Utility Locator - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Utility Locator Market size is estimated at USD 0.97 billion in 2025, and is expected to reach USD 1.33 billion by 2030, at a CAGR of 6.56% during the forecast period (2025-2030).

Utility Locating uses technology such as ground penetrating radar to locate pipes, cables, and other service infrastructure under the surface of a site. Utility Locators can also chart where underground cables and pipes are so that damage to these things can be avoided and planned around during excavation. Standard underground utilities include gas lines, water pipes, and telephone lines. These utilities are a vital part of the infrastructure, and the need for them to remain undisturbed is paramount.

Key Highlights
- Factors such as increased real-time detection of leakages, inspections, monitoring of underground utilities, stringent government policies to locate underground utilities before excavating and construction activities, and the development of technologically advanced tools are driving the utility locator market's growth.
- For instance, over the past few years, the subsurface utility engineering (SUE) industry has developed innovative ways of tackling the challenges of locating underground utility infrastructure. Geophysical technologies like electromagnetic locators and ground-penetrating radars are used alongside non-technical means, like historical records, to gather sufficient subsurface infrastructure information.
- Furthermore, the expanding use cases and technological developments are also encouraging the vendors to develop innovative solutions and launch them in the market. For instance, in May 2023, Vermeer Corporation developed the new GPS-enabled Verifier G3+ utility locator. Designed to deliver accuracy, optimized connectivity, and intuitive controls, the new utility locator from the company pairs with smartphones using the G3+ Map mobile app to plot location information, including current index, depth, GPS data, device name, utility type, and the operator who performed the work.

- Additionally, several international projects such as the high-speed rail line in Indonesia for USD 5.5 billion, the high and semi-high-speed rail and bullet train projects in India, and construction projects across various countries are expected to continue to drive the demand for utility locating solutions drastically in the coming years, driving the growth of the studied market.
- However, the equipment's high possession and maintenance costs and lack of expert skills can limit the future utility locator market's growth. Nevertheless, factors such as the growing demand for real-time utility locating tools and services and deteriorating infrastructure will provide abundant opportunities to the players in the market.
- Macroeconomic factors such as economic growth, recession, etc., play a crucial role in the growth of the studied market. These factors significantly influence the value and volume of investments in new construction and utility projects, which are among the primary end-users for utility locators. For instance, the looming threat of recession in the North American region may have a restraining impact on the growth of the studied market.

Utility Locator Market Trends

Transportation Sector to Hold Significant Market Share

- As transportation is a crucial pillar in facilitating the economic development of any region, significant emphasis is given to gathering information such as subsurface site characterizations before starting the construction of transportation-related infrastructure projects to prevent possible delays and cost overruns in a project. Utility locators detect, survey, and mark the land, significantly reducing uncertainty. Digital technologies such as electromagnetic fields and GPS in utility locators aid timely coordination and communication between operational points in various processes such as mapping and survey, enhancing precision and accuracy.
- For instance, more than 56 million kilometers (35 million miles) of known underground utilities exist in the United States, and many remain unidentified. Available underground utilities include electric and gas lines, pipes (both large and small), telephone, and internet cables, all of which could be at risk if a transportation agency digs into the earth without gathering adequate information.
- Road and highway construction across the world has been growing steadily, driven by increased car ownership, government investment, and urbanization. According to the US Census Bureau, in 2023, total transportation construction spending in the United States was about USD 63.82 billion. Such trends create a favorable outlook for the growth of the studied market in the region.
- Investments in projects supporting the transporting infrastructure are growing at a higher rate across developing countries such as India, China, Brazil, Vietnam, etc. For instance, according to the Ministry of Road Transport & Highways, India's MoRTH constructed 5337 km of National Highways till December 2022 and was also awarded 6318 km of National Highway contracts. As these projects pass through several cities and residential areas wherein various utility infrastructures are already laid out, such trends favor the studied market's growth.

North America is Expected to Showcase Significant Market Growth

- North America has been among the leading adopters of new technologies; hence, the region is anticipated to continue to account for a significant share of the utility locator market over the forecast period. Factors such as the increasing demand for enhanced surveillance and innovative construction equipment in advanced economies, including the United States and Canada, also support the studied market's growth in North America.
- The telecommunication sector in the United States is flourishing and experiencing collaborative measures by several major players with the technology provider to gain a first-mover advantage by rolling out the 5G service. For instance, in March 2022,

Verizon and Live Nation announced a 5G technology partnership. Verizon is outfitting iconic venues across the United States with 5G Ultra Wideband built for significant scale events. As fiber optic cables play a crucial role in the development/expansion of telecommunication networks, such trends are anticipated to influence the studied market's growth positively.
- In the North American region, several major transportation infrastructure development projects are either underway or are being outlined by the regional governments, which is also creating opportunities in the studied market. For instance, the Canadian government is currently working on a new High Frequency Rail project that aims to provide clean, efficient, and safe transportation to Canadians. In early 2023, the Canadian government announced the groups that would be able to submit proposals for this project.
- Furthermore, according to the record of the NUAR (National Underground Asset Registry Advisory Group), the uncertainty of locating underground utilities costs the U.S. economy an average of USD 50 billion annually, with more than 1,500 injuries and nearly 400 deaths over the past 20 years. The uncertainty factor is a significant cause of highway construction delays due to missing or inaccurate information about underground utilities or mapping. These uncertainties of mapping utilities bolstered the growth of cutting-edge technology-based solutions in the region.

Utility Locator Industry Overview

The Utility Locator Market is moderately competitive and consists of several major players such as GSSI, Guideline Geo, Vivax-Metrotech, Emerson Electric, and many more. In terms of market share, few major players currently dominate the market. Players with a prominent share of the market focus on expanding their customer base globally. These companies are also leveraging strategic collaborative initiatives to increase their market share and profitability.

In January 2023, Leica Geosystems, part of Hexagon, launched their latest solution for excavation and utility professionals. The new launches, including the Leica DD175 utility locator and Leica DA175 signal transmitter, complement the company's existing Leica DD100 series and can help operators easily detect underground utilities to ensure the safety of site workers.

In October 2022, Radiodetection, a major provider of utility locating solutions, expanded its Ground Penetrating Radar (GPR) offerings with the introduction of LMX150 FINDAR, a compact resolution utility locating system that complements the company's traditional pipe and cable locators.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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