

Lead Service Line Replacement Global Market Report 2025 | Business Growth, Current and Future Trends till 2029

The Business Research Company's Lead Service Line Replacement Global Market Report 2025 – Market Size, Trends, And Global Forecast 2025-2034

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/EINPresswire.com/ -- How Much Is The [Lead Service Line Replacement Market](#) Worth?

The market size for lead service line replacement has experienced accelerated growth recently. The expected progression is from \$5.97 billion in 2024 to \$6.66 billion in 2025, with a compound annual growth rate (CAGR) of 11.6%. Factors leading to this growth in the historic period are

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increased public health awareness due to higher lead detections in community sampling, mandatory replacements due to consent decrees and enforcement actions, financial support for initial projects through drinking water state revolving fund loans and grants, issuance of municipal bonds for upgrading water lines, and collaboration with scheduled water main renewals and street reconstructions.

The market of replacing lead service lines is expected to experience a significant surge in the coming years, with an estimated worth of \$10.19 billion by 2029, alongside an

11.2% Compound Annual Growth Rate (CAGR). Several factors are driving this development during the forecast period, including the enhancement of lead and copper rules, compliance deadlines, the establishment of the bipartisan infrastructure law, dedicated funding pertaining to the replacement of lead service lines, allocation of state revolving funds for underprivileged communities, compulsory service line inventories and verification needs, and the prohibition of partial replacement across various jurisdictions. The forecast period will also witness prominent trends like the use of Geographic Information System (GIS) in asset mapping and priority



analytics, the employment of artificial intelligence and machine learning to predict service line material risks, innovations in vacuum excavation and daylighting equipment for safer potholing, advancements in trenchless replacement techniques like pipe pulling and pipe bursting, regulations for high-density polyethylene service tubing, and advancements in fusion joining.

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What Are The Factors Driving The Lead Service Line Replacement Market?

The lead service line replacement market is expected to grow due to the increased demand for proactive lead removal. This implies a systematic identification and full replacement of lead service lines on a scheduled basis to eliminate pre-existing lead sources before any exceedances or breakdowns. The surge in demand is attributed to the rise in state funding specific for lead service line replacements. Such replacements are critical for actively eradicating lead sources in drinking water networks, as they permanently dispose of the main route of lead contamination before exposure. To illustrate, in September 2025, the Environmental Protection Agency, an independent agency based in the US, reported that funding for lead-service-lines increased from \$71 million in 2022 to \$166 million in 2023, and this amount will be planned annually till 2026, indicating ongoing proactive replacement demand. Hence, the mounting demand for proactive lead removal is fueling the lead service line replacement market.

Who Are The Major Players In The Lead Service Line Replacement Market?

Major players in the Lead Service Line Replacement Global Market Report 2025 include:

- Veolia Environnement S.A.
- Quanta Services Inc.
- AECOM
- WSP Global Inc.
- Burns & McDonnell
- Xylem Inc.
- Core & Main Inc.
- Stantec Inc.
- Tetra Tech Inc.
- Arcadis NV

What Are The Key Trends Shaping The Lead Service Line Replacement Industry?

Key players in the lead service line replacement market are emphasizing technological enhancements like the application of the geographic information system (GIS) integrated with AI-driven planning tools for better management and monitoring of replacements at a large scale. The fusion of geographic information systems with machine learning assists in creating LCRI-compliant prioritization, enables picturization of risk and equity factors on maps, and aligns work planning with asset management systems. For example, BlueConduit, a water analytics company based in the United States, introduced LSL Replacements in January 2025, a software tool integrated with Esri facilitating data-driven decisions about prioritization, groupings by

neighborhood, and real-time tracking of lead service line replacement plans. The tool aids in deciding which areas to prioritize for replacement by using a weighted criteria like the presence of children and the Environmental Justice Index, and then directly manages and monitors replacements within Esri, offering seamless data transfers to asset management systems for execution and report generation. This focus on high-density regions and efficient program workflows from initial planning right through to progress dashboards helps to cut down costs per dwelling and boosts overall delivery efficacy.

Which Segment Accounted For The Largest Lead Service Line Replacement Market Share?
The lead service line replacement market covered in this report is segmented –

- 1) By Product Type: Full Lead Service Line Replacement, Partial Lead Service Line Replacement
- 2) By Service Type: Replacement, Repair, Maintenance
- 3) By Pipe Material: Copper, Plastic, Ductile Iron, Other Pipe Materials
- 4) By End-User: Residential, Commercial, Municipal, Industrial

Subsegments:

- 1) By Full Lead Service Line Replacement: Urban Infrastructure, Rural Infrastructure, Private Property Replacement, Public Property Replacement
- 2) By Partial Lead Service Line Replacement: Public-Side Replacement, Private-Side Replacement, Emergency Replacement, Temporary Bypass Replacement

View the full lead service line replacement market report:

<https://www.thebusinessresearchcompany.com/report/lead-service-line-replacement-global-market-report>

What Are The Regional Trends In The Lead Service Line Replacement Market?

In the Lead Service Line Replacement Global Market Report 2025, North America held the dominant position in the year 2024 and is projected to maintain its growth. The report comprehensively covers several regions including Asia-Pacific, Western Europe, Eastern Europe, North America, South America, the Middle East, and Africa.

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