

Middle East & Africa Pipe Relining Market Size and Forecast (2021 - 2031)

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Abstracts

The Middle East & Africa (MEA) Pipe Relining Market is projected to experience significant growth, with an expected market size of approximately US\$ 419.0 million by 2031, up from US\$ 277.1 million in 2024. This growth translates to a compound annual growth rate (CAGR) of 6.3% from 2025 to 2031, driven by various factors including increased investments in the oil and gas sector, advancements in sewerage infrastructure, and improvements in water and wastewater treatment facilities.

Market Overview

The MEA pipe relining market is categorized into several regions, including South Africa, the UAE, Saudi Arabia, and the broader Middle East & Africa. The oil and gas sector plays a crucial role in the economies of these countries, contributing significantly to their GDP. For instance, the Abu Dhabi National Oil Company (ADNOC) has announced plans to invest over US\$ 13 billion from 2024 to 2029 to expand its liquefied natural gas (LNG) exploration operations. Similarly, Saudi Aramco reported total capital investments of US\$ 49.7 billion in 2023, marking a 28% increase from the previous year, with expectations for 2024 investments to range between US\$ 48-58 billion.

The demand for pipe relining services in the region is further fueled by rising per capita income, a recovering economy, and increased government spending on infrastructure development. Despite recent economic slowdowns and fluctuations in oil prices, oil and gas-producing nations in the MEA are focusing on enhancing production capabilities by collaborating with international firms to develop large offshore and onshore oil and gas fields. This ongoing commitment to boosting oil and gas extraction is a key driver for the pipe relining market.

Market Segmentation

The MEA pipe relining market can be segmented based on various criteria:

By Solution: The market is divided into Products and Services, with Services holding the largest market share in 2024.

By Products: This includes CIPP Equipment, Liners, High Pressure Water Jetters, Inversion Drums, Pulling Machines, and others, where CIPP Equipment is the leading segment.

By Services: The market is segmented into Cured-in-place Pipe, Pull-in-place, Pipe Bursting, and Internal Pipe Coating, with Cured-in-place Pipe dominating the market.

By Cured-in-place Pipe: This further divides into Patch or Spot Repair and Liner or Longer Repair, with Liner or Longer Repair being the most significant segment.

By Curing Method: The methods include Ambient Cure, Hot Water Cure, Steam Cure, and UV Light Cure, with Hot Water Cure leading the market.

By End-user: The market is segmented into Oil and Gas, Chemicals, Municipal, and others, with Oil and Gas holding the largest share.

Technological Advancements

Trenchless technologies are revolutionizing the pipe installation and repair landscape by minimizing surface disruption and environmental impact. Notably, the introduction of robotics in trenchless pipe relining is a significant advancement. Robotic lateral reinstatement cutters are designed to cut holes from within small-diameter pipes, allowing for the restoration of existing connections without extensive excavation. Companies like ProKASRO are leading the way in pipe rehabilitation using advanced robotic technologies, which enhance safety and efficiency by reducing traffic disruptions and noise pollution.

The Cape Flats Bulk Sewer Rehabilitation Project in Cape Town exemplifies the future of pipeline infrastructure in the MEA region. This project highlights the effectiveness of

spirally wound pipe (SWP) relining, a trenchless technology that inserts a continuous strip of PVC into existing pipes, creating a corrosion-resistant lining. This method minimizes environmental impact and project costs while providing faster installation and longer-lasting solutions. As urbanization accelerates in MEA countries, technologies like SWP relining are essential for modernizing aging infrastructure. The use of CCTV inspections and vacuum excavation technology, as demonstrated in the Cape Flats project, allows for precise assessments and safer repairs, addressing immediate infrastructure needs while promoting sustainable urban systems.

Country Insights

The MEA pipe relining market is further analyzed by country, with South Africa holding the largest market share in 2024. South Africa is expanding its oil and gas sector, with approximately 15 projects underway that are expected to increase annual crude oil production to around 27 billion barrels and gas production to about 60 trillion cubic feet from 2023 to 2027. Notably, Tetra4, a subsidiary of Renergen, has commenced commercial LNG production in South Africa, and several onshore oil and gas projects are in development. A significant joint venture on the African Renaissance Pipeline project, valued at around US\$ 6 billion, aims to transport gas from Mozambique to South Africa, further driving demand for pipeline networks and benefiting the pipe relining market.

Competitive Landscape

Key players in the MEA pipe relining market include Roto-Rooter Group Inc, Silverlining Holding Corp, Aegion Corp, RPB Inc, Pipe Restoration Solutions Inc, and others. These companies are employing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase market share. As the demand for pipe relining services continues to grow, these players are well-positioned to capitalize on emerging opportunities in the region.

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