

Flare Monitoring Market by Mounting Method (In Process-Mass Spectrometers, Gas Chromatographs, Gas Analyzers; Remote-IR Imagers, MSIR Imagers), Industry (Refineries, Petrochemical, Onshore Oil & Gas Production Sites), & Geography - Global Forecast to 2023

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Abstracts

“The flare monitoring market is estimated to grow at a CAGR of 8.24% during 2018–2023”

The flare monitoring market is estimated to grow from USD 842.3 million in 2018 to USD 1,251.7 million by 2023, at a CAGR of 8.24% between 2018 and 2023. The factors that drive the growth of the flare monitoring market include stringency in environmental regulations leading to growing need for controlling waste gas combustion parameters, benefits offered by remote flare monitoring systems, and steady expansion of oil, gas, and petrochemicals industries across the world. The growing demand from major oil and gas producing countries across the Middle East and Africa and major oil refining countries in Asia Pacific and Europe are offering new growth opportunities to the players in the flare monitoring market. However, shifting focus of many countries toward the elimination of flaring and rising popularity of associated waste gas recovery systems in developed countries across North America and Europe are expected to hinder the long-term growth of the market for certain flare monitoring systems, especially devices based on remote mounting technologies.

“In-process mounting method held a larger market share in 2017”

The in-process mounting method held a larger market share in 2017 and is further

expected to lead the market (in terms of value) between 2018 and 2023. Rising demand from expanding crude and shale oil production, discovery of new oil fields, and continuous demand from refineries will further give substantial impetus to in-process flare monitoring market. However, the market for the remote mounting method is expected to witness a higher growth rate. Remote monitoring devices, due to the absence of any contact with harsh and corrosive flare vent gases, are comparatively easy to install and maintain, easy to integrate with other systems, can offer quick analysis of data, and are economical flare stack monitoring solutions (due to reduced operational and maintenance costs) than conventional in-process methods.

“Refineries and petrochemical to hold larger market shares”

Refineries and petrochemicals were the key industries (in terms of market shares) in the global flare monitoring market in 2017. Refineries is the major industry vertical holding major market shares of in-process and remote flare monitoring devices and systems. However, the flare monitoring market across onshore oil and gas production sites is estimated to grow at the highest CAGR during the forecast period. The growing strictness from regional, national, and international environmental jurisdictions to reduce emissions of harmful VOCs and other pollutants right from the extraction to production of oil and gas is expected to boost the flare monitoring market growth across upstream, i.e., both onshore as well as offshore oil and gas production sites in the nearest future.

“North America accounted for a major market share in 2017”

North America accounted for the largest share of the flare monitoring market in 2017, while market across Rest of the World is estimated to grow at the highest CAGR between 2018 and 2023. The growing number of drilling activities and shale gas exploration, and strict requirements for the installation of flare monitoring devices are expected to drive the North American market growth. The highest growth rate of the RoW region is due to the rapid expansion of oil production facilities, oil refineries, gas production plants, and gas flaring activities across major countries in the Middle East, especially Saudi Arabia, the UAE, Iraq, Iran, and Kuwait; and the shifting focus of countries in the RoW region toward harmful waste-gas emission reductions.

In the process of determining and verifying the market size for several segments and subsegments gathered through the secondary research, extensive primary interviews have been conducted with key industry experts in the flare monitoring markets. The break-up of primary participants for the report has been shown below:

By Company Type: Tier 1 = 52%, Tier 2= 28%, and Tier 3 = 20%

By Designation: C-level Executives = 41%, Directors = 38%, and Others = 21%

By Region: North America = 40%, Europe = 33%, Asia Pacific = 22%, and RoW = 5%

The report profiles the key players in the flare monitoring market, along with their ranking analysis. The prominent players profiled in this report are Siemens (Germany), ABB (Switzerland), FLIR Systems (US), Thermo Fisher Scientific (US), Honeywell (US), John Zink Company, LLC (US), LumaSense Technologies Inc. (US), Zeeco, Inc. (US), MKS Instruments (US), Land Instruments International Ltd. (UK), Eaton HERNIS Scan Systems AS (Norway), Fluenta (UK), Williamson Corporation (US), Extrel CMS, LLC (Pennsylvania, US), Providence Photonics LLC (US), Powertrol Inc. (US), and TKH Security Solutions (Netherlands).

