation) and Region - Global Forecast to 2027

<https://marketpublishers.com/r/U57989832DEEN.html>

Date: October 2022

Pages: 189

Price: US\$ 4,950.00 (Single User License)

ID: U57989832DEEN

Abstracts

The utility locator market is projected to grow from USD 833 million in 2022 to USD 1,109 million in 2027; it is expected to grow at a CAGR of 5.9% during the forecasted period. Introduction of standards and ease in regulations pertaining to utility locators driving the utility locator adaption; while rising demand for real-time utility locating will likely to create huge opportunity to utility location service providers.

“Market for utility locator using ground penetrating radar technique is expected to grow at highest CAGR during the forecasted period.”

The ground penetrating radar (GPR) technique can non-destructively locate objects and used to locate buried pipes, tanks, manholes, cables, and other related buried objects, which cannot be located with electromagnetic locating or other methods. The GPR can locate subsurface structures in material like soil, rock, concrete, asphalt, wood and water.

“Market for water and sewage vertical is to grow at highest CAGR during forecast period. ”

Digging without locating the underground high-pressure water mains and sewage lines may lead to injury as the jet of water from mains may include stones or other hard objects ejected from the pipe. Utility locating and mapping devices helps in tracing of right damage spot , water and sewer utility networks for meeting water pressure

requirements or reducing water-in-basement issues. GPR technique of utility locating can be used even on ice to help in locating water and sewage line, and other objects. Thus, such various benefits of utility locator in water and sewage vertical is expected to create significant demand in coming years.

“APAC to offer significant growth opportunities for utility locator market between 2022 and 2027.”

Utility market in APAC region is expected to grow at highest growth of rate as the region characterized by rapid infrastructure development initiatives and huge investment by the public and private sectors in residential, industrial, and commercial establishments. The market for utility locators in Asia pacific is expected to grow more in the water and sewage vertical.

In the process of determining and verifying the market size for several segments and subsegments gathered through secondary research, extensive primary interviews have been conducted with key industry experts in the utility locator market space. The break-up of primary participants for the report has been shown below:

By Company Type: Tier 1 – 55%, Tier 2 – 30%, and Tier 3 – 15%

By Designation: C-level Executives – 45%, Directors – 35%, and Others – 20%

By Region: North America –34%, APAC– 31%, Europe – 24%, and RoW – 12%

The report profiles key players in the utility locator market with their respective market ranking analysis. Prominent players profiled in this report are Radiodetection Ltd.(UK), Guideline Geo (Sweden), Rigid Tool Company (US), Ditch Witch (The Charles Machine works) (US), Leica Geosystems AG (US), Vivax-Metrotech Corporation (US), 3M (US), USIC LLC (US), multiVIEW Locates Inc. (Canada), and Ground Penetrating Radar (US).

Research Coverage:

This research report categorizes the utility locator market on the basis utility locating technique, offering, verticals, and region. The report describes the major drivers, restraints, challenges, and opportunities pertaining to the utility locator market and forecasts the same till 2027. Apart from these, the report also consists of leadership

mapping and analysis of all the companies included in the utility locator ecosystem.

Key Benefits of Buying the Report

The report will help market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall utility locator market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.2.1 INCLUSIONS & EXCLUSIONS

1.3 STUDY SCOPE

1.3.1 MARKETS COVERED

FIGURE 1 UTILITY LOCATOR MARKET SEGMENTATION

1.3.2 REGIONAL SCOPE

FIGURE 2 UTILITY LOCATOR MARKET: REGIONAL SEGMENTATION

1.3.3 YEARS CONSIDERED

1.4 CURRENCY CONSIDERED

1.5 LIMITATIONS

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 3 UTILITY LOCATOR MARKET: RESEARCH DESIGN

2.1.1 SECONDARY AND PRIMARY RESEARCH

2.1.2 SECONDARY DATA

2.1.2.1 List of key secondary sources

2.1.2.2 Secondary sources

2.1.3 PRIMARY DATA

2.1.3.1 Primary interviews with experts

2.1.3.2 List of key primary interview participants

2.1.3.3 Breakdown of primary interviews

2.1.3.4 Key data from primary sources

2.1.3.5 Key industry insights

2.2 MARKET SIZE ESTIMATION

2.2.1 BOTTOM-UP APPROACH

2.2.1.1 Approach for arriving at market share by bottom-up analysis (demand side)

FIGURE 4 UTILITY LOCATOR MARKET: BOTTOM-UP APPROACH

2.2.2 TOP-DOWN APPROACH

2.2.2.1 Approach for capturing market share by top-down analysis (supply side)

FIGURE 5 UTILITY LOCATOR MARKET: TOP-DOWN APPROACH

FIGURE 6 UTILITY LOCATOR MARKET: SUPPLY-SIDE ANALYSIS

2.3 MARKET BREAKDOWN & DATA TRIANGULATION

FIGURE 7 DATA TRIANGULATION

2.4 RESEARCH ASSUMPTIONS

3 EXECUTIVE SUMMARY

FIGURE 8 UTILITY LOCATOR MARKET, 2018–2027 (USD MILLION)

