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Global Groundwater Collection and Sampling Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Groundwater Collection and Sampling market size is expected to reach $ 3405 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

Groundwater Collection and Sampling refers to professional field services that obtain representative groundwater samples from monitoring wells, observation wells, production or supply wells, piezometers, and temporary groundwater sampling points in accordance with regulatory requirements, project-specific sampling plans, and quality assurance procedures. The service typically covers well-condition verification, groundwater-level measurement, well purging or low-flow stabilization, measurement of field parameters such as pH, electrical conductivity, dissolved oxygen, oxidation-reduction potential, temperature and turbidity, sample collection using pumps, bailers, passive samplers or other validated methods, and subsequent preservation, labeling, field QA/QC, chain-of-custody management and compliant sample transportation. Groundwater Collection and Sampling is primarily used in contaminated-site investigation and remediation monitoring, industrial environmental compliance, landfill and waste-facility monitoring, mining and extractive projects, groundwater-source assessment, infrastructure baseline studies and emerging-contaminant investigations. The research focuses on commercial third-party field sampling services and the directly associated field execution and sample-management activities that convert groundwater conditions into defensible physical samples and field data for laboratory analysis, environmental assessment and regulatory decision-making.

Key Findings

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North America is the largest and most fragmented regional market for Groundwater Collection and Sampling

Laboratory-integrated sampling and environmental consulting-integrated sampling form the two principal commercial service models

Low-flow sampling, PFAS-related protocols and digital field data management are major service upgrade directions

Market Trends

Groundwater Collection and Sampling is evolving from conventional sample collection toward a more standardized, quality-controlled and digitally traceable field service. Low-flow sampling is increasingly important in monitoring-well programs because it can reduce disturbance, improve sample representativeness and lower the volume of purge water generated, while passive sampling provides an alternative for selected monitoring applications where site conditions and analytical objectives permit. Service providers are also reducing required sample volumes, improving pre-preserved container systems and integrating electronic field records, chain-of-custody workflows and laboratory data management to shorten the sample-to-result process. At the same time, PFAS and other emerging contaminants are raising requirements for equipment selection, contamination control, field blanks, sample handling and documentation. Continuous sensors can replace part of the manual work associated with water-level and basic water-quality measurements, but physical groundwater samples remain necessary for laboratory determination of many regulated and complex contaminants, supporting continued demand for defensible professional sampling services.

Market Dynamics

Drivers

Demand is primarily supported by recurring environmental compliance requirements and the need to characterize, monitor and manage groundwater contamination at industrial sites, contaminated properties, landfills, mines, waste facilities and groundwater-source systems. Emerging-contaminant regulation is adding another layer of demand. In the United States, the EPA continues to require monitoring and reporting under the PFAS drinking-water framework, with initial monitoring obligations remaining

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an important near-term activity; in Europe, updated rules that entered into force in 2026 strengthen monitoring and control of additional groundwater pollutants including certain PFAS; in China, HJ 164-2020 establishes technical requirements covering monitoring-point layout, monitoring wells, sample collection and preservation, quality assurance and quality control. These frameworks support recurring and technically demanding sampling programs rather than purely discretionary testing activity.

Restraints

The principal restraints are the labor-intensive and highly localized nature of field execution, mobilization costs, site-access constraints, variable monitoring-well conditions and the difficulty of standardizing project economics. Sampling programs differ materially in the number and depth of wells, sampling frequency, field parameters, contaminant classes, QA/QC requirements and travel requirements, limiting the ability of providers to achieve the same scale economics as centralized laboratory testing. In addition, groundwater sampling is frequently bundled with environmental consulting, laboratory analysis, drilling or remediation contracts, creating price transparency challenges and intensifying competition between integrated service providers and specialist field contractors. Greater deployment of automated groundwater-level and basic water-quality monitoring systems may also reduce some routine manual field activities, although these technologies do not replace laboratory-oriented physical sampling across most complex contaminant programs.

Opportunities

The strongest opportunities are associated with higher-value monitoring rather than simple increases in conventional sample counts. PFAS and other emerging contaminants require stricter contamination-control procedures and more defensible sample handling, creating opportunities for providers with specialized field protocols, accredited laboratory integration and strong QA/QC systems. Long-term remediation monitoring, landfill compliance, industrial environmental liability management and groundwater-source protection also provide recurring revenue opportunities. Providers can further increase customer value by combining sampling, field measurements, laboratory coordination, electronic chain-of-custody, environmental data management and interpretation into integrated workflows. Regulatory developments in the United States and Europe indicate that emerging-contaminant monitoring will remain an important source of specialized sampling requirements, while increasingly formalized groundwater monitoring practices in Asia-Pacific offer additional room for professional

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third-party services.

