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Infrastructure Monitoring Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Component (Hardware, Software, Services), By Technology(Wired, Wireless), By Application (Corrosion Monitoring, Crack Detection, Damage Detection, Vibration Monitoring, Thermal Monitoring, Multimodal Sensing, Strain Monitoring, Others), By Vertical (Oil & Gas, Manufacturing, Aerospace and Defense, Construction, Automotive, Power Generation, Others), By Region, By Competition , 2018-2028

https://marketpublishers.com/r/I9CF516CE28FEN.html
Date: October 2023
Pages: 180
Price: US$ 4,900.00 (Single User License)
ID: I9CF516CE28FEN

Abstracts

Global Infrastructure Monitoring Market has valued at USD 4.3 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 12% through 2028. The Global Infrastructure Monitoring Market is experiencing substantial growth driven by the increasing importance of monitoring critical infrastructure assets. As nations around the world invest in the development and maintenance of their infrastructure, there is a growing need to ensure the reliability, safety, and efficiency of these assets. Infrastructure monitoring involves the real-time assessment of various elements such as bridges, dams, roads, pipelines, and buildings using advanced sensor technologies, data analytics, and remote sensing techniques. This data-driven approach allows for early detection of structural issues, potential failures, or performance deviations, enabling timely intervention and preventive maintenance. Additionally, the rise of smart cities and the integration of the Internet of Things (IoT) in infrastructure systems further fuels the demand for monitoring solutions. The ability to optimize asset

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management, reduce downtime, and enhance public safety are key drivers of the Infrastructure Monitoring Market. As a result, companies specializing in infrastructure monitoring technologies and services are poised for significant opportunities in the coming years.

Key Market Drivers

Enhanced Infrastructure Monitoring Efficiency

AI-enabled infrastructure monitoring is revolutionizing the way critical assets and infrastructure are managed by automating labor-intensive tasks, enabling experts to focus on more intricate and mission-critical aspects. Leveraging AI algorithms, copious amounts of data from various sensors can be swiftly analyzed, patterns discerned, and early alerts generated, mitigating the need for manual intervention in monitoring and maintenance tasks. This breakthrough significantly enhances the efficiency of infrastructure monitoring processes and expedites the overall maintenance and management of vital assets. An exemplar advantage of AI-enabled infrastructure monitoring is its capacity to automate anomaly detection. AI algorithms scrutinize historical data, recognize patterns, and promptly identify anomalies, thereby reducing the necessity for human intervention in identifying irregularities. Furthermore, these algorithms are designed to adapt and refine their anomaly detection criteria over time, ensuring that the monitoring process remains contemporary and effective.

In addition to anomaly detection, AI-enabled infrastructure monitoring improves overall asset performance management. AI algorithms can gauge real-time data, pinpoint irregularities, and prioritize critical issues, empowering professionals to concentrate their efforts on resolving high-priority concerns and bolstering asset performance and reliability. Moreover, these algorithms are equipped to discern deviations from anticipated behaviors, facilitating early detection of potential issues and diminishing the likelihood of unexpected disruptions. The incorporation of AI into infrastructure monitoring also enhances data analysis and reporting. AI algorithms dissect monitoring data, decipher trends, and provide valuable insights into the condition of assets. This aids stakeholders in making informed decisions regarding maintenance and investment strategies. Furthermore, AI algorithms generate comprehensive reports, spotlighting areas requiring immediate attention and furnishing recommendations for optimization.

However, it is imperative to underscore that AI-enabled infrastructure monitoring is not intended to supplant human expertise. Human professionals still play an indispensable role in the interpretation of data, strategic analysis, and decision-making. AI serves as

an indispensable tool that augments the capabilities of experts, allowing them to channel their expertise toward more intricate aspects of infrastructure management.

Augmented Asset Surveillance

AI-enabled infrastructure monitoring harnesses the capabilities of AI algorithms to scrutinize voluminous data and pinpoint potential risks and vulnerabilities in critical infrastructure assets. By leveraging AI algorithms, organizations can expand their asset surveillance scope, ensuring comprehensive monitoring of all essential functionalities and potential risk scenarios. This inclusive approach reduces the likelihood of asset failures, augmenting the overall reliability and longevity of the infrastructure. AI algorithms are adept at comprehending intricate infrastructure structures, identifying potential flaws, and even predicting areas prone to deterioration. This facilitates proactive maintenance measures, effectively addressing issues before they escalate and impact operations. Additionally, AI-enabled infrastructure monitoring can simulate real-world scenarios and user interactions, enabling organizations to validate asset performance and durability under diverse conditions. By preemptively identifying and resolving potential issues in the development phase, organizations can save resources and mitigate challenges that may become more onerous and costly to rectify in the future. AI algorithms are also programmed to evolve their monitoring strategies through continuous learning from monitoring results, thereby optimizing infrastructure surveillance efforts.

