

# **Trenchless Pipe Rehabilitation Market Forecasts to 2034 – Global Analysis By Diameter Type (36 Inch Pipes and 18-36 Inch Pipes), Application and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Trenchless Pipe Rehabilitation Market is accounted for \$5.5 billion in 2026 and is expected to reach \$10.1 billion by 2034 growing at a CAGR of 7.8% during the forecast period. Trenchless pipe rehabilitation refers to a set of advanced techniques employed to repair or replace underground pipes without the need for extensive excavation. This innovative approach minimizes disruption to the surrounding environment and infrastructure, offering a more cost-effective and efficient solution compared to traditional methods. The process typically involves the use of various technologies such as cured-in-place pipe (CIPP) lining, pipe bursting, and slip lining. CIPP lining, for instance, involves inserting a resin-coated flexible tube into the damaged pipe, which is then cured in place, creating a durable and seamless new pipeline within the existing one.

According to the American Water Works Association, it has been estimated that >US\$ 1 trillion of investment is required over the next 25 years to repair the degrading water services as well as to ensure their usefulness to serve the growing population of the nation.

## **Market Dynamics:**

**Driver:**

Increasing environmental awareness

As societies become more conscientious about ecological impacts, traditional open-cut methods for repairing and replacing underground pipelines are increasingly scrutinized for their disruptive and environmentally damaging characteristics. Trenchless technologies, such as cured-in-place pipe (CIPP) lining and pipe bursting, offer a sustainable alternative by minimizing surface disruption, preserving landscapes, and reducing overall environmental footprints associated with construction activities. Furthermore, the eco-friendly nature of trenchless pipe rehabilitation aligns with stringent environmental regulations and fosters a positive perception among stakeholders, including government bodies and communities.

**Restraint:**

High initial costs

While these methods offer long-term cost savings through reduced labor, excavation, and restoration expenses, the upfront investment required for specialized equipment, advanced materials, and skilled labor can be substantial. This financial barrier may deter some stakeholders, particularly smaller municipalities or organizations with budget constraints, from embracing trenchless solutions. The need for capital-intensive equipment and the expenses associated with training personnel in specialized techniques contribute to the perception that trenchless rehabilitation is a more financially demanding option compared to traditional open-cut methods.

**Opportunity:**

Technological advancements

Innovations in materials, robotics, and inspection tools have revolutionized trenchless technologies, allowing for more precise and cost-effective solutions. Advanced materials, such as durable resins for cured-in-place pipe (CIPP) lining, contribute to the longevity and structural integrity of rehabilitated pipelines. Robotics play a crucial role in remotely operating equipment and performing intricate tasks in confined spaces, increasing the accuracy and safety of operations. Additionally, sophisticated inspection tools, including high-resolution cameras and sensors, enable thorough assessments of pipeline conditions.

**Threat:**

## Regulatory approval challenges

The implementation of trenchless technologies requires adherence to diverse and often stringent regulations governing underground infrastructure projects. Obtaining necessary approvals can be a protracted and complex process, varying across regions and authorities. The intricacies of navigating regulatory frameworks, obtaining permits, and ensuring compliance with environmental and safety standards contribute to delays in project timelines and increase overall costs. However, the diverse nature of regulatory requirements poses a hurdle for standardization, making it essential for industry stakeholders to invest considerable time and resources in understanding and satisfying the specific demands of different jurisdictions.

**Covid-19 Impact:**

The initial phase witnessed disruptions in project timelines and supply chains, impacting the implementation of trenchless technologies. Construction restrictions, labor shortages, and logistical issues hindered the seamless execution of rehabilitation projects. However, the pandemic also underscored the importance of resilient and efficient infrastructure, potentially driving increased interest in trenchless solutions as governments and industries seek innovative ways to address aging pipelines. Furthermore, the need for remote-operable and less labor-intensive technologies gained prominence during the pandemic, aligning with the features of many trenchless methods.