Challenges

A major industry challenge is maintaining sample integrity and data defensibility while controlling field-service costs. Cross-contamination, inappropriate sampling materials, inconsistent well purging, poor sample preservation or incomplete chain-of-custody documentation can undermine an entire monitoring program, and the risk becomes more significant when target analytes are present at very low concentrations. PFAS programs illustrate this challenge because materials commonly used in field equipment or personal items can become potential contamination sources. The industry also faces shortages of experienced field personnel, uneven regional accreditation requirements, fragmented local competition and pressure from customers to consolidate sampling, laboratory testing and reporting under fewer service providers. Consequently, scale alone does not guarantee competitiveness; providers must combine local field execution, technical protocols, safety systems, laboratory interfaces and reliable data management.

Value Chain Analysis

The value chain for Groundwater Collection and Sampling begins with sampling and monitoring equipment, well-access infrastructure, pumps and tubing, bailers and passive samplers, field meters, sample bottles, preservatives, PPE, calibration materials, coolers and logistics services. These inputs support the field-service stage, where project planning, site mobilization, well inspection, water-level measurement, purging or stabilization, sample collection, field parameter measurement, QA/QC execution, documentation and sample preservation are performed. Samples then move through controlled transportation and chain-of-custody processes to analytical laboratories, after which validated results can be integrated into environmental databases, compliance reports, risk assessments and remediation decisions.

Value creation is therefore concentrated less in the physical act of collecting water and more in obtaining representative and legally defensible samples efficiently. Skilled field labor, project management, mobilization, specialized QA/QC, sampling consumables and laboratory coordination represent important cost components. Laboratory-integrated providers can capture value across both field and analytical stages, while environmental consulting groups can extend value capture into site characterization, hydrogeology, risk assessment and remediation. Specialist sampling contractors remain

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competitive where local mobilization efficiency, technical expertise and rapid response outweigh the benefits of a fully integrated national or global network. Official service portfolios of major laboratory groups demonstrate the increasing integration of field sampling, groundwater monitoring and analytical services.

Segment Insights

By sampling method, low-flow purging and sampling has become an important route for contaminated-site and long-term monitoring programs, while conventional purge-and-sample, bailer or grab sampling, passive sampling and discrete-interval sampling remain relevant according to well construction, aquifer conditions, target contaminants and project requirements. The market should therefore be analyzed by technical suitability rather than assuming a single method will dominate every application. Passive sampling provides efficiency advantages in selected monitoring programs, but its applicability depends on analyte characteristics and site conditions, whereas low-flow approaches are well suited to many monitoring-well programs requiring controlled stabilization before collection.

By service scope, the market spans field sampling only, sampling combined with field measurement and QA/QC, sampling integrated with laboratory analysis, and broader monitoring or investigation programs. Sampling plus laboratory analysis represents an important commercial model among testing groups, while integrated monitoring and investigation programs are more prominent among environmental engineering and consulting firms. By application, contaminated-site investigation and remediation monitoring, industrial compliance, landfill and waste-facility monitoring and mining-related programs constitute the most established demand base, while emerging-contaminant investigations are raising service value and technical requirements. The recurring nature of compliance and remediation monitoring generally provides more stable service opportunities than one-time site investigations.

Downstream Market Opportunities

The most attractive downstream opportunities are concentrated in customers facing long-duration environmental liabilities or recurring groundwater compliance obligations. Industrial and manufacturing sites require defensible monitoring to demonstrate compliance and manage legacy contamination; landfill and waste operators depend on repeated monitoring to identify potential releases; mining and extractive industries require baseline and operational groundwater programs; property and infrastructure

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projects generate investigation demand when contamination risk is identified; and utilities and public-sector groundwater programs increasingly require technically rigorous sampling for emerging contaminants. PFAS is particularly important because sampling quality directly affects the credibility of analytical results at very low concentrations, increasing the value of trained personnel, controlled materials and documented QA/QC procedures.

Regional Insights

North America represents the largest and most fragmented regional market in this study, supported by a large installed base of industrial and contaminated sites, landfill and remediation monitoring programs, groundwater-source monitoring and a deep network of environmental laboratories, consultancies and specialist field contractors. The region combines large multinational providers with numerous state- and regional-level companies, making local mobilization and customer relationships important competitive factors. PFAS monitoring remains a significant source of technical demand, while the continued requirement for monitoring and reporting under the U.S. regulatory framework supports near-term field activity.

