

Texas Triangle Sewer Inspection & Condition Assessment

Demand Brief

Municipal Intelligence Report | February 2026 | Prepared by MotionCount

Summary

Texas Triangle municipalities are executing major sewer rehabilitation, interceptor replacement, consent decree compliance, and system-wide condition assessment programs that create direct demand for CCTV inspection and AI-powered condition assessment. Houston is operating under EPA/TCEQ consent decrees driving continuous sewer cleaning, televising, and rehabilitation contracts totaling \$11M+ in active CCTV and rehab awards to Equix Integrity Southeast and Vortex Services. Austin is replacing a 72-inch wastewater interceptor along Williamson Creek (\$138.1M) and has a sole-source IBAK parts contract (\$515,915) confirming active CCTV inspection operations. Fort Worth is financing the \$709.5M Mary's Creek Water Reclamation Facility via a WIFIA loan and executing \$50M+ in sewer main replacements across multiple contracts. Dallas completed a Comprehensive Stormwater Assessment identifying \$8.73B in total capital needs across 1,886 miles of storm sewers. San Antonio purchased a custom televising inspection mobile unit (\$114,370) from Industrial Disposal Supply to increase annual footage inspection capacity. Below: project-level detail, assessment phase status, contractor and engineering firm intelligence, and inspection demand signals tracked at the agenda-item level.

Houston, TX

Houston operates under EPA and TCEQ consent decrees mandating reduction of sanitary sewer overflows. Active contracts for sewer cleaning, television inspection, and collection system rehabilitation create non-discretionary inspection demand. Multiple lift station rehabilitation projects are in land acquisition phase. Wastewater process unit cleaning contracts (\$13M+) have been completed across multiple facility districts.

Project / Contract	Value	Assessment Phase Status
Sewer Stoppage Cleaning & Television Inspection XI Equix Integrity Southeast, Inc. Citywide, 2-year + 1-year option	\$3,727,213	Active. Direct CCTV inspection contract. Consent decree compliance. Clears stoppages and inspects sewer lines to reduce SSOs. Subcontracts to CZ Construction and Cleanwave Solutions.
WW Collection System Rehab & Renewal Equix Integrity Southeast, Inc. Cleaning and TV inspection, citywide	\$1,286,769	Active. Sanitary sewer cleaning and television inspection to identify lines needing repair. Consent decree compliance. 730 calendar days.
WW Collection System Rehab & Renewal Vortex Services, LLC Point repairs and pipe bursting, citywide	\$6,059,711	Active. Rehabilitation of deteriorated sewer systems identified by inspection. Consent decree compliance. 730 calendar days.
Lift Station Rehab & Reconstruction Design Consent Decree Project Lockwood, South Point, Scott #3, Market St #2, MUD 067, Woodforest	Land acq. (prev. appropriated)	Pre-construction. Acquiring easements for 6 lift stations via eminent domain. Consent decree driven. Each station requires condition assessment prior to design.
Lift Station Rehab & Reconstruction FEMA-CD Woodland Ridge, Ben's Branch, Elmwood Hills, Trail River, Forest Shores, Riverlawn	Land acq. (prev. appropriated)	Pre-construction. Acquiring easements for 6 additional lift stations. FEMA and consent decree funded.

Project / Contract	Value	Assessment Phase Status
Gravity Sewer Line Adjustment Project Neighborhood sewer replacement and renewal	Land acq. (prev. appropriated)	Pre-construction. Land acquisition for sewer line adjustments. Condition assessment precedes replacement design.
Clarifier Maintenance, Repair & Replacement Brown & Root Industrial Services, LLC Extended through March 2027	\$27,304,828 (cumulative)	Active. Second amendment extending clarifier services at HPW facilities. 41.4% M/WBE participation.
Braeswood N, Post Oak #2, Bissonnet #4, Brooklet, NE Sludge Transfer, Synott Rd #1 Lift Stations Renewal & Replacement	Land acq. (prev. appropriated)	Pre-construction. Acquiring 2 parcels for lift station consolidation/diversion. Condition assessment required for each station.

