

South & Central America Pipe Relining Market Size and Forecast (2021 - 2031)

<https://marketpublishers.com/r/SC80FD6DA65DEN.html>

Date: April 2026

Pages: 189

Price: US\$ 3,450.00 (Single User License)

ID: SC80FD6DA65DEN

Abstracts

The South and Central America Pipe Relining Market is projected to grow significantly, reaching an estimated US\$ 484.5 million by 2031, up from US\$ 355.9 million in 2024. This growth reflects a compound annual growth rate (CAGR) of 4.8% from 2025 to 2031.

Executive Summary and Market Analysis

In 2023, ExxonMobil announced plans for its sixth offshore oil project in Guyana, with an investment of US\$ 12.93 billion. Similarly, Petrobras, a major Brazilian oil and gas company, revealed intentions to install 11 new offshore drilling platforms across various locations in Brazil. These developments in offshore oil and gas exploration are expected to significantly boost the pipe relining market in Brazil, as increased drilling activities necessitate enhanced pipeline maintenance and infrastructure upgrades.

In 2024, Peru's investment promotion agency, ProInversion, initiated contracts for a series of water projects aimed at attracting private investment through public-private partnerships (PPPs). Approximately 21 projects are set to be tendered between 2024 and 2026, with expected investments totaling US\$ 2.28 billion. This initiative, alongside efforts to decentralize operations and identify new projects, is anticipated to drive demand for water treatment and sewerage facilities, thereby increasing the need for pipeline maintenance and relining services. The growing demand for clean water in sectors such as food and beverages, manufacturing, and construction further supports the pipe relining market in South and Central America. Additionally, government initiatives aimed at reducing environmental pollution and addressing public health concerns related to waterborne diseases are expected to propel market growth in the region over the forecast period.

Strategic Insights

Market Segmentation Analysis

The South and Central America 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: Key segments include CIPP Equipment, Liners, High-Pressure Water Jetters, Inversion Drums, Pulling Machines, and others. CIPP Equipment is expected to dominate this segment in 2024.

By Services: This includes Cured-in-place Pipe, Pull-in-place, Pipe Bursting, and Internal Pipe Coating, with Cured-in-place Pipe leading the market share.

By Cured-in-place Pipe: This segment is further divided into Patch or Spot Repair and Liner or Longer Repair, with Liner or Longer Repair expected to hold the largest share.

By Curing Method: The market is segmented into Ambient Cure, Hot Water Cure, Steam Cure, and UV Light Cure, with Hot Water Cure anticipated to dominate.

By End-user: The market is categorized into Oil and Gas, Chemicals, Municipal, and others, with Oil and Gas holding the largest share in 2024.

Market Outlook

The rise of smart cities is a significant trend influencing the pipe relining market. As urban populations grow, the demand for efficient water and energy management becomes critical. Governments and companies are increasingly adopting smart water management systems to minimize water wastage caused by aging and damaged pipes. Smart cities leverage innovative technologies to enhance water management, leading to improved efficiency, cost savings, and proactive decision-making. Pipe relining plays a crucial role in these smart city initiatives, allowing for efficient infrastructure

maintenance with minimal disruption.

Rapid urbanization and investments in smart city projects across South America are creating substantial opportunities for the pipe relining market. With projections indicating that over 80% of the region's population will reside in urban areas by 2030, cities face mounting pressure to upgrade their aging water and wastewater infrastructure. National governments in Brazil, Chile, Colombia, and Mexico are accelerating smart city initiatives focused on digital water management, sustainability, and climate resilience. These projects emphasize data-driven infrastructure maintenance and low-disruption rehabilitation, where trenchless technologies like pipe relining offer significant advantages.

The application of cured-in-place pipe and spray-lining systems enables quicker and more cost-effective pipeline renewal with less excavation, aligning with smart city goals for efficiency and reduced carbon footprints. Furthermore, public-private partnerships and international financing from organizations such as the Inter-American Development Bank (IDB) and the World Bank are facilitating increased investment in modernizing water technology in the region. Lessons from recent infrastructure programs indicate that cities utilizing trenchless methods can achieve up to a 40% reduction in lifecycle costs and shorter project timelines.

Country Insights

The South and Central America Pipe Relining Market is segmented by country into Brazil, Argentina, and the Rest of South and Central America, with the Rest of South and Central America holding the largest market share in 2024. Various initiatives, including partnerships and increased investments, are being implemented to accelerate the growth of the pipe relining market. For example, the Peruvian government plans to allocate US\$ 3 billion for the construction of sewage treatment plants, aiming to expand sewage and potable water services to 100% coverage in the coming years. Such initiatives are expected to drive the future implementation of pipe relining across the region.

Company Profiles

Key players in the South and Central America Pipe Relining Market include Roto-Rooter Group Inc, Silverlining Holding Corp, Aegion Corp, RPB Inc, Pipe Restoration Solutions Inc, The Charles Machine Works Inc, Sekisui Chemical Co Ltd, Waterline Renewal Technologies Inc, NuFlow Technologies Inc, Brawo Systems GmbH, Advanced

Trenchless Solutions LLC, Picote GROUP, Atlantic Pipe Services, Roddie Inc., TRIC Tools, Inc., and PURIS Corp. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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