Intelligent Anomaly Detection

AI-enabled infrastructure monitoring capitalizes on machine learning algorithms to identify irregularities in asset behavior based on historical data, user interactions, and usage patterns. By scrutinizing past monitoring data, these algorithms can identify areas necessitating additional surveillance, allowing experts to focus their attention on high-risk zones. This intelligent anomaly detection augments the overall monitoring process and aids in early defect detection during the infrastructure development phase.

The incorporation of AI algorithms in infrastructure monitoring engenders a multitude of advantages throughout the asset lifecycle. Firstly, it mitigates the manual effort required for anomaly detection. Traditionally, experts had to manually monitor and identify irregularities, a time-consuming and potentially error-prone process. With AI-enabled infrastructure monitoring, machine learning algorithms autonomously assess historical data and promptly alert operators to anomalies. This not only saves time but also guarantees comprehensive coverage and scrutiny of critical functionalities. Secondly, AI-

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enabled anomaly detection amplifies asset surveillance. Through analysis of past monitoring data, machine learning algorithms discern infrastructure areas that have not been vigilantly examined or bear a higher likelihood of harboring defects. Operators can then allocate resources judiciously to these high-risk zones, guaranteeing the early identification and resolution of potential problems. This targeted approach enhances overall infrastructure quality and diminishes the probability of deploying faulty assets.

Furthermore, AI algorithms are perpetually learning and adapting based on monitoring outcomes. With fresh monitoring data at their disposal, these algorithms recalibrate the anomaly detection parameters, ameliorating accuracy and effectiveness over time, and resulting in more efficient and effective anomaly detection.

Predictive Analytics for Preventive Maintenance

AI algorithms possess the capacity to analyze historical data to pinpoint patterns indicative of potential infrastructure issues. By harnessing predictive analytics, organizations can proactively detect potential defects and implement preventive measures, reducing the incidence of failures and ameliorating infrastructure reliability. This proactive approach is pivotal in minimizing the number of infrastructure issues and enhancing overall infrastructure quality. The aptitude of AI algorithms to scrutinize historical data is pivotal in recognizing patterns correlated with infrastructure defects. By delving into past monitoring results, AI algorithms can unearth correlations and trends that foreshadow defects. This in-depth analysis affords organizations valuable insights into the root causes of infrastructure issues and the factors contributing to their occurrence. By leveraging predictive analytics, organizations progress from merely identifying defects to implementing proactive measures to prevent their manifestation. AI algorithms employ patterns derived from historical data to forecast the likelihood of future defects, empowering organizations to preempt potential issues and institute preventive measures before they materialize as actual defects. By addressing underlying causes and mitigating risks proactively, organizations can significantly curtail the incidence of defects during the infrastructure development process.

The implementation of preventive measures based on predictive analytics bolsters overall infrastructure quality. By identifying and rectifying potential defects at an early stage, organizations evade costly rework, delays, and client dissatisfaction. Moreover, this proactive approach enables organizations to optimize resource allocation by directing efforts towards defect prevention, rather than reactive defect resolution. In addition to diminishing the number of defects, the deployment of predictive analytics augments the efficiency of the infrastructure development process. By proactively

identifying potential defects, organizations streamline monitoring efforts, prioritize critical areas, and allocate resources more efficiently. This translates to expedited development cycles, improved time-to-market, and heightened customer satisfaction.

Test Automation and Continuous Monitoring

AI-enabled infrastructure monitoring plays an instrumental role in automating various facets of the monitoring process, encompassing data analysis, anomaly detection, and performance evaluation. This automation empowers organizations to embrace continuous monitoring practices, where infrastructure assets are vigilantly observed throughout their lifecycle. Continuous monitoring engenders several benefits, including prompt issue identification, early defect detection, and accelerated asset deployment.