Europe has a comparatively strong combination of international testing groups, environmental consultancies and country-level specialist providers, with the 2026 update to EU water legislation reinforcing attention to PFAS and other groundwater pollutants. China has a large but more fragmented supply base consisting of national testing groups and numerous regional environmental monitoring organizations, while HJ 164-2020 provides a standardized technical foundation for groundwater sampling and quality control. Japan and Australia maintain established environmental and hydrogeological service capabilities, whereas South Korea, Taiwan, Southeast Asia, India, the Middle East and other emerging regional markets rely to varying degrees on global networks and local environmental testing companies. The most attractive incremental opportunities are expected where contaminated-site management, industrial compliance and professional third-party environmental monitoring continue to formalize.

Competitive Landscape Analysis

The competitive landscape is structurally fragmented and can be divided into two principal integrated models and a large regional specialist layer. Laboratory-led groups

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such as SGS, Eurofins, ALS and Pace Analytical combine groundwater field sampling with laboratory networks, sample logistics and analytical data delivery, giving them advantages in chain-of-custody control, laboratory utilization and multi-location customer programs. Environmental engineering and consulting groups such as WSP, Tetra Tech, AECOM, Stantec, Arcadis, ERM, GHD and Ramboll compete through broader contaminated-site, hydrogeological, monitoring and remediation capabilities, allowing groundwater sampling to be embedded within larger environmental programs. The core formal list contains 30 confirmed providers drawn from a broader 72-company research pool, while additional regional and specialist companies remain important because groundwater sampling requires local personnel, rapid mobilization and knowledge of regional requirements. As a result, consolidation can increase the reach of large networks, but the execution layer is expected to remain fragmented. Future differentiation will increasingly depend on specialized contaminant protocols, accredited field and laboratory integration, digital chain-of-custody, reliable field data capture and the ability to deliver defensible results across multi-site monitoring programs.

Report Scope

This report studies the global Groundwater Collection and Sampling demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Groundwater Collection and Sampling, and provides market size (US$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Groundwater Collection and Sampling that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Groundwater Collection and Sampling total market, 2021-2032, (USD Million)

Global Groundwater Collection and Sampling total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Groundwater Collection and Sampling total market, key domestic companies, and share, (USD Million)

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Global Groundwater Collection and Sampling revenue by player, revenue and market share 2021-2026, (USD Million)

Global Groundwater Collection and Sampling total market by Type, CAGR, 2021-2032, (USD Million)

Global Groundwater Collection and Sampling total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Groundwater Collection and Sampling market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include SGS SA, Eurofins Scientific SE, ALS Limited, Pace Analytical Services, LLC, WSP Global Inc., Tetra Tech, Inc., AECOM, Stantec Inc., Arcadis N.V., Intertek Group plc, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Groundwater Collection and Sampling market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), by player, by regions, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Groundwater Collection and Sampling Market, By Region:

United States

China

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Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Groundwater Collection and Sampling Market, Segmentation by Type:

Low-Flow Purging and Sampling

Conventional Purge-and-Sample

Grab Sampling

Passive Sampling

Others

Global Groundwater Collection and Sampling Market, Segmentation by Service Scope:

Field Sampling Only

Sampling + Field Measurement

Sampling + Laboratory Analysis

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Others

Global Groundwater Collection and Sampling Market, Segmentation by Sampling Point Type:

Monitoring Wells

Supply Wells

Observation Wells

Direct-Push Sampling Points

Others

Global Groundwater Collection and Sampling Market, Segmentation by Application:

Contaminated Site Investigation and Remediation Monitoring

Industrial Compliance Monitoring

Landfill and Waste Facility Monitoring

Others

Companies Profiled:

SGS SA

Eurofins Scientific SE

ALS Limited

Pace Analytical Services, LLC

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WSP Global Inc.

Tetra Tech, Inc.

AECOM

Stantec Inc.

Arcadis N.V.

Intertek Group plc

ERM

GHD Group Pty Ltd

Ramboll Group A/S

SLR Consulting Limited

RSK Group Limited

TRC Companies

Geosyntec Consultants, Inc.

Montrose Environmental Group, Inc.

AGROLAB GROUP

Normec Group

Apex Companies, LLC

HDR, Inc.

Centre Testing International Group Co., Ltd.

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Burns & McDonnell

GEI Consultants, Inc.

Roux Associates, Inc.

PONY Testing International Group Co., Ltd.

Kankyo Kanri Center Co., Ltd.

IDEA Consultants, Inc.

Senversa Pty Ltd

Key Questions Answered

1. How big is the global Groundwater Collection and Sampling market?
2. What is the demand of the global Groundwater Collection and Sampling market?
3. What is the year over year growth of the global Groundwater Collection and Sampling market?
4. What is the total value of the global Groundwater Collection and Sampling market?
5. Who are the Major Players in the global Groundwater Collection and Sampling market?
6. What are the growth factors driving the market demand?

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