FIGURE 9 ELECTROMAGNETIC FIELD TECHNIQUE TO HAVE LARGEST MARKET SHARE

FIGURE 10 UTILITY LOCATOR SERVICES TO GROW AT HIGHER CAGR

FIGURE 11 TELECOMMUNICATIONS VERTICAL TO ACCOUNT FOR LARGEST MARKET SHARE

FIGURE 12 ASIA PACIFIC EXPECTED TO BE FASTEST-GROWING MARKET

4 PREMIUM INSIGHTS

4.1 ATTRACTIVE GROWTH OPPORTUNITIES IN UTILITY LOCATOR MARKET

FIGURE 13 AGING INFRASTRUCTURE MAINTENANCE NEEDS TO DRIVE MARKET

4.2 UTILITY LOCATOR MARKET, BY OFFERING

FIGURE 14 UTILITY LOCATOR EQUIPMENT TO HAVE LARGER MARKET SIZE IN 2027

4.3 UTILITY LOCATOR MARKET, BY TECHNIQUE

FIGURE 15 GPR TECHNIQUE TO GROW AT HIGHEST CAGR

4.4 UTILITY LOCATOR MARKET IN NORTH AMERICA, BY VERTICAL AND COUNTRY

FIGURE 16 TELECOMMUNICATIONS VERTICAL AND US TO ACCOUNT FOR LARGEST MARKET SHARES IN NORTH AMERICA

4.5 UTILITY LOCATOR MARKET, BY COUNTRY

FIGURE 17 US TO HAVE LARGEST SIZE OF UTILITY LOCATOR MARKET

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MARKET DYNAMICS

FIGURE 18 DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES IN UTILITY LOCATOR MARKET

5.2.1 DRIVERS

5.2.1.1 Concern for safety and protection of underground utilities

5.2.1.2 Benefits of utility locator systems over traditional technologies/methods

5.2.1.3 Introduction of standards and ease in regulations pertaining to utility locators

FIGURE 19 UTILITY LOCATOR MARKET: IMPACT ANALYSIS OF DRIVERS

5.2.2 RESTRAINTS

5.2.2.1 High cost of ownership and maintenance of utility locators

FIGURE 20 UTILITY LOCATOR MARKET: IMPACT ANALYSIS OF RESTRAINTS

5.2.3 OPPORTUNITIES

5.2.3.1 Rising demand for real-time utility locating

5.2.3.2 Growing infrastructure requires maintenance operations by utility locator

system

FIGURE 21 UTILITY LOCATOR MARKET: IMPACT ANALYSIS OF OPPORTUNITIES

5.2.4 CHALLENGES

5.2.4.1 Lack of expertise and skillset

5.2.4.2 Differed weather and soil conditions in addition to technological limitations

FIGURE 22 UTILITY LOCATOR MARKET: IMPACT ANALYSIS OF CHALLENGES

5.3 VALUE CHAIN ANALYSIS

FIGURE 23 UTILITY LOCATOR MARKET: VALUE CHAIN ANALYSIS

5.4 ECOSYSTEM ANALYSIS

FIGURE 24 UTILITY LOCATOR MARKET: ECOSYSTEM ANALYSIS

TABLE 1 UTILITY LOCATOR MARKET: ECOSYSTEM

5.5 PRICING ANALYSIS

TABLE 2 AVERAGE SELLING PRICE OF UTILITY LOCATOR SYSTEMS OFFERED
BY TOP COMPANIES, 2021

TABLE 3 INDICATIVE PRICE OF UTILITY LOCATOR SYSTEMS

5.5.1 AVERAGE SELLING PRICE OF COMPONENTS OFFERED BY KEY PLAYERS

FIGURE 25 AVERAGE SELLING PRICE OF COMPONENTS OFFERED BY KEY
PLAYERS

TABLE 4 AVERAGE SELLING PRICE OF COMPONENTS OFFERED BY KEY
PLAYERS (USD)

5.6 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS

FIGURE 26 REVENUE SHIFT AND NEW REVENUE POCKETS FOR PLAYERS IN
UTILITY LOCATOR MARKET

5.7 TECHNOLOGY ANALYSIS

5.7.1 ARTIFICIAL INTELLIGENCE

5.7.2 INTERNET OF THINGS

5.8 PORTER'S FIVE FORCES ANALYSIS

TABLE 5 UTILITY LOCATOR MARKET: PORTER'S FIVE FORCES ANALYSIS

5.9 KEY STAKEHOLDERS & BUYING CRITERIA

5.9.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 27 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP-3 VERTICALS

TABLE 6 INFLUENCE OF STAKEHOLDERS IN BUYING PROCESS FOR TOP-3 VERTICALS (%)