One of the salient advantages of AI-enabled infrastructure monitoring is the automation of anomaly detection. AI algorithms evaluate historical data, user interactions, and usage patterns to autonomously detect anomalies, circumventing the necessity for manual intervention. This automation ensures that assets are perpetually under scrutiny and irregularities are promptly identified. Moreover, AI algorithms are equipped to continuously learn from monitoring results and fine-tune their anomaly detection protocols over time, guaranteeing that the monitoring process remains contemporary and effective. Alongside anomaly detection, AI-enabled infrastructure monitoring streamlines asset performance evaluation. Through real-time data analysis, AI algorithms discern irregularities, facilitating the prompt identification of critical issues. This enables experts to concentrate their efforts on resolving high-priority concerns, thereby enhancing asset reliability and performance. Additionally, AI algorithms are adept at identifying deviations from expected behavior, allowing for early detection of potential defects and reducing the risk of deploying faulty assets. Infrastructure monitoring fortified by AI also aids in data analysis and reporting. AI algorithms scrutiny.

Key Market Challenges

Lack of Awareness and Understanding

The global infrastructure monitoring market faces a significant challenge in terms of limited awareness and understanding among organizations regarding the importance and benefits of adopting infrastructure monitoring solutions. Many businesses, particularly smaller enterprises, may not fully comprehend the potential risks and vulnerabilities associated with inadequate infrastructure monitoring practices. This lack of awareness can result in hesitation to invest in advanced monitoring solutions, leaving

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organizations exposed to infrastructure failures, downtime, and potential financial losses. Addressing this challenge requires comprehensive educational initiatives to highlight the critical role that infrastructure monitoring plays in ensuring the reliability, performance, and security of complex infrastructure systems. Organizations need to recognize that insufficient monitoring can lead to costly disruptions, compromised data integrity, and reputational damage. Real-world examples and case studies showcasing the tangible benefits of infrastructure monitoring can help foster a deeper understanding of its significance.

Complexity and Integration Issues

Implementing and managing infrastructure monitoring solutions can pose complex challenges for organizations, particularly those with limited IT resources or expertise. Configuring monitoring systems effectively and integrating them with existing infrastructure components and tools can be technically demanding. Compatibility issues may arise during integration, leading to delays and suboptimal performance. To address these challenges, it is crucial to simplify the deployment and management of infrastructure monitoring solutions. User-friendly interfaces and intuitive configuration options should be provided to streamline setup and customization. Additionally, organizations should have access to comprehensive support and guidance, including documentation, tutorials, and technical experts who can assist with integration and troubleshoot any issues. Simplifying these aspects of infrastructure monitoring implementation can lead to more efficient processes and improved infrastructure performance.

Data Overload and Actionable Insights

Infrastructure monitoring generates vast amounts of data, which can overwhelm organizations and make it challenging to extract actionable insights. The sheer volume and variety of data can hinder decision-making processes and delay the identification of critical issues. To overcome this challenge, organizations need advanced analytics capabilities that can process and analyze data in real-time, providing meaningful insights and actionable recommendations. Machine learning and AI technologies can play a crucial role in automating data analysis, anomaly detection, and predictive maintenance, enabling organizations to proactively address potential infrastructure issues. By leveraging these technologies, organizations can transform raw data into valuable insights, facilitating informed decision-making and efficient infrastructure management.

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Ensuring Scalability and Flexibility

As organizations expand their infrastructure and adopt new technologies, scalability and flexibility become crucial challenges in infrastructure monitoring. Monitoring solutions need to accommodate the growing complexity and diversity of infrastructure components, including on-premises, cloud-based, and hybrid environments. Additionally, organizations require the flexibility to customize monitoring parameters and adapt to evolving infrastructure requirements. To address these challenges, monitoring solutions should offer scalability options that can handle increasing data volumes and support the monitoring of diverse infrastructure components. Furthermore, flexible configuration options and integration capabilities should be provided to ensure seamless monitoring across different environments. By addressing scalability and flexibility challenges, organizations can effectively monitor their expanding infrastructure and adapt to changing business needs.

Cybersecurity and Threat Detection

The global infrastructure monitoring market faces the ongoing challenge of cybersecurity threats and the need for robust threat detection capabilities. As infrastructure systems become more interconnected and reliant on digital technologies, they become attractive targets for cybercriminals. Organizations need to implement monitoring solutions that can detect and mitigate potential security breaches, unauthorized access attempts, and other malicious activities. Advanced threat detection algorithms, anomaly detection techniques, and real-time monitoring capabilities are essential to identify and respond to cybersecurity threats promptly. By prioritizing cybersecurity in infrastructure monitoring, organizations can safeguard their critical assets, protect sensitive data, and maintain the trust of their stakeholders.

