

North America Trenchless Pipe Relining Market Forecast to 2028 -Regional Analysis by Method (Cured in Place Pipe (CIPP), Pull-in-Place, Pipe Bursting, and Internal Pipe Coating); Diameter (Below DN 50, DN 51-DN 150, DN 151-DN 250, and Above DN 251); and End User (Residential, Commercial, Industrial, and Municipal)

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Abstracts

The North America trenchless pipe relining market is expected to grow from US\$ 643.41 million in 2023 to US\$ 824.89 million by 2028. It is estimated to grow at a CAGR of 5.1% from 2023 to 2028.

Rising Number of Aging Pipeline Infrastructure Drive North America Trenchless Pipe Relining Market

The pipeline infrastructure across the world is aging day by day. There were over two and a half million miles of pipeline across the US as of 2020, half of which is over fifty years old. The aging pipeline infrastructure can lead to severe consequences, such as regional bottlenecks, supply disruptions due to leaks and maintenance shutdowns, increased potential for environmental damage, and raises safety concerns. According to Endeavor Business Media, LLC, water losses through leaks in utilities in the US is average 15% annually, with some cities, towns, and communities losing more than half of all water pumped and treated for distribution to customers. Further, the number of water main breaks from Syracuse to Los Angeles is ~240,000 per year. The cost of these leaks is worth around US\$2.6 billion per year. With these aging infrastructures, maintaining, repairing, and monitoring these pipelines is necessary. The need to invest in restoring aging infrastructure is increasing. Hence, maintaining existing pipelines with

solutions such as trenchless pipe relining is in demand. Trenchless pipe relining solutions are gaining traction due to their performance and technical advantages. These solutions repair existing underground pipelines with limited or no excavation while avoiding traffic jams, landscape destruction, and other environmental impacts. Thus, pipeline operators are increasingly adopting trenchless pipe relining solutions to overcome the problem of aging infrastructure, which is driving the growth of the North America trenchless pipe relining market.

North America Trenchless Pipe Relining Market Overview

A majority of underground water pipes constructed across North America have passed their estimated life span, resulting in severe consequences. According to American Water Works, 44% of water infrastructure in the US is of poor quality. Also, as per the American Society of Civil Engineers' estimation, approximately 240,000 water main breaks occur annually in the region. These failing conditions of the pipes lead to a shortage of clean water, affecting people's health across the region. Thus, the growing aging pipe infrastructure in the region drives governments of various North American countries, such as the US, Canada, and Mexico, to repair and maintain it. To cater to this, governments of these countries are opting for different trenchless pipe relining methods for better functionality of the infrastructure. For instance, in June 2022, the government of Oregon announced that they have used the cured-in-place pipe (CIPP) method to maintain aging sewer pipes in Medford. For this project, the crew members relined the existing pipes with a felt liner saturated with epoxy, then inflated and cured it. Using this method, the crew members can avoid digging the roads and ensure minimal disruption to residents. Also, through this method, the government was able to provide longer pipe section repairs. Thus, the rising use of trenchless pipe relining to repair pipes is fueling the market growth in the region. Moreover, there is a large presence of service providers that help multiple organizations to repair pipes across North America. For example, US Pipelining, LLC helped to restore a 24-inch diameter high-pressure, high-temperature inter-condenser line in the In-Space Propulsion Facility (ISP) at NASA's John Glenn Plum Brook facility. Thus, the company installed a project specific CIPP within the facility's inter-condenser line to meet NASA specifications. Similarly, Dynamic Drain Technologies also provided repair services for the roof drain at the US postal service. Under this project, the company inspected, cleaned, and relined the roof drains at the busiest post offices in Washington, DC. Thus, the rising need for pipe relining solutions and the presence of several service providers in the region is fueling the growth of the North America trenchless pipe relining market.

North America Trenchless Pipe Relining Market Revenue and Forecast to 2028 (US\$)

Million)

North America Trenchless Pipe Relining Market Segmentation

The North America trenchless pipe relining market is segmented into method, diameter, end user, and country.

Based on method, the North America trenchless pipe relining market is segmented into cured in place pipe (CIPP), pull-in-place, pipe bursting, and internal pipe coating. In 2023, the cured in place pipe (CIPP) segment registered a largest share in the North America trenchless pipe relining market.

Based on diameter, the North America trenchless pipe relining market is segmented into below DN 50, DN 51-DN 150, DN 151-DN 250, and Above DN 251. In 2023, the below DN 50 segment registered a largest share in the North America trenchless pipe relining market.

Based on end user, the North America trenchless pipe relining market is segmented into residential, commercial, industrial, and municipal. In 2023, the residential segment registered a largest share in the North America trenchless pipe relining market.

Based on country, the North America trenchless pipe relining market is segmented into the US, Canada, and Mexico. In 2023, the US segment registered a largest share in the North America trenchless pipe relining market.

MaxLiner USA (Applied Felts Inc); NuFlow Technologies Inc; QuakeWrap Inc; Reline Solutions Pty Ltd; RelineEurope GmbH; Relining Group International Oy; Sekisui SPR Americas LLC; Trelleborg Sealing Profiles Sweden AB; Vortex Co LLC; and Waterline Renewal Technologies Inc are the leading companies operating in the North America trenchless pipe relining market.

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