5.9.2 BUYING CRITERIA

FIGURE 28 KEY BUYING CRITERIA FOR TOP-3 VERTICALS

TABLE 7 KEY BUYING CRITERIA FOR TOP-3 VERTICALS

5.10 CASE STUDIES

TABLE 8 MULTIVIEW USED GPR SYSTEM TO INVESTIGATE ROAD STRUCTURE OVER SEVERAL KILOMETERS IN ONTARIO

TABLE 9 GUIDELINE GEO USED GPR IMAGING OF WESTERN WALL, JERUSALEM, ISRAEL

TABLE 10 GPR SLICE SOFTWARE HELPED ANALYZE DATA FROM GPR

TABLE 11 WHEEL-MOUNTED SEEKER SPR ALLOWED ANALYSIS OF SUBSURFACE ROCK ON TRENCH LINES

TABLE 12 C-THRU GPR USED TO IDENTIFY METAL ELEMENTS IN STRUCTURAL ELEMENTS

5.11 TRADE ANALYSIS

FIGURE 29 IMPORT DATA, BY COUNTRY, 2017–2021 (USD MILLION)

FIGURE 30 EXPORT DATA, BY COUNTRY, 2017–2021 (USD MILLION)

5.12 PATENT ANALYSIS

FIGURE 31 TOP 10 COMPANIES WITH HIGHEST NUMBER OF PATENT APPLICATIONS FROM 2012 TO 2022

TABLE 13 TOP 20 PATENT OWNERS FROM 2021 TO 2022

FIGURE 32 NUMBER OF PATENTS GRANTED PER YEAR FROM 2012 TO 2021

TABLE 14 LIST OF A FEW PATENTS IN UTILITY LOCATOR MARKET, 2020–2021

5.13 KEY CONFERENCES & EVENTS, 2022–2023

TABLE 15 UTILITY LOCATOR MARKET: DETAILED LIST OF CONFERENCES & EVENTS

5.14 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 16 NORTH AMERICA: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 17 EUROPE: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 18 ASIA PACIFIC: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 19 ROW: LIST OF REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

5.14.1 STANDARDS

TABLE 20 STANDARDS FOR UTILITY LOCATOR MARKET

6 UTILITY LOCATOR MARKET, BY TECHNIQUE

6.1 INTRODUCTION

FIGURE 33 ELECTROMAGNETIC FIELD-BASED UTILITY LOCATOR TO HAVE LARGEST MARKET SHARE

TABLE 21 UTILITY LOCATOR MARKET, BY TECHNIQUE, 2018–2021 (USD MILLION)

TABLE 22 UTILITY LOCATOR MARKET, BY TECHNIQUE, 2022–2027 (USD MILLION)

6.2 ELECTROMAGNETIC FIELD

6.2.1 INCREASED USE OF ELECTROMAGNETIC RADIATION TO LOCATE UNDERGROUND UTILITIES

TABLE 23 UTILITY LOCATOR MARKET FOR ELECTROMAGNETIC FIELD, BY OFFERING, 2018–2021 (USD MILLION)

TABLE 24 UTILITY LOCATOR MARKET FOR ELECTROMAGNETIC FIELD TECHNIQUE, BY OFFERING, 2022–2027 (USD MILLION)

TABLE 25 UTILITY LOCATOR MARKET FOR ELECTROMAGNETIC FIELD, BY VERTICAL, 2018–2021 (USD MILLION)

TABLE 26 UTILITY LOCATOR MARKET FOR ELECTROMAGNETIC FIELD TECHNIQUE, BY VERTICAL, 2022–2027 (USD MILLION)

TABLE 27 UTILITY LOCATOR MARKET FOR ELECTROMAGNETIC FIELD TECHNIQUE, BY REGION, 2018–2021 (USD MILLION)

TABLE 28 UTILITY LOCATOR MARKET FOR ELECTROMAGNETIC FIELD TECHNIQUE, BY REGION, 2022–2027(USD MILLION)

6.3 GROUND PENETRATING RADAR (GPR)

6.3.1 RISE IN USE OF GPR IN UTILITY LOCATOR TO LOCATE BURIED PIPES, CABLES, AND OTHER RELATED BURIED OBJECTS

TABLE 29 UTILITY LOCATOR MARKET FOR GPR TECHNIQUE, BY OFFERING, 2018–2021 (USD MILLION)

TABLE 30 UTILITY LOCATOR MARKET FOR GPR TECHNIQUE, BY OFFERING, 2022–2027 (USD MILLION)

TABLE 31 UTILITY LOCATOR MARKET FOR GPR TECHNIQUE, BY VERTICAL, 2018–2021 (USD MILLION)

TABLE 32 UTILITY LOCATOR MARKET FOR GPR TECHNIQUE, BY VERTICAL, 2022–2027 (USD MILLION)

TABLE 33 UTILITY LOCATOR MARKET FOR GPR TECHNIQUE, BY REGION,

2018–2021 (USD MILLION)

TABLE 34 UTILITY LOCATOR MARKET FOR GPR TECHNIQUE, BY REGION,
2022–2027 (USD MILLION)

6.4 OTHERS

TABLE 35 UTILITY LOCATOR MARKET FOR OTHER TECHNIQUES, BY OFFERING,
2018–2021 (USD MILLION)

TABLE 36 UTILITY LOCATOR MARKET FOR OTHER TECHNIQUES, BY OFFERING,
2022–2027 (USD MILLION)