Condition Assessment Signal: *Houston's consent decree creates the strongest non-discretionary inspection demand in the Texas Triangle. The Equix Integrity CCTV contracts (\$5M combined) are direct inspection buys. Vortex Services rehab (\$6.1M) depends on upstream inspection data. At least 18 lift stations are in rehab/reconstruction pipeline with land acquisition underway. Every lift station project requires condition assessment before design. The decree mandates ongoing system evaluation, creating a sustained inspection cycle. Track HPW procurement for next CCTV and rehab solicitations.*

Austin, TX

Austin Water is executing large-diameter interceptor replacements and neighborhood pipeline renewal projects. A sole-source IBAK parts contract confirms active CCTV inspection operations across the collection system. A proposed \$570M Watershed Protection bond would fund drainage and stormwater infrastructure through 2030+.

Project / Contract	Value	Assessment Phase Status
Williamson Creek WW Interceptor Project Williamson Creek Constructors JV 18,800 LF 72" gravity interceptor, trenchless	\$138,138,000	Construction authorized. Replaces deteriorated 36" and 42" segments. Trenchless (tunneling) methods. 1,372 calendar days. Biological odor control facility included.
Williamson Creek WW Interceptor Engineering CAS Consulting and Services, Inc. Construction phase services, specialty inspections	\$14,490,600	Active. Amendment adds \$7.4M for construction phase engineering and specialty inspections. Inspection services embedded in engineering scope.
Upper Harris Branch WW Interceptor Phase 1 S. J. Louis Construction of Texas, Ltd. 10,100 LF new WW lines, partial trenchless	\$20,695,911	Construction authorized. Provides gravity relief to Dessau WWTP. Enables abandonment of Dessau plant and lift stations. 800 calendar days.
IBAK Parts & Repairs for Sewer Inspection Industrial Disposal Supply Co., LLC Sole source, 3 years + two 1-year extensions	\$515,915	Active. Direct CCTV inspection signal. Sole authorized IBAK dealer in Texas. Maintains equipment for sanitary sewer collection system inspection. \$77,387/yr.
Merion Circle W/WW Pipeline Renewal Packsaddle Management, LLC 1,600 LF water + 1,100 LF WW main replacement	\$2,248,433	Construction authorized. Aging pipe replacement. 240 calendar days. Condition assessment preceded design.
Concordia Neighborhood W/WW Pipeline Renewal Arguijo Corporation 4,200 LF water + 2,500 LF WW pipe replacement	\$4,047,180	Construction authorized. 420 calendar days. Part of systematic neighborhood renewal program.

Project / Contract	Value	Assessment Phase Status
Brushy Creek Interceptor Expansion/Rehab Interlocal: Round Rock, Cedar Park, Leander Regional WW system, completion by FY2030	\$1,400,000 (Austin share)	Planning. Multi-city interceptor rehabilitation. Round Rock managing project. Condition assessment drives rehab scope.
Watershed Protection 2026 Bond Drainage & stormwater infrastructure 5 programs, named project list	\$569,970,000 (proposed)	Pre-bond. If approved, \$328M for drainage/stormwater infrastructure projects, \$50M stormwater resilience, \$36M asset management. Assessment demand follows.

Condition Assessment Signal: The IBAK sole-source contract is a direct inspection equipment signal confirming Austin Water operates CCTV inspection in-house. Industrial Disposal Supply Co. is the sole authorized IBAK dealer in Texas, making them a key vendor across the state. The Williamson Creek interceptor (\$138.1M) is the largest single wastewater construction contract in this brief. The 2026 bond proposal (\$570M) would generate significant downstream assessment demand if approved. Track bond election timing.

Fort Worth, TX

Fort Worth is executing the largest wastewater capital program in the Triangle outside Houston. The Mary's Creek Water Reclamation Facility (\$709.5M) is secured by a WIFIA loan closing in January 2026. Simultaneously, the city is running 5+ water and sanitary sewer main replacement contracts totaling \$50M+ and multiple sewer rehabilitation engineering agreements.

