

# **Pipeline Safety Market By Component [Solutions (Pipeline Monitoring System, Secure Communication, Perimeter Intrusion Detection, SCADA for Pipelines, and ICS Security) and Services]; By Technology (SCADA Systems, Intruder Detection System, Industrial Control Systems Security, Video Surveillance & GIS Mapping? and Pipeline Monitoring); By Vertical (Natural Gas, Crude Oil, Refined Products and Other); and Region – Global Analysis by Market Size, Share & Trends for 2014 – 2020 and Forecasts to 2030**

<https://marketpublishers.com/r/P730DA3A28CBEN.html>

Date: April 2022

Pages: 161

Price: US\$ 4,350.00 (Single User License)

ID: P730DA3A28CBEN

## **Abstracts**

### Product Overview

Pipelines are used around the country to move gas & liquid goods to different places and consumers over long distances. Such pipelines are known as a secure and efficient means of transporting dangerous goods over huge distances. Improper handling and distribution of these dangerous goods can, however, jeopardize human life and adversely affect the environment. The protection of pipelines can be defined as the array of responsibilities that relate to most or all pipelines. Under the department of homeland security (DHS), the transportation security administration is the lead agency for security & transport, including pipelines.

### Market Highlights

Pipeline Safety Market is expected to project a notable CAGR of 9.84% in 2030.

Pipeline Safety Market to surpass USD 16.95 billion by 2030 from USD 7.12 billion in

2019 at a CAGR of 9.84% throughout the forecast period, i.e., 2020-30. Market growth is also expected to be driven by improved investment by most oil and gas companies on pipeline infrastructure, network surveillance, leak detection, and the increase in the number of oil and gas leakage incidences/accidents. Over the forecast period, the global pipeline safety market is expected to see growth due to the growing requirement for monitoring and regulation of the fluid dynamics of existing pipelines across the industries of industrial manufacturing, transportation, electricity, and energy supply. Rising pipeline safety issues in the chemical and power generation industries are expected to boost market growth due to strict government regulations on hydrocarbon leakages.

#### Pipeline Safety Market: Segments

SCADA System segment to grow with the highest CAGR of 5.15% during 2020-30 Pipeline Safety Market is segmented by Technology as SCADA system, perimeter security/intruder detection system, video surveillance & GIS mapping, industrial control systems security, pipeline monitoring, and others. The larger market share in 2019 was accounted for by the industrial control systems security segment held the largest share of the Pipeline Safety market and this trend is projected to prevail during the forecast period. Over the past decade, SCADA software has experienced rapid growth. The SCADA framework allows workers in the end-user sector to evaluate the data and make strategic decisions from a remote location. It also helps to alleviate the problems of the Human Machine Interface (HMI) with fast response as it processes, distributes, and displays the data. The security forces or repair teams are instantly and efficiently warned by pipeline SCADA systems to identify various threats as well as leaks. It provides a specific approach for on-and-underground activity detection. The applications are primarily used for digging and leakage detection.

Natural Gas Segment to grow with the highest CAGR of 5.2% during 2020-30 Pipeline Safety Market is segmented vertical into natural gas, crude oil, refined products, and others. Natural gas is expected to hold the largest market share owing to the growing demand for natural gas in developing countries which in turn will lead to high demand for its safety solutions. Pipelines are known to be the fastest, most secure, and most effective means of transporting vast volumes of natural gas, crude oil, chemicals, and water through countries. Pipeline facilities are vital infrastructures of great value and significance, and a disruption to them can have a huge effect on meeting the needs of people and organizations and can harm the environment. In the future, demand for natural gas is projected to grow faster than the existing demand for coal or oil. This was predicted to comply with the carbon reduction goals set internationally to move towards an environmentally-friendly manufacturing sector. The

growing use of natural gas increases the demand for its pipeline protection.

## Pipeline Safety Market: Market Dynamics

### Drivers

#### Increased Spending of Oil & Gas Companies

As pipeline infrastructures are easily exposed to sabotage, illicit tapping, militant and terrorist actions, combined with leak detection and in-line equipment failure, the need to track oil, gas, and refined products have increased. Due to the increase in demand for oil and gas in most major nations, there has been a substantial increase in pipeline infrastructure. For thousands of miles, pipelines are laid through various regions to move and distribute oil and gas products. The demand for pipeline protection, monitoring, and leakage detection has been increased by these large networks of pipelines. To track the pipeline system, pipeline companies are introducing sensors and advanced control systems to detect leakages. In the coming years, this rises in pipeline infrastructure would create a lucrative demand for monitoring system vendors.

#### Growing Worldwide Demand for Natural Gas

The key factor contributing to the growth of the pipeline safety market is the rising investment made in the oil and gas industry, along with the expansion of infrastructure, which triggers the demand for pipes used for the transport of dangerous goods, which in turn would increase the demand for pipeline safety. Growing concerns about the safety of pipelines in the power generation and chemical industries are pushing the demand to expand further in the years ahead. Increased cases of chemical and gas leakage, increased instances of natural calamities affecting the pipeline, and rising terrorist attacks are the other factors that are positively improving the pipeline safety sector.