TABLE 37 UTILITY LOCATOR MARKET FOR OTHER TECHNIQUES, BY VERTICAL,
2018–2021 (USD MILLION)

TABLE 38 UTILITY LOCATOR MARKET FOR OTHER TECHNIQUES, BY VERTICAL,
2022–2027 (USD MILLION)

TABLE 39 UTILITY LOCATOR MARKET FOR OTHER TECHNIQUES, BY REGION,
2018–2021 (USD MILLION)

TABLE 40 UTILITY LOCATOR MARKET FOR OTHER TECHNIQUES, BY REGION,
2022–2027 (USD MILLION)

7 UTILITY LOCATOR MARKET, BY OFFERING

7.1 INTRODUCTION

FIGURE 34 MARKET FOR UTILITY LOCATING SERVICES TO GROW AT HIGHER
CAGR

TABLE 41 UTILITY LOCATOR MARKET, BY OFFERING 2018–2021 (USD MILLION)

TABLE 42 UTILITY LOCATOR MARKET, BY OFFERING, 2022–2027 (USD MILLION)

7.2 EQUIPMENT

7.2.1 ADVANCEMENTS IN UTILITY LOCATING EQUIPMENT TO LOCATE
UNDERGROUND UTILITIES

TABLE 43 UTILITY LOCATOR MARKET FOR EQUIPMENT, BY TECHNIQUE,
2018–2021 (USD MILLION)

TABLE 44 UTILITY LOCATOR MARKET FOR EQUIPMENT, BY TECHNIQUE,
2022–2027 (USD MILLION)

7.3 SERVICES

7.3.1 CONCERN FOR SAFETY AND PROTECTION OF UNDERGROUND UTILITIES
DRIVE DEMAND FOR UTILITY SERVICES

TABLE 45 UTILITY LOCATOR MARKET FOR SERVICE, BY TECHNIQUE, 2018–2021
(USD MILLION)

TABLE 46 UTILITY LOCATOR MARKET FOR SERVICE, BY TECHNIQUE, 2022–2027
(USD MILLION)

8 UTILITY LOCATOR MARKET, BY TARGET

8.1 INTRODUCTION

FIGURE 35 UTILITY LOCATOR MARKET FOR METALLIC UTILITIES TO HAVE LARGER SHARE

TABLE 47 UTILITY LOCATOR MARKET, BY TARGET, 2018–2021 (USD MILLION)

TABLE 48 UTILITY LOCATOR MARKET, BY TARGET, 2022–2027 (USD MILLION)

8.2 METALLIC UTILITIES

8.2.1 ELECTROMAGNETIC UTILITY SOLUTIONS ENABLE EFFECTIVE TRACING AND MARKING OF UNDERGROUND BURIED METALLIC UTILITIES

8.3 NON-METALLIC UTILITIES

8.3.1 GPR OFFERS TRACING AND IDENTIFICATION OF BURIED NON-METALLIC UTILITIES

9 UTILITY LOCATOR MARKET, BY VERTICAL

9.1 INTRODUCTION

FIGURE 36 TELECOMMUNICATIONS VERTICAL OF UTILITY LOCATOR MARKET TO HAVE LARGEST SHARE CAGR

TABLE 49 UTILITY LOCATOR MARKET, BY VERTICAL, 2018–2021 (USD MILLION)

TABLE 50 UTILITY LOCATOR MARKET, BY VERTICAL, 2022–2027 (USD MILLION)

9.2 OIL & GAS

9.2.1 UTILITY LOCATORS TRACE PIPELINES TRANSMISSION AND PINPOINT PROBLEM AREAS IN OIL & GAS INDUSTRY

TABLE 51 UTILITY LOCATOR MARKET FOR OIL & GAS, BY TECHNIQUE, 2018–2021 (USD MILLION)

TABLE 52 UTILITY LOCATOR MARKET FOR OIL & GAS, BY TECHNIQUE, 2022–2027 (USD MILLION)

TABLE 53 UTILITY LOCATOR MARKET FOR OIL & GAS, BY REGION, 2018–2021 (USD MILLION)

TABLE 54 UTILITY LOCATOR MARKET FOR OIL & GAS, BY REGION, 2022–2027 (USD MILLION)

9.3 ELECTRICITY

9.3.1 GROWING POWER DISTRIBUTION NETWORK IN DEVELOPING COUNTRIES TO CREATE GROWTH OPPORTUNITIES

TABLE 55 UTILITY LOCATOR MARKET FOR ELECTRICITY, BY TECHNIQUE, 2018–2021 (USD MILLION)

TABLE 56 UTILITY LOCATOR MARKET FOR ELECTRICITY, BY TECHNIQUE, 2022–2027 (USD MILLION)

TABLE 57 UTILITY LOCATOR MARKET FOR ELECTRICITY, BY REGION, 2018–2021
(USD MILLION)

TABLE 58 UTILITY LOCATOR MARKET FOR ELECTRICITY, BY REGION, 2022–2027
(USD MILLION)

