

Trenchless Pipe Relining Market Forecast to 2028 - COVID-19 Impact and Global 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 trenchless pipe relining market size is expected to grow from US\$ 2,211.66 million in 2023 to US\$ 2,954.71 million by 2028; it is estimated to record a CAGR of 6.0% from 2023 to 2028.

Trenchless technologies involve methods of new pipe installation with minimum surface and environmental disruptions. One such technological advancement in trenchless pipe relining is the introduction of robotics. Trenchless pipe repair robotic lateral reinstatement cutters are essential to cut holes from the inside of a small diameter pipe and re-establish existing connections. These rugged robots are configured to allow specialized situations to be navigated with straightforward design and assembly. Furthermore, ProKASRO offers trenchless pipe rehabilitation with advanced robots. Their trenchless pipe rehabilitation works without traffic obstructions and noise pollution, ensuring workforce safety while saving time and effort. In addition, in February 2023, GE demonstrated carbon cutting pipe-building robot to inspect and restore natural gas pipelines. Thus, the introduction of robotics in trenchless pipe relining is expected to emerge as a significant trend in the trenchless pipe relining market in the coming years.

Impact of COVID-19 Pandemic on Trenchless Pipe Relining Market

The COVID-19 had a negative impact on the trenchless pipe relining market. In 2020, all the offices and manufacturing plants were shut down temporarily and all the scheduled pipeline repairing activities were also stopped globally. In Europe, Germany, Italy, the UK, Russia, France, and Spain were among the most-affected countries by COVID-19 pandemic. Governments in the region imposed various regulations to curb the spread of the virus. Several countries in the region witnessed an economic hit and a decline in industrial activities in Q2 of 2020. Many European countries closed their borders and implemented drastic measures on the transport of goods. The halt in transportation activities has drastically affected the manufacturing of pipe relining solutions in Europe. However, in Q1 of 2021, since the government restrictions were lifted, the market players resumed manufacturing activities. In addition, the government authorities were able to restart the halted pipeline rehabilitation activities, which further fueled the growth of the trenchless pipe relining market post-lockdown.

The demand for water management to ensure clean and safe drinking water for the citizens of Germany is increasing, which is creating a need for regular maintenance and repair of the pipelines. In addition, various sewage lining projects are under construction in the country for the better functionality of these pipes. For example, the Friedensstrasse project was a sewage lining project, under which a new and tight-fitting polyethylene (PE) pipe was placed inside the existing pipelines. The project involved inserting a PE liner in the old DN 1000 mm pipe in two phases, which needed digging of three building pits. Similarly, the spiral-wound pipe project in Ansbach, Germany, was another pipe infrastructure rehabilitation project. The sewer section required rehabilitation and was located under the busy promenade in Central Ansbach. As the traditional relining method was not feasible, the authorities repaired the infrastructure using the spiral-wound trenchless technology. Thus, the growing adoption of trenchless pipe relining technology in Germany is fueling the trenchless pipe relining market growth.

Asia Pacific held the largest trenchless pipe relining market share in 2022 and is expected to register the highest CAGR during the forecast period. Based on country, the Asia Pacific trenchless pipe relining market is segmented into Australia, China, India, Japan, South Korea, and the Rest of Asia Pacific. In 2022, China held the largest trenchless pipe relining market share in Asia Pacific, followed by India.

India is making rapid growth in the technological and industrial sectors. As a developing country with one of the world's largest populations, the need for fast and cost-effective pipe-relining solutions is rising. With a lack of proper repair and maintenance solutions for the damaged or degrading pipeline infrastructure, the country will face overflowing

water and wastage through the water supply system and sewer lines. In addition, various Indian cities such as Kolkata, Mumbai, and Banaras still have pipelines that are considered to be ~100 years old. Such an aging pipe infrastructure mostly faces structural failure and silting of the pipelines. Also, many pipelines have to be pumped due to sluggish flow, which is caused due to improper grade or slope. Hence, trenchless technology is the best method to repair, maintain, and study the country's sub-surface condition of pipeline infrastructure. Thus, the presence of aging pipeline infrastructure in the country is likely to create an opportunity for the growth of the trenchless pipe relining market in India in the coming years.

Brawo Systems GmbH, Trelleborg Sealing Profiles Sweden AB, SEKISUI SPR, Sanikom D.O.O, Waterline Renewal Technologies, Nuflow Technologies, Maxliner USA, Vortex Companies, Relining Group, RelineEurope GmbH, RTI Rohrtechnik Gruppe, QuakeWrap, and Reline Solutions are among the players operating in the global trenchless pipe relining market and profiled in this market study.

The overall trenchless pipe relining market size has been derived using both primary and secondary sources. To begin the trenchless pipe relining market analysis research process, exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the trenchless pipe relining market. The process also serves the purpose of obtaining an overview and market forecast of the trenchless pipe relining market growth with respect to all market segments. Also, multiple primary interviews have been conducted with industry participants and commentators to validate the data and gain more analytical insights about the topic. Participants of this process include industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the trenchless pipe relining market.

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