Key Market Trends

Elevation in Advanced Infrastructure Monitoring

The global infrastructure monitoring market is witnessing a surge in demand due to the escalating complexity of modern infrastructure systems and the need for real-time oversight. Organizations are increasingly turning to advanced infrastructure monitoring solutions to manage the intricate web of assets, from bridges and pipelines to data centers and IoT networks. This shift is prompted by a growing recognition of the importance of proactive infrastructure maintenance and risk mitigation. To address this demand, infrastructure monitoring providers are focusing on developing sophisticated,

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AI-powered solutions that can efficiently collect and analyze data from various sensors and devices. These advanced solutions enable predictive maintenance, early fault detection, and informed decision-making, ultimately enhancing the resilience and longevity of critical infrastructure assets. By harnessing AI and machine learning technologies, these solutions can identify patterns and anomalies, paving the way for swift responses to potential issues and ensuring the uninterrupted functionality of vital infrastructure systems.

Transition to Cloud-based Infrastructure Monitoring

The global infrastructure monitoring landscape is undergoing a substantial transition towards cloud-based solutions, in alignment with the pervasive adoption of cloud computing and the need for scalable and flexible monitoring capabilities. Organizations are seeking infrastructure monitoring solutions that seamlessly integrate with their cloud environments, allowing for efficient and centralized oversight of distributed assets. Cloud-based infrastructure monitoring solutions offer scalability, enabling organizations to effortlessly allocate resources in response to evolving monitoring needs. This adaptability ensures the effective monitoring of infrastructure assets, even during periods of heightened demand or expansion. Additionally, the flexibility of cloud-based solutions enables their deployment across diverse cloud platforms, empowering organizations to select the most suitable cloud infrastructure for their unique requirements. This adaptability facilitates seamless integration with existing cloud environments, streamlining infrastructure monitoring and offering enhanced agility.

Incorporation of Artificial Intelligence and Machine Learning

The integration of artificial intelligence (AI) and machine learning (ML) technologies into infrastructure monitoring solutions represents a prominent trend in the market. AI and ML algorithms can process vast volumes of monitoring data, discern patterns, and detect anomalies in real-time, empowering infrastructure monitoring solutions to efficiently adapt to evolving challenges. These advanced technologies significantly enhance the precision and effectiveness of infrastructure monitoring, resulting in a reduction of false alarms and missed issues. Infrastructure monitoring providers are making substantial investments in AI and ML capabilities to bolster fault detection, automate maintenance processes, and proactively safeguard against emerging risks. By leveraging AI and ML, organizations can elevate their infrastructure monitoring to a predictive and proactive level, averting potential disruptions and ensuring the integrity of critical assets.

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Segmental Insights

Component Insights

Based on components, the market is classified into hardware, software, and services. The hardware segment dominated with a market share of 58.8% in 2022. It is expected to grow at a CAGR of 9.8% throughout the forecast period. The hardware components are essential for collecting data, enabling communication, and facilitating the monitoring process. Adopting these hardware components in infrastructure monitoring allows for real-time data collection, analysis, and decision-making. By utilizing reliable and advanced hardware, operators can ensure the monitored infrastructure's optimal performance, safety, and longevity.

The services segment is expected to grow at a CAGR of 11.9% during the forecast period. The services component plays a vital role in infrastructure monitoring. The services encompass a range of activities that support monitoring systems' implementation, operation, and maintenance. Service providers offer expertise in installing and commissioning monitoring systems. This involves physically installing sensors, data acquisition units, communication devices, and other hardware components.

Service professionals ensure the system is appropriately set up, calibrated, and integrated for accurate data collection. The services component is crucial for maximizing the benefits of the systems. Service providers bring the expertise, technical knowledge, and experience to ensure the proper installation, integration, operation, and maintenance of the overall system. Through these services, the operators can leverage the full potential of infrastructure monitoring for enhanced safety, efficiency, and asset management.

Technology Insights

In terms of technology, the market is classified into wired technology & wireless technology. The wired technology segment held the largest revenue share of 56.8% in 2022. It is expected to grow at a CAGR of 8.1% throughout the forecast period. Wired systems play a significant role in the market as they utilize physical cables and wired connections to transmit data between various monitoring system components.

Wired systems provide a robust and stable means of data transmission and communication. It is specifically suited for applications that require reliable and

continuous monitoring, such as critical equipment and pipeline systems. The use of wired connections ensures secure and high-quality data transfer, supporting the integrity and efficiency of the monitoring process.

The wireless technology segment is expected to grow at the fastest CAGR of 13.9% during the forecast period. Wireless technology systems have emerged as a valuable solution for infrastructure monitoring systems. These systems utilize wireless communication methods to transmit data between various system components. The growth is attributed to the use of wireless sensors, remote monitoring, real-time data transmission, and cost-effectiveness compared to wired systems.