9.4 TRANSPORTATION

9.4.1 RAPID URBANIZATION DRIVES DEMAND FOR UTILITY LOCATORS

TABLE 59 UTILITY LOCATOR MARKET FOR TRANSPORTATION, BY TECHNIQUE,
2018–2021 (USD MILLION)

TABLE 60 UTILITY LOCATOR MARKET FOR TRANSPORTATION, BY TECHNIQUE,
2022–2027 (USD MILLION)

TABLE 61 UTILITY LOCATOR MARKET FOR TRANSPORTATION, BY REGION,
2018–2021 (USD MILLION)

TABLE 62 UTILITY LOCATOR MARKET FOR TRANSPORTATION, BY REGION,
2022–2027 (USD MILLION)

9.5 WATER & SEWAGE

9.5.1 UTILITY LOCATOR ENABLES TRACING OF RIGHT DAMAGE SPOTS

TABLE 63 UTILITY LOCATOR MARKET FOR WATER & SEWAGE, BY TECHNIQUE,
2018–2021 (USD MILLION)

TABLE 64 UTILITY LOCATOR MARKET FOR WATER & SEWAGE, BY TECHNIQUE,
2022–2027 (USD MILLION)

TABLE 65 UTILITY LOCATOR MARKET FOR WATER & SEWAGE, BY REGION,
2018–2021 (USD MILLION)

TABLE 66 UTILITY LOCATOR MARKET FOR WATER & SEWAGE, BY REGION,
2022–2027 (USD MILLION)

9.6 TELECOMMUNICATIONS

9.6.1 UTILITY LOCATORS ASSURE UNINTERRUPTED OPERATION OF
COMMUNICATION CABLES

TABLE 67 UTILITY LOCATOR MARKET FOR TELECOMMUNICATIONS, BY
TECHNIQUE, 2018–2021 (USD MILLION)

TABLE 68 UTILITY LOCATOR MARKET FOR TELECOMMUNICATIONS, BY
TECHNIQUE, 2022–2027 (USD MILLION)

TABLE 69 UTILITY LOCATOR MARKET FOR TELECOMMUNICATIONS, BY
REGION, 2018–2021 (USD MILLION)

TABLE 70 UTILITY LOCATOR MARKET FOR TELECOMMUNICATIONS, BY
REGION, 2022–2027 (USD MILLION)

9.7 OTHERS

TABLE 71 UTILITY LOCATOR MARKET FOR OTHER VERTICALS, BY TECHNIQUE,
2018–2021 (USD MILLION)

TABLE 72 UTILITY LOCATOR MARKET FOR OTHER VERTICALS, BY TECHNIQUE,

2022–2027 (USD MILLION)

TABLE 73 UTILITY LOCATOR MARKET FOR OTHER VERTICALS, BY REGION,
2018–2021 (USD MILLION)

TABLE 74 UTILITY LOCATOR MARKET FOR OTHER VERTICALS, BY REGION,
2022–2027 (USD MILLION)

10 UTILITY LOCATOR MARKET, BY REGION

10.1 INTRODUCTION

FIGURE 37 UTILITY MARKET IN ASIA PACIFIC PROJECTED TO GROW AT
HIGHEST CAGR

TABLE 75 UTILITY LOCATOR MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 76 UTILITY LOCATOR MARKET, BY REGION, 2022–2027 (USD MILLION)

10.2 NORTH AMERICA

FIGURE 38 NORTH AMERICA: UTILITY LOCATOR MARKET SNAPSHOT

TABLE 77 NORTH AMERICA: UTILITY LOCATOR MARKET, BY COUNTRY,
2018–2021 (USD MILLION)

TABLE 78 NORTH AMERICA: UTILITY LOCATOR MARKET, BY COUNTRY,
2022–2027 (USD MILLION)

TABLE 79 NORTH AMERICA: UTILITY LOCATOR MARKET, BY TECHNIQUE,
2018–2021 (USD MILLION)

TABLE 80 NORTH AMERICA: UTILITY LOCATOR MARKET, BY TECHNIQUE,
2022–2027 (USD MILLION)

TABLE 81 NORTH AMERICA: UTILITY LOCATOR MARKET, BY VERTICAL,
2018–2021 (USD MILLION)

TABLE 82 NORTH AMERICA: UTILITY LOCATOR MARKET, BY VERTICAL,
2022–2027 (USD MILLION)

10.2.1 US

10.2.1.1 Rising government investments in transportation & infrastructure

10.2.2 CANADA

10.2.2.1 Growing demand for electricity distribution lines

10.2.3 MEXICO

10.2.3.1 Growing infrastructure sector to fuel utility locator market

10.3 EUROPE

FIGURE 39 EUROPE: UTILITY LOCATOR MARKET SNAPSHOT

TABLE 83 EUROPE: UTILITY LOCATOR MARKET, BY COUNTRY, 2018–2021 (USD
MILLION)

TABLE 84 EUROPE: UTILITY LOCATOR MARKET, BY COUNTRY, 2022–2027 (USD
MILLION)

TABLE 85 EUROPE: UTILITY LOCATOR MARKET, BY TECHNIQUE, 2018–2021
(USD MILLION)

