

# **Gathering Pipeline Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented, By Type (Crude Oil Pipeline and Natural Gas), By Application (Onshore and Offshore), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Gathering Pipeline Market is projected to expand significantly, rising from USD 54.21 billion in 2025 to USD 69.71 billion by 2031, demonstrating a Compound Annual Growth Rate (CAGR) of 4.28%. This market encompasses the crucial network of low-pressure pipelines responsible for conveying crude oil and natural gas from individual wellheads to larger central processing facilities or main transmission lines. Serving as a vital upstream component in the energy supply chain, this sector consolidates hydrocarbons from numerous, often scattered, extraction points for subsequent processing.

A key impediment to this market's growth, however, lies in the rigorous regulatory environments and prolonged permitting processes. Environmental authorities worldwide are implementing stringent compliance measures aimed at reducing methane emissions and mitigating ecological impacts, which often lead to project delays and increased investment costs. The combination of these intricate regulatory requirements and growing public resistance to fossil fuel projects poses a considerable obstacle, potentially hindering the swift development and installation of new gathering pipeline infrastructure in critical production zones.

## **Market Driver**

A primary catalyst for the gathering pipeline market is the substantial increase in the production of unconventional shale gas and tight oil, as these resources demand much

denser gathering networks than traditional fields. Shale operators must continually drill new wells to counteract rapid decline rates, thereby requiring the ongoing installation of small-diameter pipelines to link newly established wellheads to central processing facilities. This intensive operational cycle ensures a consistent flow of projects for pipeline contractors, who are tasked with aggregating hydrocarbons from dispersed sites within high-producing basins.

Moreover, increasing global energy and electricity consumption fuels market growth by pressing the upstream sector to optimize the throughput capacity for both crude oil and natural gas. As industrialization and electrification advance, especially in developing economies, the efficient transportation of extracted resources from remote locations to transmission hubs becomes vital for ensuring energy security. This escalating demand necessitates significant capital expenditure on physical assets, with global upstream oil and gas investment projected to hit \$570 billion in 2024, underscoring the continuous funding for critical gathering pipeline infrastructure.

## **Market Challenge**

The Global Gathering Pipeline Market faces a significant obstacle due to stringent regulatory frameworks and prolonged permitting processes. Environmental agencies worldwide are imposing rigorous compliance standards to mitigate methane emissions, compelling operators to deploy sophisticated monitoring systems and observe strict ecological guidelines. These demands substantially lengthen project timelines, often delaying the rapid deployment of gathering lines needed to keep pace with drilling activities, primarily because of extensive environmental impact assessments and legal disputes. This mismatch between upstream production and midstream transport capacity leads to infrastructure bottlenecks, compelling producers to reduce output and impeding the physical expansion of gathering networks in vital basins.

Such regulatory delays have considerable economic repercussions, making capital deployment particularly challenging. A significant amount of infrastructure investment, projected at over \$34 billion in 2025, has been stalled by unpredictable federal review processes. This capital, rendered inaccessible by administrative hurdles, directly limits the industry's capacity to build essential pipelines for crude oil and natural gas transport. Consequently, operators are reluctant to initiate new gathering projects, concerned that evolving compliance requirements and indeterminate permitting schedules will undermine project feasibility and hinder overall market expansion.

## **Market Trends**

The integration of AI-driven predictive maintenance systems is fundamentally transforming gathering network operations, moving away from reactive repairs toward proactive asset management. Operators are increasingly implementing digital twin models and machine learning algorithms to process extensive datasets from sensor arrays, enabling them to foresee equipment malfunctions and corrosion fatigue before they interrupt operations. This technological shift is crucial for effectively managing the intricate, often remote, networks of small-diameter pipes found in unconventional basins, where manual inspections are economically unfeasible.

Concurrently, the adoption of advanced methane leak detection solutions has accelerated, as companies now aim beyond mere regulatory compliance to actively reduce product loss and environmental hazards. The industry is quickly embracing continuous monitoring technologies, such as satellite imagery, aerial drone inspections, and laser-based ground sensors, to pinpoint and seal fugitive emissions throughout widespread wellhead connections. This operational transformation is yielding tangible improvements in both infrastructure integrity and emissions management.

### **Key Market Players**

GAIL Limited

NOV Inc.

Engas UK Ltd

Welspun Living Limited

Phillips 66 Company

EITEP GmbH

Saipem S.p.A.

MRC Global Inc.

General Electric Company

Technip S.A.

## Report Scope

In this report, the Global Gathering Pipeline Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Gathering Pipeline Market, By Type

- Crude Oil Pipeline

- Natural Gas

### Gathering Pipeline Market, By Application

- Onshore

- Offshore

### Gathering Pipeline Market, By Region

- North America

  - United States

  - Canada

  - Mexico

- Europe

  - France

  - United Kingdom

  - Italy

  - Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Gathering Pipeline Market.

