

# **North America Trenchless Pipe Relining Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Method (Cured in Place Pipe, Pull-in-Place, Pipe Bursting, and Internal Pipe Coating), End-user (Municipal, Industrial, Commercial, and Residential), Diameter (Below DN 50, DN 51 - DN 150, DN 151 - DN 250, and Above DN 251), and Curing Method (Ambient Cure, Hot Water Cure, Steam Cure, and UV Light Cure)**

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## **Abstracts**

The North America Trenchless Pipe Relining Market is projected to grow significantly, reaching an estimated US\$ 1,964.6 million by 2031, up from US\$ 1,274.9 million in 2024, reflecting a compound annual growth rate (CAGR) of 6.5% from 2025 to 2031. This growth is largely driven by the urgent need to address the aging water infrastructure across the region, which has led to severe consequences for public health and environmental safety.

A substantial portion of underground water pipes in North America has surpassed their expected lifespan, with the American Water Works Association reporting that 44% of water infrastructure in the U.S. is in poor condition. The American Society of Civil Engineers estimates that there are approximately 240,000 water main breaks annually in the U.S. alone. With over 17.9 billion feet of drainage pipes and lateral sewers exceeding 50 years in age, the need for maintenance and repair is critical. The deteriorating state of these pipes not only leads to water shortages but also poses health risks to the population.

In response to these challenges, governments in the U.S., Canada, and Mexico are increasingly investing in trenchless pipe relining methods to enhance the functionality of

their water infrastructure. The Infrastructure Investment and Jobs Act (IIJA) has provided significant funding, with billions allocated to the sewer and water markets in 2024. Municipal surveys indicate a staggering requirement of nearly US\$ 118 billion for sewer infrastructure, US\$ 95 billion for water systems, and US\$ 30 billion for stormwater management to address ongoing system issues.

The trenchless pipe relining market is segmented by various factors, including method, end-user, diameter, and curing method. In 2024, the Cured in Place Pipe (CIPP) method was the dominant technique, while the municipal sector was the leading end-user. Additionally, pipes with diameters below DN 50 were the most prevalent, and the hot water cure method was the preferred curing technique.

Globally, the need for effective wastewater treatment is underscored by the UN-Water Progress on Wastewater Treatment report, which revealed that 42% of domestic wastewater generated in 2022 was discharged without adequate treatment. This situation is exacerbated by the aging sewer systems that struggle to cope with the volume of untreated wastewater, leading to blockages and leaks. The deteriorating state of pipeline infrastructure is a significant driver for the adoption of trenchless technology, particularly in the U.S., where a large portion of installed pipelines is in urgent need of rehabilitation. The water main break rates have surged by 27% from 2012 to 2018, resulting in the loss of approximately 6 billion gallons of treated water daily due to pipe deterioration.

As the urgency to maintain and repair aging pipelines grows, trenchless pipe relining solutions are becoming increasingly popular. These methods offer significant advantages, such as minimal excavation, reduced traffic disruption, and lower environmental impact. Consequently, many pipeline operators are turning to trenchless solutions to address the challenges posed by aging infrastructure.

In terms of geographical distribution, the North America Trenchless Pipe Relining Market is primarily segmented into the United States, Canada, and Mexico, with the U.S. holding the largest market share in 2024. The U.S. has over 2.5 million miles of pipeline, with a significant portion over 50 years old. The Environmental Protection Agency (EPA) has projected that the replacement rates for water pipes will peak by 2035, necessitating repairs on 16,000 to 20,000 miles of pipes annually.

The Midwest and Southeast regions of the U.S. are particularly affected by water loss due to high rates of pipe breakage. In response to these infrastructure challenges, the Bipartisan Infrastructure Law, signed by President Biden in November 2021, allocated over US\$ 50 billion for infrastructure improvements over the next five years. This investment represents the largest financial commitment in U.S. history aimed at enhancing drinking water, wastewater, and sewage systems. Projects like the Front Street Interceptor in Harrisburg, Pennsylvania, which features innovative rehabilitation techniques, exemplify the growing trend towards modernizing water distribution

networks.

Key players in the North America trenchless pipe relining market include The Charles Machine Works Inc, Trelleborg AB, RelineEurope GmbH, and Vortex Co LLC, among others. These companies are actively pursuing strategies such as mergers and acquisitions, product innovation, and market expansion to enhance their competitive edge and meet the increasing demand for trenchless pipe relining solutions.

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