TABLE 86 EUROPE: UTILITY LOCATOR MARKET, BY TECHNIQUE, 2022–2027
(USD MILLION)

TABLE 87 EUROPE: UTILITY LOCATOR MARKET, BY VERTICAL, 2018–2021 (USD
MILLION)

TABLE 88 EUROPE: UTILITY LOCATOR MARKET, BY VERTICAL, 2022–2027 (USD
MILLION)

10.3.1 UK

10.3.1.1 Improvement in transportation infrastructure

10.3.2 GERMANY

10.3.2.1 Infrastructure redevelopment projects to create market growth opportunities

10.3.3 FRANCE

10.3.3.1 High demand for utility locator solutions in infrastructure projects

10.3.4 REST OF EUROPE

10.4 ASIA PACIFIC

FIGURE 40 ASIA PACIFIC: UTILITY LOCATOR MARKET SNAPSHOT

TABLE 89 ASIA PACIFIC: UTILITY LOCATOR MARKET, BY COUNTRY, 2018–2021
(USD MILLION)

TABLE 90 ASIA PACIFIC: UTILITY LOCATOR MARKET, BY COUNTRY, 2022–2027
(USD MILLION)

TABLE 91 ASIA PACIFIC: UTILITY LOCATOR MARKET, BY TECHNIQUE, 2018–2021
(USD MILLION)

TABLE 92 ASIA PACIFIC: UTILITY LOCATOR MARKET, BY TECHNIQUE, 2022–2027
(USD MILLION)

TABLE 93 ASIA PACIFIC: UTILITY LOCATOR MARKET, BY VERTICAL, 2018–2021
(USD MILLION)

TABLE 94 ASIA PACIFIC: UTILITY LOCATOR MARKET, BY VERTICAL, 2022–2027
(USD MILLION)

10.4.1 CHINA

10.4.1.1 Increasing investments in infrastructure development to boost market

10.4.2 JAPAN

10.4.2.1 Demand for safety measures in transportation infrastructure

10.4.3 SOUTH KOREA

10.4.3.1 Growing demand for inspection systems in bridges, buildings, and tunnels

10.4.4 REST OF ASIA PACIFIC

10.5 REST OF THE WORLD (ROW)

TABLE 95 ROW: UTILITY LOCATOR MARKET, BY REGION, 2018–2021 (USD
MILLION)

TABLE 96 ROW: UTILITY LOCATOR MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 97 ROW: UTILITY LOCATOR MARKET, BY TECHNIQUE, 2018–2021 (USD MILLION)

TABLE 98 ROW: UTILITY LOCATOR MARKET, BY TECHNIQUE, 2022–2027 (USD MILLION)

TABLE 99 ROW: UTILITY LOCATOR MARKET, BY VERTICAL, 2018–2021 (USD MILLION)

TABLE 100 ROW: UTILITY LOCATOR MARKET, BY VERTICAL, 2022–2027 (USD MILLION)

10.5.1 MIDDLE EAST & AFRICA

10.5.2 SOUTH AMERICA

11 COMPETITIVE LANDSCAPE

11.1 OVERVIEW

11.2 TOP-FIVE COMPANY REVENUE ANALYSIS

FIGURE 41 UTILITY LOCATOR MARKET: REVENUE ANALYSIS OF TOP FIVE PLAYERS, 2017–2021

11.3 MARKET SHARE ANALYSIS, 2021

TABLE 101 UTILITY LOCATOR MARKET SHARE ANALYSIS (2021)