The 18-36 Inch Pipes segment is expected to be the largest during the forecast period

The 18-36 inch pipes segment is experiencing a substantial boom in the market. This particular pipe size range is commonly found in crucial infrastructure networks, including water supply, sewer, and industrial pipelines. As urbanization and industrial activities intensify, the demand for efficient and minimally disruptive rehabilitation methods for these larger-diameter pipes has surged. Trenchless technologies, such as cured-in-place pipe (CIPP) lining and pipe bursting, offer tailored solutions for the repair and maintenance of 18-36 inch pipes. The ability of these methods to address structural issues, reduce environmental impact, and minimize downtime makes them increasingly attractive to municipalities and industries managing extensive pipeline networks.

The Wastewater Pipes segment is expected to have the highest CAGR during the forecast period

The Wastewater Pipes segment is witnessing a profitable growth in the market due to the escalating global focus on sustainable wastewater management. These technologies enable efficient repair and renovation of wastewater pipes without the disruptive and environmentally impactful aspects of traditional open-cut methods. The Wastewater Pipes segment is witnessing increased adoption of trenchless solutions, driven by the pressing need to address deteriorating systems, reduce leaks, and enhance overall operational efficiency. In addition, governments, municipalities, and wastewater treatment authorities are increasingly turning to trenchless rehabilitation to extend the lifespan of their wastewater pipelines, minimize environmental impact, and ensure the reliable conveyance of wastewater in an environmentally sustainable manner.

### **Region with largest share:**

Asia Pacific region commanded the largest share of the market throughout the extrapolated period. Rapid urbanization, expanding populations, and the need to upgrade aging utility networks have spurred demand for efficient and non-disruptive pipeline rehabilitation solutions. Governments in countries like China and India are investing heavily in modernizing water and wastewater infrastructure, creating a conducive environment for the adoption of trenchless technologies. Moreover, the region's focus on sustainable development aligns with trenchless methods' ability to reduce environmental impact and minimize disruption to densely populated urban areas.

### **Region with highest CAGR:**

Europe region is experiencing lucrative growth throughout the projected period. European governments, recognizing the environmental impact of traditional excavation methods, have implemented strict standards emphasizing eco-friendly solutions. Trenchless pipe rehabilitation, with its minimal surface disruption and reduced carbon footprint, aligns well with these regulatory frameworks. The European Union's emphasis on water quality, conservation, and overall environmental sustainability has led to increased adoption of trenchless technologies for repairing and upgrading underground pipelines.

### **Key players in the market**

Some of the key players in Trenchless Pipe Rehabilitation market include Aegion Corporation, Amex Sanivar, Ashimori Industry, Granite Construction, Ham Baker Adams Ltd, Kurita Water Industries Ltd, NordiTube Technologies, Per Aarsleff A/S, Deep Trekker Inc, RSM Lining Supplies Global Ltd, SAERTEX MultiCom, SAK Construction and Waterline Renewal Technologies.

### **Key Developments:**

In February 2023, The Vortex Companies LLC, a leading player in advanced trenchless water and sewer technologies and infrastructure renewal services, launched its latest, inclusive UV Cured-in Place-Pipe systems solutions portfolio.

In October 2022, Insituform offers Harrisburg, Pennsylvania, community wastewater rehabilitation solutions. This project will be concluded in various stages. Approximately three miles of interceptor sewer will be repaired by a trenchless process called cured-in-place pipe repair. This process is different from the conventional process as this method utilizes no-dig technology to repair old-fashioned sewer pipes.

In August 2022, Western Australia's Water Corporation undertook a project to renew old water pipes across Perth as part of the Pipes for Perth program. It rehabilitates around 700 m of outdated water pipelines in Kings Park between Bellevue Terrace and Mount Eliza Reservoir.

### **Diameter Types Covered:**

>36 Inch Pipes

18-36 Inch Pipes

### **Applications Covered:**

Wastewater Pipes

Water Main Pipes

Industrial Pipelines

## Other Applications

### Regions Covered:

#### North America

US

Canada

Mexico

#### Europe

Germany

UK

Italy

France

Spain

Rest of Europe

#### Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

### **What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

## **Free Customization Offerings:**

All the customers of this report will be entitled to receive one of the following free customization options:

### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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