This technology is particularly suitable for applications with impractical or expensive wired connections. The adoption of wireless systems enhances the efficiency and effectiveness of monitoring practices, enabling timely decision-making, proactive maintenance, and improved overall asset management.

For instance, in May 2023, Scientists at Drexel University's College of Engineering created a wireless sensor system powered by solar energy. This innovative system is designed to monitor the deformation of bridges in real-time, providing ongoing surveillance of their structural integrity. In the event of a significant deterioration in bridge performance, the system can promptly notify relevant authorities, enabling timely intervention and maintenance measures.

Application Insights

Based on application, the market is classified into corrosion monitoring, crack detection, damage detection, vibration monitoring, thermal monitoring, multimodal sensing, strain monitoring, and others. The vibration monitoring segment gained the largest share of 22.9% in 2022 and is expected to witness a CAGR of 10.4% during the forecast period. Vibration monitoring allows for the assessment of structural dynamics, identification of potential issues related to stability, and evaluation of the impact of vibrations on overall infrastructure performance. It is extensively applied in various industries, including construction and other industrial facilities, to ensure the structural health and integrity of the infrastructure.

The damage detection segment is anticipated to witness a CAGR of 12.3% throughout the forecast period. Damage detection is a crucial application within the market. The growing emphasis on developing advanced sensor technologies & integration of machine learning & artificial intelligence is creating a significant opportunity for the

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damage detection application in the market. These sensors will offer higher sensitivity, improved accuracy, and increased durability, allowing for more precise and reliable detection of damages. For instance, integrating smart materials, such as carbon nanotubes or self-healing polymers, into sensors can enhance their capabilities and enable self-monitoring capabilities.

Regional Insights

North America dominated the overall infrastructure monitoring market in 2022, with a revenue share of 29.7%. It is expected to grow at a CAGR of 10.4% throughout the forecast period. Industries across various sectors in North America have recognized the importance of ensuring the efficient operation and integrity of the infrastructure. This has increased demand for solutions to enhance safety, optimize maintenance practices, and improve overall operational performance.

Companies across the region are investing in new product launches to stay ahead in the market. For instance, in October 2022, Doosan Infracore introduced a new and improved telematics monitoring service named Smart X-care. This subscription-based service provides enhanced capabilities for Doosan equipment. To support Smart X-Care, a dedicated machine center has been established at the Doosan Infracore headquarters. This proactive approach ensures that equipment issues are promptly addressed, helping to maximize the performance and efficiency of Doosan machinery.

Asia Pacific is expected to grow at the fastest CAGR of 12.3% during the forecast period. Significant investments are being made in the region to enhance the infrastructure devices' performance, security, and economic stability. As one of the leading emerging economies, China has taken substantial steps to implement real-time equipment monitoring systems, aiming to improve operational efficiency and boost productivity. The utility sector, in particular, has witnessed rapid adoption of technology due to its ability to provide effective solutions for critical asset management.

Key Market Players

Acellent Technologies, Inc.

Parker Hannifin

Siemens AG

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Emerson Electric

Digitex Systems

General Electric

Campbell Scientific, Inc.

National Instruments

Honeywell

Rockwell Automation

AVT Reliability Ltd.

Bridge Diagnostics, Inc. (BDI)

Yokogawa Electric Corporation

Report Scope:

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

Infrastructure Monitoring Market, By Component:

Solution

Services

Infrastructure Monitoring Market, By Vertical:

Oil & Gas

Manufacturing

Aerospace and Defense

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- Construction
- Automotive
- Power Generation
- Others

Infrastructure Monitoring Market, By Application:

- Corrosion Monitoring
- Crack Detection
- Damage Detection
- Vibration Monitoring
- Thermal Monitoring
- Multimodal Sensing
- Strain Monitoring
- Others

Infrastructure Monitoring Market, By Technology:

- Wired
- Wireless

Infrastructure Monitoring Market, By Region:

- North America
  - United States

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- Canada
- Mexico

Europe

- France
- United Kingdom
- Italy
- Germany
- Spain
- Belgium

Asia-Pacific

- China
- India
- Japan
- Australia
- South Korea
- Indonesia
- Vietnam

South America

- Brazil
- Argentina

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Colombia

Chile

Peru

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Israel

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Infrastructure Monitoring Market.

Available Customizations:

Global Infrastructure Monitoring market report with the given market data, Tech Sci 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).

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