Project / Contract	Value	Assessment Phase Status
Mary's Creek Water Reclamation Facility WIFIA Loan + Revenue Bonds New facility, lift stations, force mains	\$709,500,900 (total project)	Financing closed Jan 2026. WIFIA loan \$383.1M (49%), revenue bonds 51%. Substantial completion Dec 2029. 29 parcels being acquired. Collection system assessment will follow to characterize inflow.
W/SS Replacement 2021 WSM-F Gra-Tex Utilities, Inc. 14,972 LF water + 5,975 LF sewer, CD 7 & 10	\$14,595,928	Contract authorized. Replaces cast iron water mains and deteriorated sewer mains. Includes storm drain improvements at Caylor Water Storage.
W/SS Replacement 2020 WSM-I Circle C Construction Company 15,910 LF water + 3,126 LF sewer, CD 3	\$9,476,730	Contract authorized. Cast iron water main and sewer replacement. Assessment preceded design.
W/SS Replacement 2019 WSM-L Part 1 Gra-Tex Utilities, Inc. 10,620 LF water + 4,150 LF sewer, CD 9 & 11	\$8,949,903	Contract authorized. Cast iron water and sewer replacement on Livingston Ave, Cleburne Rd, Stanley Ave, W. Berry St.
W/SS Replacement 2020 WSM-H Woody Contractors, Inc. 11,776 LF water + 3,718 LF sewer, CD 8	\$8,227,654	Contract authorized. Jefferson Ave, Richmond Ave, Baltimore Ave, Arlington Ave, Missouri Ave.
2022 Bond Year 3 Contract 13 2R Construction Services Inc. 4.19 lane miles, street/stormwater/W/SS, CD 5 & 11	\$8,179,909	Contract authorized. Combined paving, stormwater, and W/SS replacement. Replaces deteriorated water, sewer, and storm drains.
Sanitary Sewer Manhole Repair (Renewal) BCAC Underground LLC Citywide, epoxy coating and repairs	\$900,000 (renewal)	Active. First renewal of 2024 contract. Extends useful life of deteriorated manholes. Interior epoxy coatings. All council districts.
Marine Creek SS Parallel Interceptor Kimley-Horn and Associates, Inc. 36" water line, 48" siphon, engineering	\$2,494,205 (cumulative)	Design. Amendment adds 36" water line on 23rd St bridge, 48" siphon design, easement prep. CD 2, 8, 9.

Project / Contract	Value	Assessment Phase Status
Sanitary Sewer Rehab Contract 117 BDS Texas Corp. Engineering: Hampton, Weisenberg, Nichols St	\$437,229 (cumulative)	Design. Amendment adds water main replacement and sewer service rerouting design. CD 9.
Central City W/SS Relocations Kimley-Horn and Associates, Inc. USACE Rockwood Park, South Bypass Channel, University Dr	\$4,396,765 (cumulative)	Design. Water/sewer relocations for USACE flood control projects. TRV project eligible for TRWD reimbursement.

Condition Assessment Signal: Fort Worth's \$50M+ in active sewer replacement contracts represents the highest volume of pipe-in-the-ground sewer work in this brief. Each replacement contract requires pre-construction condition assessment to confirm defect locations and prioritize segments. The Mary's Creek WRF (\$709.5M) will drive collection system evaluation to characterize inflow to the new facility as it approaches completion in 2029. The BCAC Underground manhole repair contract confirms active inspection of manholes citywide. Track the next WSM contract cycle for upcoming assessment-to-construction demand.

Dallas, TX

Dallas completed a Comprehensive Stormwater Assessment identifying \$8.73B in total capital needs. The city operates 1,886 miles of storm sewers and 661 miles of creeks and channels. Active construction contracts address the Central Wastewater Treatment Plant headworks and primary clarifiers, plus water and wastewater main improvements at multiple locations.