11.4 COMPETITIVE LEADERSHIP MAPPING, 2021

11.4.1 STARS

11.4.2 EMERGING LEADERS

11.4.3 PERVASIVE PLAYERS

11.4.4 PARTICIPANTS

FIGURE 42 UTILITY LOCATOR MARKET: COMPETITIVE LEADERSHIP MAPPING, 2021

11.5 UTILITY LOCATOR MARKET: COMPANY FOOTPRINT

TABLE 102 COMPANY FOOTPRINT

TABLE 103 OFFERING FOOTPRINT OF COMPANIES

TABLE 104 VERTICAL FOOTPRINT OF COMPANIES

TABLE 105 REGIONAL FOOTPRINT OF COMPANIES

11.6 SMALL AND MEDIUM-SIZED ENTERPRISES (SMES) EVALUATION MATRIX, 2021

11.6.1 PROGRESSIVE COMPANIES

11.6.2 RESPONSIVE COMPANIES

11.6.3 DYNAMIC COMPANIES

11.6.4 STARTING BLOCKS

FIGURE 43 UTILITY LOCATOR, SMES EVALUATION QUADRANT, 2021

11.7 STARTUP EVALUATION MATRIX

TABLE 106 UTILITY LOCATOR MARKET: DETAILED LIST OF KEY
STARTUPS/SMES

TABLE 107 UTILITY LOCATOR MARKET: COMPETITIVE BENCHMARKING OF KEY
STARTUPS/SMES

11.8 COMPETITIVE SITUATIONS AND TRENDS

TABLE 108 UTILITY LOCATOR MARKET: PRODUCT LAUNCHES, 2019–2022

TABLE 109 UTILITY LOCATOR MARKET: DEALS, 2019–2022

12 COMPANY PROFILES

12.1 KEY PLAYERS

(Business Overview, Products Offered, Recent Developments, and MnM View)*

12.1.1 RADIODETECTION LTD.

TABLE 110 RADIODETECTION LTD.: BUSINESS OVERVIEW

FIGURE 44 RADIODETECTION LTD.: COMPANY SNAPSHOT

TABLE 111 RADIODETECTION LTD.: PRODUCT OFFERING

TABLE 112 RADIODETECTION LTD.: PRODUCT LAUNCHES AND DEVELOPMENTS

12.1.2 GUIDELINE GEO

TABLE 113 GUIDELINE GEO: BUSINESS OVERVIEW

FIGURE 45 GUIDELINE GEO: COMPANY SNAPSHOT

TABLE 114 GUIDELINE GEO: PRODUCT OFFERING

TABLE 115 GUIDELINE GEO: PRODUCT LAUNCHES AND DEVELOPMENTS

12.1.3 RIDGE TOOL COMPANY

TABLE 116 RIDGE TOOL COMPANY: BUSINESS OVERVIEW

FIGURE 46 RIDGE TOOL COMPANY: COMPANY SNAPSHOT

TABLE 117 RIDGE TOOL COMPANY: PRODUCT OFFERING

12.1.4 DITCH WITCH (THE CHARLES MACHINE WORKS)

TABLE 118 DITCH WITCH: BUSINESS OVERVIEW

FIGURE 47 DITCH WITCH: COMPANY SNAPSHOT

TABLE 119 DITCH WITCH: PRODUCT OFFERING

12.1.5 LEICA GEOSYSTEMS AG

TABLE 120 LEICA GEOSYSTEMS AG: BUSINESS OVERVIEW

FIGURE 48 LEICA GEOSYSTEMS AG: COMPANY SNAPSHOT

TABLE 121 LEICA GEOSYSTEMS AG: PRODUCT OFFERING

12.1.6 VIVAX-METROTECH CORPORATION

TABLE 122 VIVAX-METROTECH CORPORATION: BUSINESS OVERVIEW

TABLE 123 VIVAX-METROTECH CORPORATION: PRODUCT OFFERING

TABLE 124 VIVAX-METROTECH CORPORATION: PRODUCT LAUNCHES AND DEVELOPMENTS**12.1.7 3M****TABLE 125 3M: BUSINESS OVERVIEW****FIGURE 49 3M: COMPANY SNAPSHOT****TABLE 126 3M: PRODUCT OFFERING****12.1.8 USIC, LLC****TABLE 127 USIC, LLC: BUSINESS OVERVIEW****TABLE 128 USIC, LLC: SERVICE OFFERING****12.1.9 MULTIVIEW LOCATES INC.****TABLE 129 MULTIVIEW LOCATES INC.: BUSINESS OVERVIEW****TABLE 130 MULTIVIEW LOCATES INC.: SERVICE OFFERING****12.1.10 GROUND PENETRATING RADAR SYSTEMS, LLC****TABLE 131 GROUND PENETRATING RADAR SYSTEMS, LLC: BUSINESS OVERVIEW****TABLE 132 GROUND PENETRATING RADAR SYSTEMS, LLC: SERVICE OFFERING**

* Business Overview, Products Offered, Recent Developments, and MnM View might not be captured in case of unlisted companies.

12.2 OTHER PLAYERS**12.2.1 GSSI GEOPHYSICAL SURVEY SYSTEMS, INC.****TABLE 133 GSSI GEOPHYSICAL SURVEY SYSTEMS, INC.: BUSINESS OVERVIEW****12.2.2 MCLAUGHLIN GROUP, INC. (A VERMEER COMPANY)****TABLE 134 MCLAUGHLIN GROUP, INC.: BUSINESS OVERVIEW****12.2.3 MAVERICK INSPECTION LTD****TABLE 135 MAVERICK INSPECTION LTD: BUSINESS OVERVIEW****12.2.4 RHD SERVICES****TABLE 136 RHD SERVICES: BUSINESS OVERVIEW****12.2.5 ONE VISION UTILITY SERVICES****TABLE 137 ONE VISION UTILITY SERVICES: BUSINESS OVERVIEW****12.2.6 UTILITIES PLUS****TABLE 138 UTILITIES PLUS: BUSINESS OVERVIEW****12.2.7 US RADAR INC.****TABLE 139 US RADAR, INC.: BUSINESS OVERVIEW****12.2.8 TECHNICS GROUP****TABLE 140 TECHNICS GROUP: BUSINESS OVERVIEW****12.2.9 GEOTEC SURVEYS LTD.****TABLE 141 GEOTEC SURVEYS LTD.: BUSINESS OVERVIEW****12.2.10 LANDSCOPE ENGINEERING LTD****TABLE 142 LANDSCOPE ENGINEERING LTD: BUSINESS OVERVIEW**

