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Hazardous Area Equipment Market Forecasts to 2032 – Global Analysis By Product (Cable Glands & Accessories, Measurement Devices, Control & Automation Products, Power Supply Systems, Alarm & Signaling Systems, Electric Motors, Lighting Products, Surveillance Systems, Barrier & Enclosure Products and Display Products), Connectivity, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Hazardous Area Equipment Market is accounted for $12.27 billion in 2025 and is expected to reach $21.17 billion by 2032 growing at a CAGR of 8.1% during the forecast period. Hazardous area equipment refers to specialized electrical and mechanical devices designed for safe operation in environments where flammable gases, vapors, dust, or fibers may be present, creating a risk of explosion or fire. These fields, which are frequently found in sectors like mining, oil and gas, chemical processing, and pharmaceuticals, call for equipment that conforms to strict safety regulations like ATEX, IECEx, or UL. Gas detection systems, flameproof lighting, intrinsically safe devices, and explosion-proof enclosures are examples of equipment used in hazardous areas. Moreover, operational safety and regulatory compliance are ensured by their design, which makes sure they either contain potential ignition sources or cannot ignite a hazardous atmosphere.

According to the U.S. National Fire Protection Association (NFPA), key standards like NFPA 497 (for flammable gases/vapors) and NFPA 499 (for combustible dusts) provide essential guidelines for classifying hazardous zones and defining requirements for electrical equipment used in those areas.

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Market Dynamics:

Driver:

Growing exploration activities for oil and gas

The growing demand for energy around the world, particularly from developing nations, has greatly increased oil and gas exploration and production. This sector works in hazardous settings like refineries, onshore rigs, and offshore platforms, where flammable gases and vapors present a continual risk of explosion. Equipment such as motors, control panels, and inherently safe and explosion-proof lighting systems are becoming more and more necessary in order to reduce these risks. Additionally, the need for strong hazardous area solutions that guarantee both safety and operational continuity in harsh circumstances is growing as governments and energy companies invest in deeper and more remote extraction zones.

Restraint:

Expensive equipment for hazardous areas

The high cost of hazardous area equipment is one of the biggest barriers to market expansion. Strict international standards like ATEX, IECEx, and UL require these devices to pass extensive testing, certification, and engineering. Because of this, their cost is significantly higher than that of typical industrial equipment. Small and medium-sized businesses (SMEs) may find it difficult to set aside the required funds for compliant equipment, particularly in emerging economies. Furthermore, in addition to the initial purchase price, the total cost of ownership also includes installation, routine maintenance, inspections, and certification renewals.

Opportunity:

Transition to a hydrogen economy and clean energy

A new set of opportunities and challenges is brought about by the global transition to clean energy sources like hydrogen, biofuels, and green chemicals. Because it is extremely flammable, hydrogen in particular needs to be handled, stored, and processed with specialized equipment, frequently in areas designated as hazardous. The need for certified hazardous area equipment such as pressure switches, gas

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sensors, valves, and enclosures will increase as nations invest in hydrogen infrastructure, including production facilities and refueling stations. Moreover, this change is increasing the addressable market by creating new uses for explosion-protected equipment in energy storage, renewable energy integration, and sustainable fuel production.

Threat:

Market saturation and fierce price competition

The market for hazardous area equipment is becoming more competitive as it ages, especially in developed areas like Western Europe and North America, where both new and established players are becoming more prevalent. Particularly in commoditized product categories like lighting systems and explosion-proof enclosures, this fierce competition has resulted in price pressure. Although lower prices benefit consumers, manufacturers' profit margins are squeezed; this restricts their capacity to spend on R&D, innovation, and post-purchase services. Furthermore, smaller businesses may find it difficult to hold onto market share as big end users combine suppliers to cut costs, which could force them out of business or induce mergers and acquisitions.

Covid-19 Impact:

The COVID-19 pandemic affected the market for hazardous area equipment in a variety of ways. The market was severely disrupted in its early phases by manufacturing delays, global supply chain failures, and the suspension of industrial and construction projects in important industries like mining, chemicals, and oil and gas. New equipment deployments and certifications were delayed as a result of lockdowns and labour shortages that further hampered installation and maintenance operations. But there was a renewed emphasis on workplace safety, automation, and remote monitoring in dangerous areas as industries progressively resumed operations under more stringent safety and monitoring procedures.