### Restrain

#### High Implementation and Maintenance Costs

The cost of pipeline protection and leak detection system implementation for oil and gas varies with technology. System design, integration & consultancy, and maintenance and service support are the other factors restricting the growth of the pipeline safety market. The above-mentioned prices show that the cost of monitoring and leak detection systems is high. These payments exclude implementation and maintenance and are primarily based on the industry's technical improvements and development. As a result, one of the main limiting factors is the cost factor for oil and gas monitoring and leak detection systems.

## Pipeline Safety Market: Key Players

### ABB (Switzerland)

Company Overview, Business Strategy, Key Product Offerings, Financial Performance, Key Performance Indicators, Risk Analysis, Recent Development, Regional Presence, and SWOT Analysis.

Honeywell International Inc.

General Electric Company

ABB Ltd.

Rockwell Automation, Inc.

Siemens AG

Schneider Electric S.E.

Optasense Ltd.

Senstar Corporation

Huawei Technologies USA, Inc.

ESRI Inc.

Thales SA

Pipeline Safety Market: Regions

Pipeline Safety Market is segmented based on regional analysis into five major regions. These include North America, Latin America, Europe, APAC, and MENA.

Pipeline Safety Market in Europe held the largest market share of XX.X% in the year 2019. The growing investment in oil and gas is contributing significantly to the growth of the region's pipeline protection industry. The European Union (EU) is highly dependent on external supplies of natural gas and in the past has undergone significant gas cuts, caused mainly by the technical difficulty and political uncertainty of the high-pressure natural gas system in some of the supplying countries. Asia Pacific is becoming a highly prospective market with growing awareness of the increase in business efficiency, augmented by competently built pipeline safety platforms provided by suppliers in this area. Emerging economies, such as India, China, and Japan, compose the region. With the substantial increase in the construction of pipelines across China, Pakistan, and India, the need for robust security measures to be deployed has increased significantly. Safety issues about pipeline attacks and damage caused by natural disasters and piracy are the region's key concerns.

Competitive Landscape:

Pipeline Safety market, which is highly competitive, consists of several major players such as ABB (Switzerland), Siemens AG (Germany), Schneider Electric (France) hold a substantial market share in the Pipeline Safety market. Other players analyzed in this report are Baker Hughes (US), Honeywell (US), Huawei Technologies (China), AVEVA (UK), PSI AG (Germany), BAE Systems (UK), TransCanada (Canada), Atmos

International (UK), Clamp-on AS (Norway), FFT (Australia), Perma-Pipe (US), Senstar (Canada), Syrinx (UK), RADIOBARRIER (Russia), Pure Technologies (Canada), C-Fer Technologies (Canada), Total Safety (US), Krohne Group (Germany), PLM CAT (US), Leather (Ukraine), and TTK (France) among others.

The market competition has been stepped up by the availability of many players offering Pipeline Safety. In August 2020, Honeywell UOP will provide PetroChina, a petrochemical company, with various solutions and technologies. Honeywell would offer technology licenses, engineering design, key equipment, operator training sessions, and technical services for startup and efficient operation.

Pipeline Safety Market is further segmented by region into:

North America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United States and Canada

Latin America Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – Mexico, Argentina, Brazil, and Rest of Latin America

Europe Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – United Kingdom, France, Germany, Italy, Spain, Belgium, Hungary, Luxembourg, Netherlands, Poland, NORDIC, Russia, Turkey, and Rest of Europe

APAC Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – India, China, South Korea, Japan, Malaysia, Indonesia, New Zealand, Australia, and Rest of APAC

MENA Market Size, Share, Trends, Opportunities, Y-o-Y Growth, CAGR – North Africa, Israel, GCC, South Africa, and Rest of MENA

Pipeline Safety Market report also contains analysis on:

Pipeline Safety Market Segments:

By Component:

Solutions

Services

Pipeline Integrity Management

Professional Services

Risk Management

Engineering and Consulting

By Technology:

SCADA System

Perimeter Security/Intruder Detection System

Industrial Control Systems Security

Video Surveillance & GIS Mapping

Pipeline Monitoring

Other Technology and Solutions

By Vertical:

Natural Gas

Crude Oil

Refined Products

Other

Pipeline Safety Market Dynamics

Pipeline Safety Market Size

Supply & Demand

Current Trends/Issues/Challenges

Competition & Companies Involved in the Market

Value Chain of the Market

Market Drivers and Restraints

FAQs on Pipeline Safety Market

Which segment is anticipated to hold the largest market share?

At what CAGR is the market anticipated to grow between 2020 and 2030?

Who are the key players in the Pipeline Safety Market?

What could be the challenging factors in the growth of Pipeline Safety Market?

What are the growth drivers for the Pipeline Safety Market?

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**9. HUAWEI TECHNOLOGIES USA, INC.**

**10. ESRI INC.**

**11. THALES SA**

Consultant Recommendation

\*\*The above-given segmentations and companies could be subjected to further modification based on in-depth feasibility studies conducted for the final deliverable.

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