Research Coverage:

This research report categorizes the global flare monitoring market on the basis of mounting method, industry, and geography. The report describes market dynamics that include key drivers, restraints, challenges, and opportunities for the flare monitoring market and forecasts the same till 2023.

The report would help leaders/new entrants in this market in the following ways:

1. This report segments the flare monitoring market comprehensively and provides the closest market size projection for all subsegments across different regions.
2. The report helps stakeholders understand the pulse of the market and provides them with the information on key drivers, restraints, challenges, and opportunities pertaining to the market.
3. This report would help stakeholders understand their competitors better and gain more insights to improve their position in the business. The competitive landscape section includes competitor ecosystem, product developments and launches, partnerships, and mergers and acquisitions.

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According to the market research report "Flare Monitoring Market by Mounting Method (In Process-Mass Spectrometers, Gas Chromatographs, Gas Analyzers; Remote-IR Imagers, MSIR Imagers), Industry (Refineries, Petrochemical, Onshore Oil & Gas Production Sites), & Geography - Global Forecast to 2023", the flare monitoring market is estimated to grow from USD 842.3 Million in 2018 to USD 1,251.7 Million by 2023, at a CAGR of 8.24% between 2018 and 2023. The growth of the market is driven by the growing strictness from regional, national, and international environmental jurisdictions imposed on end-user industries to reduce emissions of harmful pollutants and improve combustion efficiency; benefits offered by direct flare monitoring systems; and steady expansion of oil, gas, and petrochemicals industries worldwide.

Major players in the global flare monitoring market include:

Siemens (Germany),

ABB (Switzerland),

FLIR Systems (US),

Thermo Fisher Scientific (US),

Honeywell (US),

John Zink Company, LLC (US),

LumaSense Technologies Inc. (US),

Zeeco, Inc. (US),

MKS Instruments (US),

Land Instruments International Ltd. (UK),

Eaton HERNIS Scan Systems AS (Norway),

Fluenta (UK), Williamson Corporation (US),

Extrel CMS, LLC (Pennsylvania, US),

Providence Photonics LLC (US),

Powertrol Inc. (US), and

TKH Security Solutions (Netherlands).

The market for the remote mounting flare monitoring systems is expected to grow at a higher CAGR during forecast period

The market for the remote mounting method is expected to witness the highest CAGR between 2018 and 2023. Remote monitoring devices, due to the absence of any contact with harsh and corrosive flare vent gases, are comparatively easy to install and maintain, easy to integrate with other systems, can offer quick analysis of data, and are economical flare stack monitoring solutions (due to reduced operational and maintenance costs) than conventional in-process monitoring methods. Ease of process monitoring, lesser price compared to in-process technologies, and compliance with most of the environmental norms are some other key driving factors for the remote flare monitoring market growth.

Refineries held the largest share of the flare monitoring market in 2017

The oil and gas industry (comprising onshore oil and gas production sites, refineries, and petrochemicals) together accounted for over 95% of the global flare monitoring market in 2017. Refineries is the major vertical holding a major market share of the market for in-process and remote flare monitoring devices and systems. However, the flare monitoring market across onshore oil and gas production sites is estimated to grow at the highest rate because a major composition (over 85%) of worldwide gas flaring is done across upstream activities. The growing strictness from regional, national, and international environmental jurisdictions to reduce emissions of harmful VOCs and other pollutants right from the extraction and production of oil and gas is expected to boost the demand for flare monitoring systems across the upstream sector, i.e., both onshore as well as offshore oil and gas production sites in the near future.

North America held the largest share of the flare monitoring market in 2017

North America accounted for the largest share of the market in 2017, followed by Europe and Asia Pacific, respectively, of the flare monitoring market. The market across North America is highly matured and is undergoing a pragmatic shift toward the installation of flare monitoring devices, especially for in-process flare monitoring devices, majorly across refineries. However, the RoW and Asia Pacific regions are expected to grow at the highest and second-highest rates, respectively, during the forecast period. Growing investments for the expansion of upstream and midstream oil and gas industries in countries across these regions, and shifting focus of these countries toward the global phenomenon of harmful waste-gas emission reductions are the primary factors supporting the growth across these regions.

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