The wired connectivity segment is expected to be the largest during the forecast period

The wired connectivity segment is expected to account for the largest market share during the forecast period. Its dominance is ascribed to its dependability, signal stability, and immunity to interference in hazardous industrial settings like mining, oil and gas, and chemical processing. Because of their established safety performance and adherence to international standards like ATEX and IECEx, wired systems—including

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Ethernet and fieldbus—are frequently used to connect sensors, controllers, and monitoring equipment in hazardous zones. Moreover, wired networks are the recommended option for crucial operations because they are less vulnerable to signal deterioration brought on by physical barriers or electromagnetic interference than wireless solutions.

The pharmaceutical segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the pharmaceutical segment is predicted to witness the highest growth rate. because settings involving volatile chemicals and solvents are increasingly in need of equipment that is both intrinsically safe and explosion-proof. As the demand for biologics, vaccines, and specialty medications increases globally, production facilities are growing and implementing cutting-edge safety measures. Cleanrooms, production lines, and quality labs are investing in certified equipment due to regulatory compliance with cGMP, ATEX, and IECEx standards. Furthermore, driving the need for superior electrical and electronic safety equipment is the industry's move toward automation, real-time monitoring, and contamination control in hazardous areas.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, propelled by its highly regulated industrial environment, sophisticated adoption of technology, and robust presence of important industries like mining, chemicals, oil and gas, and pharmaceuticals. Strict adherence to safety regulations such as NEC, OSHA, and UL, which require the use of certified explosion-proof and intrinsically safe equipment in hazardous areas, benefits the area. Because of continuous investments in offshore drilling, shale gas extraction, and industrial automation, the US leads the world in this regard. Moreover, North America's market dominance is reinforced by the existence of significant market players and robust infrastructure.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by accelerating urbanization, industrialization, and rising investments in vital industries like power generation, chemicals, oil and gas, and pharmaceuticals. Stricter regulatory compliance, infrastructure modernization, and a greater emphasis on worker safety are all occurring in nations like China, India, Indonesia, and Vietnam. The

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need for equipment that is intrinsically safe and explosion-proof is also being increased by the growth of multinational manufacturing facilities in the area and an increase in foreign direct investment. Additionally, government-sponsored industrial safety initiatives and the drive toward automation are driving market expansion throughout Asia-Pacific.

Key players in the market

Some of the key players in Hazardous Area Equipment Market include Emerson Electric Co., Honeywell International, Inc., NHP Electrical Engineering Products Pty Ltd, Patlite Corporation, ABB Ltd., E2S Warning Signals Inc, Rockwell Automation, Inc., Federal Signal Corporation, CZ Electric Co., Peli BioTech Inc, Siemens AG, Eaton Corporation , Werma Signaltechnik GmbH + Co. KG, R. Stahl AG and Pepperl+Fuchs Inc.

Key Developments:

In January 2025, Emerson Electric Co. has entered into a definitive Agreement and Plan of Merger with Aspen Technology, Inc., a Delaware corporation, and Emersub CXV, Inc., a wholly-owned subsidiary of Emerson. This strategic move is set to bolster Emerson's market presence and expand its technological capabilities. Under the terms of the Merger Agreement, Emersub CXV, Inc. will initiate a tender offer to acquire all outstanding shares of AspenTech's common stock at a price of $265 per share in cash.

In December 2024, Honeywell announced the signing of a strategic agreement with Bombardier, a global leader in aviation and manufacturer of world-class business jets, to provide advanced technology for current and future Bombardier aircraft in avionics, propulsion and satellite communications technologies. The collaboration will advance new technology to enable a host of high-value upgrades for the installed Bombardier operator base, as well as lay innovative foundations for future aircraft.

In December 2024, ABB has agreed to acquire the power electronics unit of Gamesa Electric in Spain from Siemens Gamesa, to boost its position in the renewable power conversion technology market, the Swiss engineering group. The transaction is expected to close in the second half of 2025.

Products Covered:

Cable Glands & Accessories

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- Measurement Devices
- Control & Automation Products
- Power Supply Systems
- Alarm & Signaling Systems
- Electric Motors
- Lighting Products
- Surveillance Systems
- Barrier & Enclosure Products
- Display Products

Connectivities Covered:

- Wired Connectivity
- Wireless Connectivity

End Users Covered:

- Oil & Gas
- Chemical
- Pharmaceuticals
- Food & Beverages
- Energy & Power Generation
- Mining & Metal

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- Pulp & Paper
- Water & Wastewater Treatment
- Transportation
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China

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India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment

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Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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