Project / Contract	Value	Assessment Phase Status
Comprehensive Storm Drainage System Assessment (CSDSA) 1,886 miles storm sewers, 661 miles creeks 100-year storm standards	\$8,730,000,000 (total est. needs)	Assessment complete. 1.45% (24.6 miles) of large storm drains rated high risk. 2,633 structures and 56 miles of roadway flood-prone. 10 high-priority areas identified. Storm Drainage Relief Systems: \$7.3B.
Central WWTP Headworks & Primary Clarifiers BAR Constructors Inc. By-pass line, clarifier rehab, odor control repairs	\$51,854,806 (cumulative)	Construction. CO adds \$1.4M for bypass alignment, clarifier pipeline rehab, odor control repairs, junction box and manholes.
W/WW Main Improvements at 17 Locations Camino Construction, L.P. Multiple council districts	\$22,199,817 (cumulative)	Construction. \$880K increase for miscellaneous work at 17 locations. Water Construction Fund + Wastewater Construction Fund.
2024 Bond Program Prop A: Streets/Transportation Prop C: Flood Protection/Storm Drainage	\$521M (Prop A) \$52M (Prop C)	Active. 62 bond construction projects completed (\$37M+). 27 engineering firms selected for ~158 CIP projects. Prop C: erosion control awarded, storm drainage design in Mill Creek watershed.
Cockrell Hill Road Construction Urban Infraconstruction, LLC La Reunion Pkwy to Singleton Blvd	\$20,330,000	Authorized. Includes \$1.3M Water Construction and \$745K Wastewater Construction. Combined street and utility project.

Condition Assessment Signal: The CSDSA is the defining assessment event for Dallas. The \$8.73B in identified needs across 1,886 miles of storm sewers will drive phased inspection and rehabilitation for years. The 24.6 miles of high-risk large storm drains represent immediate assessment-to-rehab demand. The 2024 bond Proposition C (\$52M for flood/storm drainage) provides near-term capital backing. Track CIP prioritization and RFP cycle for storm drainage inspection and rehabilitation services.

San Antonio, TX

San Antonio's Public Works Department purchased a custom televising inspection mobile unit to increase sewer inspection capacity. The city is also processing two large MUD/PID creation consents for developments requiring significant wastewater infrastructure construction in the ETJ.

Project / Contract	Value	Assessment Phase Status
Custom Televising Inspection Mobile Unit Industrial Disposal Supply Company, LLC Sole brand, one-time purchase	\$114,370	Purchased. Deploys for sinkhole examination and street collapse investigation. Frees larger camera trucks for scheduled preventative maintenance. Increases annual footage inspection capacity.
Bexar County MUD No. 2 (Guajolote Ranch) ~1,160 acres, ~3,000 lots On-site WWTP, Edwards Aquifer Recharge Zone	\$150,000,000 (est. project cost)	Consent pending. 30-year development agreement. On-site WWTP with enhanced nutrient removal. 580 acres (50%) preserved as open space. Collection system to be built by developer.
Chasin Heights Special Improvement District 127 acres, 554 lots HLH Properties + Ya Baby LLC	\$24,000,000 (est. improvements)	Consent recommended. 30-year development agreement. Water, wastewater, drainage, and road improvements.

Condition Assessment Signal: The IDS televising unit purchase is a direct CCTV inspection equipment buy, confirming San Antonio is expanding in-house inspection capacity. IDS (Industrial Disposal Supply) appears twice in this brief (Austin IBAK contract, San Antonio mobile unit), establishing them as a key inspection equipment vendor across Texas. The MUD/PID developments represent future collection system buildout requiring inspection at acceptance.

Secondary Signals: Suburban & Satellite Cities

City	Activity	Assessment Relevance
Frisco	Stewart Creek WWTP Bank Stabilization design (Kimley-Horn). Professional services agreement for bid package preparation.	Low-medium. Bank stabilization may drive adjacent sewer condition assessment.
McKinney	Cotton Mill District infrastructure: \$13.6M MCDC grant + \$19.1M total Phase 1. Multiple annexations requiring developer-built water/sewer infrastructure.	Medium. \$19.1M infrastructure phase includes water and sewer. Inspection at handoff to city.
New Braunfels	Botanical Farm MUD: 250 acres, \$150M est. project cost. 45-year development agreement. GBRA wastewater service.	Low. New construction, not rehab. Inspection at acceptance.
Round Rock	Gattis School Rd Segment 2 engineering supplement (\$102K). Re-design of north storm drain trunk line for updated utility assignments.	Low. Storm drain redesign, not condition assessment.
Sugar Land	SWTP Rehabilitation Phase 2 design (\$427,576) with Ardurra Group, Inc.	Low-medium. Surface water treatment plant rehab, not collection system.

