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Cured-in-Place Pipe Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Resin Type (Polyester, Glass Fiber Reinforced Polymer, Others), By Curing Method (Steam Curing, UV Curing, Others), By Application (Water & Sewer Lines, Gas Pipelines, Industrial Piping, Others), By Region, and By Competition, 2020-2030F

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Abstracts

Market Overview

The Global Cured-in-Place Pipe Market was valued at USD 2.91 Billion in 2024 and is expected to reach USD 3.89 Billion by 2030 with a CAGR of 4.82% during the forecast period.

The global Cured-in-Place Pipe (CIPP) market is witnessing strong growth momentum as aging infrastructure, rising urbanization, and increasing demand for cost-effective pipeline rehabilitation continue to drive adoption worldwide. CIPP, a trenchless rehabilitation method used to repair existing pipelines without excavation, has become a preferred solution for municipalities, utilities, and industrial operators seeking to extend the life of water, sewer, gas, and industrial pipelines. Compared to traditional dig-and-replace methods, CIPP offers significant advantages including reduced environmental disruption, faster installation times, and lower overall costs, making it particularly attractive for densely populated urban regions where infrastructure renewal must balance efficiency with minimal public inconvenience. The market is supported by government investments in modernizing water and wastewater networks, especially in North America and Europe, where infrastructure is decades old and requires urgent rehabilitation. At the same time, rapid urbanization and industrial expansion in Asia-

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Pacific are driving new opportunities, as cities in China, India, and Southeast Asia face rising demand for efficient pipeline systems coupled with budgetary and environmental constraints.

From a technology perspective, advancements in resin chemistry, liner materials, and curing methods are reshaping market dynamics. Polyester resins remain the most widely used due to their cost-effectiveness, but vinyl ester and epoxy are gaining share in applications requiring higher chemical and temperature resistance. Steam curing dominates the market thanks to its proven performance and cost benefits, while UV curing is the fastest-growing segment, offering faster installation, lower energy use, and enhanced durability, making it increasingly attractive in high-density and environmentally sensitive areas. Small-diameter pipes, especially those under one foot, hold the largest market share as residential and commercial service lines frequently require rehabilitation. Meanwhile, large-diameter installations are also growing steadily as municipalities target sewer mains and water transmission pipelines.

Key Market Drivers

Aging Infrastructure & Pipeline Deterioration

One of the strongest market drivers for CIPP is the extensive aging infrastructure across the globe. In North America alone, more than 2.2 million miles of pipelines are in need of rehabilitation, many of which are beyond their intended lifespan. Studies show that 42% of municipal pipelines are over 50 years old, placing them at high risk of leaks, blockages, and breaks. In the United States, drinking water systems have been rated C? while wastewater systems have been rated D+, underscoring the critical condition of the underground network. Aging infrastructure is not limited to the U.S.—many European cities face similar challenges, with more than 35% of sewer systems exceeding 40 years of service life. Municipalities are increasingly adopting trenchless technologies, and about 39% of utility providers already use CIPP methods for at least part of their rehabilitation programs. Case projects demonstrate the impact: in Texas, for example, over 30,000 feet of cast-iron water mains were rehabilitated using trenchless methods, saving over USD5 million compared to open-cut replacement. These figures highlight how widespread deterioration of water, sewer, and industrial pipelines is fueling consistent global demand for CIPP as a cost-effective and less disruptive rehabilitation solution.

Key Market Challenges

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High Initial Installation and Material Costs

One of the foremost challenges in the global CIPP market is the relatively high upfront cost of installation compared to traditional dig-and-replace methods. The specialized equipment, resins, and liners required for CIPP rehabilitation projects demand significant investment, making it less accessible for municipalities with limited budgets. For instance, epoxy and polyester resin prices have risen by more than 20% in recent years due to raw material supply fluctuations, directly impacting project costs. Additionally, the cost of advanced UV curing systems can exceed several hundred thousand dollars, creating barriers for small contractors. Labor is another factor, as trained technicians who can handle trenchless rehabilitation demand premium wages. Furthermore, transportation of liners and resin-impregnated materials requires controlled conditions, adding logistics expenses. While the method reduces long-term costs by minimizing excavation and restoration, the upfront financial burden discourages adoption in cost-sensitive regions. This creates a market barrier, particularly in developing countries where infrastructure rehabilitation is needed most but budgets are constrained. The long-term cost-benefit often fails to outweigh the short-term expenditure from a procurement standpoint, slowing market penetration.

Key Market Trends

Rising Demand for Eco-Friendly and Non-Styrene Resins

Sustainability concerns are driving a notable trend toward eco-friendly resins in CIPP applications. Traditional styrene-based resins are being replaced with non-styrene alternatives such as vinyl ester, silicate, and epoxy systems, which release significantly fewer VOCs during curing. For instance, non-styrene resins can cut VOC emissions by up to 90%, addressing environmental regulations and community concerns. Additionally, epoxy-based liners provide superior mechanical strength and chemical resistance, extending service life to more than 50 years in some applications. Though these alternatives are more expensive, municipalities are increasingly willing to invest in sustainable solutions to meet climate targets. The adoption of green resins is also supported by certification programs that recognize environmentally friendly construction practices. Demand for sustainable CIPP solutions is particularly high in Europe, where regulatory frameworks such as REACH and the EU Green Deal encourage the use of safer materials. This shift toward eco-friendly resins not only mitigates regulatory risks but also enhances public acceptance of trenchless rehabilitation technologies, positioning them as sustainable infrastructure solutions.

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Key Market Players

Aegion

Granite Construction

Inland Pipe Rehabilitation

SAK Construction

Michels Corporation

PURIS Corporation

Per Aarsleff A/S

Reline UV Group

SAERTEX multiCom GmbH

IMPREG Group

Report Scope:

In this report, the Global Cured-in-Place Pipe Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Cured-in-Place Pipe Market, By Resin Type:

Polyester

Glass Fiber Reinforced Polymer

Others

Cured-in-Place Pipe Market, By Curing Method:

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- Steam Curing
- UV Curing
- Others

Cured-in-Place Pipe Market, By Application:

- Water & Sewer Lines
- Gas Pipelines
- Industrial Piping
- Others

Cured-in-Place Pipe Market, By Region:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - Germany
  - France
  - United Kingdom
  - Italy
  - Spain
- South America

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- Brazil
- Argentina
- Colombia

Asia-Pacific

- China
- India
- Japan
- South Korea
- Australia

Middle East & Africa

- Saudi Arabia
- UAE
- South Africa

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Cured-in-Place Pipe Market.

Available Customizations:

Global Cured-in-Place Pipe Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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Company Information

Detailed analysis and profiling of additional market players (up to five).

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