12.2.11 PLOWMAN CRAVEN LIMITED

TABLE 143 PLOWMAN CRAVEN LIMITED: BUSINESS OVERVIEW

12.2.12 ASIAN CONTEC LIMITED

TABLE 144 ASIAN CONTEC LIMITED: BUSINESS OVERVIEW

12.2.13 UTIL LOCATE

TABLE 145 UTIL LOCATE: BUSINESS OVERVIEW

12.2.14 PENHALL COMPANY

TABLE 146 PENHALL COMPANY: BUSINESS OVERVIEW

12.2.15 CHAITANYA INSTRUMENTS PVT LTD

TABLE 147 CHAITANYA INSTRUMENTS PVT LTD: BUSINESS OVERVIEW

12.2.16 DETECTION SERVICES

TABLE 148 DETECTION SERVICES: BUSINESS OVERVIEW

13 ADJACENT & RELATED MARKET

13.1 INTRODUCTION

13.2 LIMITATIONS

13.3 GPR MARKET, BY TYPE

TABLE 149 GPR MARKET, BY TYPE, 2018–2021 (USD MILLION)

TABLE 150 GPR MARKET, BY TYPE, 2022–2027 (USD MILLION)

13.4 HANDHELD SYSTEMS

13.4.1 CONCRETE INVESTIGATION TO DRIVE DEMAND FOR HANDHELD GPR SYSTEMS

13.5 CART-BASED SYSTEMS

13.5.1 CART-BASED SYSTEMS ARE CONSIDERED HIGHEST-QUALITY GROUND INSPECTION DATA PROVIDERS

13.6 VEHICLE-MOUNTED SYSTEMS

13.6.1 TRANSPORTATION INFRASTRUCTURE TO DRIVE DEMAND FOR VEHICLE-MOUNTED SYSTEMS

14 APPENDIX

14.1 DISCUSSION GUIDE

14.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

14.3 CUSTOMIZATION OPTIONS

14.4 RELATED REPORTS

14.5 AUTHOR DETAILS

About

According to the new market research report on the "Utility Locator Market by Technique (Electromagnetic Field, GPR), Offering (Equipment and Services), Target (Metallic and Non-Metallic), Vertical (Oil & Gas, Electricity, Transportation, Water & Sewage, Telecom), and Geography - Global Forecast to 2023", the utility locator market is expected to grow from USD 5.62 Billion in 2018 to USD 7.50 Billion by 2023, at a CAGR of 5.94% between 2018 and 2023. The market is mainly driven by the factors such as the concern for safety and protection of underground utilities, benefits of advanced utility locating technologies over traditional utility locating methods, and government initiatives toward the implementation of utility locators.

Key equipment providers in the utility locator market are

Radiodetection (UK)

Vivax-Metrotech (US)

Guideline Geo (Sweden)

Ridge Tool Company (US)

THE CHARLES MACHINE WORKS (US)

Sensors & Software (Canada)

Leica Geosystem (Switzerland)

3M (US)

USIC (US)

multiVIEW (Canada)

Ground Penetrating Radar Systems (GPRS) (US)

On Target Utility Services (US)

Maverick Inspection (Canada).

The report profiles the most promising players in the market. The competitive landscape of the market is highly dynamic because of the presence of a significant number of big and small players operating in it.

Electromagnetic field locators held largest share of overall market in 2017

The electromagnetic field technique accounted for the largest share of the overall utility locator market in 2017. Factors such as high adoption of electromagnetic field technique to locate metallic utilities, such as electric wires, telephone lines, and cables, and the lower cost of electromagnetic field locators compared to other techniques drive the growth of the market for electromagnetic field locators.

The market for utility locating services to grow at higher CAGR during forecast period

The market for utility locating services is expected to grow at a higher CAGR during the forecast period. Factors such as the rise in the adoption of utility locating systems on a rental basis owing to their high cost of ownership, continuous innovation in utility locating systems, and imposed regulations and standards by the government for using a suitable detecting device before commencing digging, demolishing, or constructing any infrastructure contribute to the higher growth of this market.

North America is major consumer of utility locators

North America accounted for a major share of the overall utility locator market in 2017. Investments in new construction projects and upgrading aging infrastructure in North America have driven the utility locator market growth in this region. The increasing concern for public safety and security and government efforts to avoid damage to pipelines and other utilities during the implementation of remodeling and infrastructure development initiatives facilitate the implementation of utility locating equipment and adopt utility locating services, which, in turn, propels the market growth in North America.

I would like to order

Product name: Utility Locator Market by Technique (Electromagnetic Field, GPR), Offering (Equipment and Services), Target (Metallic Utilities and Non-Metallic Utilities), Vertical (Oil & Gas, Electricity, Transportation) and Region - Global Forecast to 2027

Product link: <https://marketpublishers.com/r/U57989832DEEN.html>

Price: US\$ 4,950.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/U57989832DEEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:
Last name:
Email:
Company:
Address:
City:
Zip code:
Country:
Tel:
Fax:
Your message:

****All fields are required**

Customer signature _____

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below

and fax the completed form to +44 20 7900 3970