What This Means for Inspection & Condition Assessment

Consent decree compliance (Houston) is the strongest signal in this brief because it creates non-discretionary inspection demand that persists regardless of budget cycles, political turnover, or procurement delays. The Equix Integrity CCTV contracts and Vortex Services rehab contract are direct outputs of this mandate. Eighteen lift stations are in rehabilitation pipeline. As long as the decree is active, Houston buys inspection. That makes it a different kind of lead than a CIP project that can be deferred.

System-wide assessment (Dallas) is the largest scale signal. The CSDSA quantified \$8.73B in storm drainage needs across 1,886 miles. The 24.6 miles of high-risk large storm drains and 10 high-priority areas are the immediate targets. Proposition C (\$52M) provides initial capital backing. The stormwater rate increase trajectory (to \$13.76/month by FY30) confirms sustained revenue growth to fund assessment-to-construction cycles.

Large-diameter interceptor replacement (Austin) is in execution. The Williamson Creek 72-inch interceptor (\$138.1M) and Upper Harris Branch interceptor (\$20.7M) represent assessment-complete, construction-phase projects. The forward signal is the IBAK sole-source contract, which confirms ongoing CCTV operations, and the \$570M bond proposal, which would generate a new wave of assessment demand.

High-volume pipe replacement (Fort Worth) is the most active construction market. Five WSM contracts totaling \$50M+ are replacing cast iron water mains and deteriorated sewer across 56,000+ linear feet. Each contract requires pre-construction condition assessment. The Mary's Creek WRF (\$709.5M) will drive collection system evaluation as it nears completion in 2029.

Inspection equipment procurement (San Antonio, Austin) provides direct vendor intelligence. Industrial Disposal Supply Co. holds both the Austin IBAK parts contract and the San Antonio mobile unit purchase, confirming them as the dominant CCTV equipment vendor in the Texas Triangle.

Key Contractors & Firms in Sewer Assessment-Adjacent Work

Firm	City	Role	Value
Equix Integrity Southeast, Inc.	Houston	CCTV inspection, sewer cleaning, consent decree (2 contracts)	\$5,013,982

Firm	City	Role	Value
Vortex Services, LLC	Houston	WW collection system rehab, point repairs, pipe bursting	\$6,059,711
Williamson Creek Constructors JV	Austin	72" WW interceptor construction, trenchless	\$138,138,000
Industrial Disposal Supply Co., LLC	Austin, San Antonio	IBAK parts/repairs (Austin) + custom TV inspection unit (SA)	\$630,285
Gra-Tex Utilities, Inc.	Fort Worth	W/SS replacement (2 contracts, WSM-F and WSM-L)	\$23,545,831
BAR Constructors Inc.	Dallas	Central WWTP headworks and primary clarifiers	\$51,854,806
S. J. Louis Construction of Texas	Austin	Upper Harris Branch WW interceptor Phase 1	\$20,695,911
CAS Consulting and Services, Inc.	Austin	Williamson Creek interceptor engineering services	\$14,490,600
Brown & Root Industrial Services	Houston	Clarifier maintenance, repair, replacement	\$27,304,828
Kimley-Horn and Associates, Inc.	Fort Worth, Frisco	Marine Creek interceptor + Central City relocations + Stewart Creek	\$6,890,970
BCAC Underground LLC	Fort Worth	Sanitary sewer manhole repair, epoxy coating, citywide	\$900,000
Circle C Construction Company	Fort Worth	W/SS replacement 2020 WSM-I, 19,036 LF	\$9,476,730

These firms are either direct buyers of inspection technology (Equix, IDS), executors of assessment-dependent rehab (Vortex, Gra-Tex, BCAC Underground), or indicators of active inspection programs (IBAK sole-source, consent decree contractors).

This report was generated by MotionCount, a municipal intelligence platform that tracks and analyzes city council decisions across 100+ U.S. cities at matter-level depth. Data sourced from Austin, Dallas, Fort Worth, Frisco, Houston, McKinney, New Braunfels, Round Rock, San Antonio, and Sugar Land council proceedings, November 2025 through February 2026.

This brief represents a single snapshot. MotionCount tracks these signals continuously as projects move through committee, council, and procurement, so you see demand forming before the RFP hits the street.

Questions or want a custom brief for your territory? iban@motioncount.com