## **Available Customizations:**

Global Gathering Pipeline Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1. PRODUCT OVERVIEW**

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### **2. RESEARCH METHODOLOGY**

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### **3. EXECUTIVE SUMMARY**

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL GATHERING PIPELINE MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Crude Oil Pipeline, Natural Gas)
  - 5.2.2. By Application (Onshore, Offshore)
  - 5.2.3. By Region
  - 5.2.4. By Company (2025)

### 5.3. Market Map

## 6. NORTH AMERICA GATHERING PIPELINE MARKET OUTLOOK

### 6.1. Market Size & Forecast

#### 6.1.1. By Value

### 6.2. Market Share & Forecast

#### 6.2.1. By Type

#### 6.2.2. By Application

#### 6.2.3. By Country

### 6.3. North America: Country Analysis

#### 6.3.1. United States Gathering Pipeline Market Outlook

##### 6.3.1.1. Market Size & Forecast

###### 6.3.1.1.1. By Value

##### 6.3.1.2. Market Share & Forecast

###### 6.3.1.2.1. By Type

###### 6.3.1.2.2. By Application

#### 6.3.2. Canada Gathering Pipeline Market Outlook

##### 6.3.2.1. Market Size & Forecast

###### 6.3.2.1.1. By Value

##### 6.3.2.2. Market Share & Forecast

###### 6.3.2.2.1. By Type

###### 6.3.2.2.2. By Application

#### 6.3.3. Mexico Gathering Pipeline Market Outlook

##### 6.3.3.1. Market Size & Forecast

###### 6.3.3.1.1. By Value

##### 6.3.3.2. Market Share & Forecast

###### 6.3.3.2.1. By Type

###### 6.3.3.2.2. By Application

## 7. EUROPE GATHERING PIPELINE MARKET OUTLOOK

### 7.1. Market Size & Forecast

#### 7.1.1. By Value

### 7.2. Market Share & Forecast

#### 7.2.1. By Type

#### 7.2.2. By Application

#### 7.2.3. By Country

### 7.3. Europe: Country Analysis

- 7.3.1. Germany Gathering Pipeline Market Outlook
  - 7.3.1.1. Market Size & Forecast
    - 7.3.1.1.1. By Value
  - 7.3.1.2. Market Share & Forecast
    - 7.3.1.2.1. By Type
    - 7.3.1.2.2. By Application
- 7.3.2. France Gathering Pipeline Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Type
    - 7.3.2.2.2. By Application
- 7.3.3. United Kingdom Gathering Pipeline Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Type
    - 7.3.3.2.2. By Application
- 7.3.4. Italy Gathering Pipeline Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Type
    - 7.3.4.2.2. By Application
- 7.3.5. Spain Gathering Pipeline Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Type
    - 7.3.5.2.2. By Application

## **8. ASIA PACIFIC GATHERING PIPELINE MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast
  - 8.2.1. By Type
  - 8.2.2. By Application
  - 8.2.3. By Country

- 8.3. Asia Pacific: Country Analysis
  - 8.3.1. China Gathering Pipeline Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Type
      - 8.3.1.2.2. By Application
  - 8.3.2. India Gathering Pipeline Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Type
      - 8.3.2.2.2. By Application
  - 8.3.3. Japan Gathering Pipeline Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Type
      - 8.3.3.2.2. By Application
  - 8.3.4. South Korea Gathering Pipeline Market Outlook
    - 8.3.4.1. Market Size & Forecast
      - 8.3.4.1.1. By Value
    - 8.3.4.2. Market Share & Forecast
      - 8.3.4.2.1. By Type
      - 8.3.4.2.2. By Application
  - 8.3.5. Australia Gathering Pipeline Market Outlook
    - 8.3.5.1. Market Size & Forecast
      - 8.3.5.1.1. By Value
    - 8.3.5.2. Market Share & Forecast
      - 8.3.5.2.1. By Type
      - 8.3.5.2.2. By Application

## **9. MIDDLE EAST & AFRICA GATHERING PIPELINE MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Application

- 9.2.3. By Country
- 9.3. Middle East & Africa: Country Analysis
  - 9.3.1. Saudi Arabia Gathering Pipeline Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type
      - 9.3.1.2.2. By Application
  - 9.3.2. UAE Gathering Pipeline Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type
      - 9.3.2.2.2. By Application
  - 9.3.3. South Africa Gathering Pipeline Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Type
      - 9.3.3.2.2. By Application

## **10. SOUTH AMERICA GATHERING PIPELINE MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Type
  - 10.2.2. By Application
  - 10.2.3. By Country
- 10.3. South America: Country Analysis
  - 10.3.1. Brazil Gathering Pipeline Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Type
      - 10.3.1.2.2. By Application
  - 10.3.2. Colombia Gathering Pipeline Market Outlook
    - 10.3.2.1. Market Size & Forecast
      - 10.3.2.1.1. By Value

#### 10.3.2.2. Market Share & Forecast

##### 10.3.2.2.1. By Type

##### 10.3.2.2.2. By Application

#### 10.3.3. Argentina Gathering Pipeline Market Outlook

##### 10.3.3.1. Market Size & Forecast

##### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

##### 10.3.3.2.1. By Type

##### 10.3.3.2.2. By Application

## 11. MARKET DYNAMICS

### 11.1. Drivers

### 11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

### 12.1. Merger & Acquisition (If Any)

### 12.2. Product Launches (If Any)

### 12.3. Recent Developments

## 13. GLOBAL GATHERING PIPELINE MARKET: SWOT ANALYSIS

## 14. PORTER'S FIVE FORCES ANALYSIS

### 14.1. Competition in the Industry

### 14.2. Potential of New Entrants

### 14.3. Power of Suppliers

### 14.4. Power of Customers

### 14.5. Threat of Substitute Products

## 15. COMPETITIVE LANDSCAPE

### 15.1. GAIL Limited

#### 15.1.1. Business Overview

#### 15.1.2. Products & Services

#### 15.1.3. Recent Developments

#### 15.1.4. Key Personnel

#### 15.1.5. SWOT Analysis

- 15.2. NOV Inc.
- 15.3. Engas UK Ltd
- 15.4. Welspun Living Limited
- 15.5. Phillips 66 Company
- 15.6. EITEP GmbH
- 15.7. Saipem S.p.A.
- 15.8. MRC Global Inc.
- 15.9. General Electric Company
- 15.10. Technip S.A.

## **16. STRATEGIC RECOMMENDATIONS**

## **17. ABOUT US & DISCLAIMER**

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