

# U.S. Southeast Plumbing and Drain Care Market

*Market Overview and Investment Outlook*

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**Prepared by Rospex Holdings LLC**

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## Market Overview

The U.S. plumbing services market totaled approximately \$166.5 billion in 2024, growing modestly to an estimated \$169.8 billion in 2025 across roughly 132,000 businesses. The market is broadly defined to include large commercial and mechanical contractors; operators focused on residential and light commercial service and drain care represent a strategically distinct and more attractive sub-segment for platform building and acquisition-driven growth.

The Carolinas represent an estimated 3.5-4.4% of national plumbing services revenue, based on BLS workforce analysis, implying a combined market of approximately \$5.7-\$7.3 billion in 2024 for broad plumbing services. This is a conservative, bottoms-up estimate; the actual addressable market for service-focused operators is meaningfully defined by the density of residential and light commercial demand in high-growth metro markets.

## Segment Economics

The most important operational distinction in this market is between service and maintenance models - which offer recurring revenue, faster payment cycles, and strong margins - and installation and new construction models, which carry higher cyclicity and working capital requirements. A widely cited industry statistic indicates nonresidential construction accounts for just over two-thirds of total U.S. plumbing industry revenue, making residential service the minority of the broad market but the majority of the most attractive acquisition targets.

'Drain care' as a strategic focus functions as a high-value diagnostic entry point: camera inspection leads to repair and lining recommendations, generating higher-ticket follow-on revenue from relatively low initial dispatch costs. The strongest drain-care operators treat clearing as a diagnostic service, not a commodity, and build structured membership and maintenance programs on top of their reactive service base.

## Key Demand Drivers and Constraints

The Southeast benefits from sustained population in-migration, particularly in North Carolina and South Carolina, which consistently expands the installed residential plumbing base. Aging infrastructure in older residential and commercial properties drives non-discretionary repair and replacement demand. The primary constraint on growth is labor: BLS projects approximately 44,000 annual job openings nationally for plumbers through the early 2030s, with 4% employment growth from 2024 to 2034. Recruiting and retaining qualified technicians is the most significant operational bottleneck for virtually all operators in this market.

## Competitive Landscape and Investment Outlook

The Carolinas plumbing market is dominated by small, founder-owned independents with limited marketing infrastructure and no formal succession planning. National home services consolidators have been active in large coastal and Sunbelt markets but have not systematically entered secondary Carolinas markets, leaving a substantial acquisition opportunity at sub-premium multiples.

The most defensible platform strategy combines high-urgency residential service, membership programs, camera-to-repair drain care, and rapid bolt-on acquisitions in geographically proximate markets. Priority markets include Charlotte, Raleigh-Durham, Greenville-Spartanburg,

and Charleston. Key risks are technician labor availability, owner concentration at target businesses, and margin pressure from commercial-heavy revenue mix.

## Market Fragmentation and Competitive Structure - Carolinas

### Fragmentation Assessment

The plumbing services market in North Carolina and South Carolina is highly fragmented. BLS occupational data (May 2023 OEWS) reports 15,120 plumbers, pipefitters, and steamfitters employed in North Carolina and 4,010 in South Carolina. Translating employment to establishments using the national average of approximately 3-4 plumbers per firm implies approximately 3,800-5,000 active plumbing contractor businesses in North Carolina and approximately 1,000-1,300 in South Carolina - a combined 4,800-6,300 plumbing businesses across the two states. The residential service and drain care sub-segment represents an estimated 30-40% of that total (the balance being commercial, mechanical, and new construction specialists), implying approximately 1,400-2,500 operators directly relevant to a residential service platform.

Metric	Estimate
NC plumbers/pipefitters/steamfitters employed (BLS 2023)	15,120
SC plumbers/pipefitters/steamfitters employed (BLS 2023)	4,010
Estimated plumbing businesses, NC	~3,800-5,000
Estimated plumbing businesses, SC	~1,000-1,300
Combined NC+SC plumbing businesses	~4,800-6,300
Residential service/drain care focused (est. 30-40%)	~1,400-2,500 operators
Fragmentation level	Extreme - no regional dominant player in drain care

### Average Competitor Size

The typical Carolinas residential plumbing or drain care operator is a 2-5 technician owner-operated business generating \$500,000-\$2.5 million in annual revenue. BLS data showing average wages of approximately \$53,000 for plumbers in NC/SC, combined with typical revenue-per-technician ratios of \$150,000-\$300,000 depending on service mix, supports an average-firm revenue estimate of approximately \$750,000-\$1.5 million for single-location operators. Multi-location operators with \$3-\$10 million in revenue are relatively rare and represent an estimated 2-4% of the operator count.

### Largest Known Regional and National Competitors

Named competitors with meaningful presence in or directly relevant to the Carolinas plumbing and drain care market:

Company / Platform	Notes
<b>Roto-Rooter (Chemed Corp.)</b>	Largest national drain care and plumbing brand; franchise and company-owned locations; present in major Carolinas metros
<b>ARS / Rescue Rooter</b>	National multi-brand platform (HVAC + plumbing); significant NC/SC presence in Charlotte, Raleigh, and Greenville
<b>Mr. Rooter (Neighborly)</b>	Franchise-based national plumbing brand; active in NC/SC through franchise network
<b>Aire Serv / Benjamin Franklin Plumbing (Authority Brands)</b>	Franchise plumbing brand with Carolinas franchise locations
<b>Lee Company</b>	Large Southeast multi-trade contractor (HVAC, plumbing, electrical); Nashville-based with SC/NC commercial presence
<b>Minnick's / local PE-backed platforms</b>	Emerging regional roll-ups in Mid-Atlantic/Southeast; representative of consolidator type entering Carolinas
<b>Multi-location regional independents (\$1M-\$8M)</b>	Estimated 50-100 in NC+SC; highest-priority acquisition targets
<b>Owner-operated single-location firms</b>	~4,500-5,500 in NC+SC; dominant share of operator count

Note: No single plumbing or drain care operator holds dominant market share in the Carolinas. The national franchise brands have a presence primarily in the largest metros (Charlotte, Raleigh), leaving secondary markets - Greensboro, Wilmington, Greenville-Spartanburg, and the Charleston suburbs - largely uncontested by scaled operators.

*Full research report with detailed segmentation analysis, profitability benchmarks, competitive profiles, and complete citations available upon request from Rospex Holdings LLC.*

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