Europe Portable Gas Detector Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 100 pages | Mordor Intelligence

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Report description:

Over the forecast period, the Europe portable gas detector market is expected to grow at a CAGR of approximately 3.26%.The growing need for the protection and security of personnel often exposed to hazardous gasses in industries is driving market growth. Furthermore, stringent government regulations concerning workplace safety, especially for industries such as chemical and petrochemical, oil and gas, etc., also support the studied market's growth.

Key Highlights
As accidental gas leaks pose a considerable threat to properties, the environment, and human life, portable gas detectors play a crucial role in ensuring workplace safety across various industries. These devices are used for combustible or toxic gas detection and oxygen deficiency monitoring, especially in confined spaces.
The increased demand for gas detectors combined with Internet of Things (IoT) and artificial intelligence (AI) solutions to enable anticipatory maintenance and the increased necessity for real-time data processing and delivery alerts during gas leaks are boosting the market's growth. Furthermore, the growing demand also encourages the vendors to launch new products in the European market.
For instance, in September 2022, Blackline Safety Corp., which has offices in the United Kingdom and France, launched a revolutionary connected wearable for single-gas detection. G6, a completely linked and intuitive system that uses the most recent Internet of Things (IoT) mobile connectivity, offers enhanced advantages, including longer battery life, a cheaper cost of ownership, and fewer false alarms.
Compared to other regions, the regulations concerning overall environmental emissions are relatively more stringent. The government regulates the leakage of such gases, which drives the demand for gas detectors. For instance, the EU-incorporated Directive 2010/75/EU is an instrumental regulation concerning the control of pollutant emissions into the atmosphere by industrial installations.

However, the primary issue in manufacturing gas detectors is that the devices often need help to identify dangerous gasses and, more critically, to distinguish between harmful and non-hazardous gasses, resulting in uncertainty in operations and periodic false signals. Furthermore, the requirement of various sensors to detect different types of gasses also impacts the overall cost of the device.
The COVID-19 outbreak has had a notable impact on the growth of the studied market, as the European region, especially countries like Italy, the United Kingdom, Germany, etc., reported a large number of infection cases. The widespread lockdown imposed as a result significantly disrupted the industrial sector, resulting in a slowdown in the demand for these devices. However, with the industrial sector starting to recover, the studied market is expected to witness an upward growth trend during the forecast period.

Europe Portable Gas Detector Market Trends

Oil and Gas Segment to Offer Market Growth Opportunities

The oil and gas industry will significantly impact the market as additional gas field discoveries translate into higher demand for such portable detectors. Multi-gas detectors are gaining popularity over traditional kinds due to their small form and better gas-detecting aspects. The increasing consumption of oil and gas also favors the growth of the studied market. For instance, according to BP, the annual oil consumption in Europe and the CIS increased from 791.7 million metric tons in 2020 to 831.4 million metric tons in 2021.
Increasing incidences of gas leaks across European countries will contribute to market demand as companies are increasingly focusing on using advanced equipment to make the process highly effective and efficient. For instance, in June 2021, the Clean Air Task Force (CATF) used infrared cameras to capture over 120 cases of methane emissions escaping from oil and gas activities in seven European countries, including Germany, Italy, Romania, Hungary, the Czech Republic, Austria, and Poland.
Furthermore, as a result of several government programs and regulations supporting the use of such devices, the oil and gas sector is likely to be among the region's most significant users of gas detectors. In June 2022, at the Major Economies Forum on Energy and Climate, a GMP Energy Pathway was announced to expedite methane pollution decreases in the conventional power sector.
Moreover, according to the International Energy Agency, by utilizing existing technologies, the oil and gas sector could reduce methane pollution by 75% by 2030. This, in turn, is expected to increase the awareness of adopting gas detection technologies in the European region over the coming years.

Furthermore, increasing government investments in the oil and gas sector, especially since the outbreak of the Russia-Ukraine dispute, are expected to increase the demand for portable gas detectors across the region over the forecast period. In May 2022, the European Commission launched a 210-billion-euro (USD 220 billion) strategy to wean Europe off Russian fossil resources in five years and accelerate its transition to renewable energy.

United Kingdom to Hold a Significant Market Share

The country's stringent regulatory restrictions for emissions throughout industries that boost workplace safety have increased the demand for diverse gas detector applications. The monitoring of the surroundings connected with workers' exposures to hazardous conditions such as gasses, noise, dust, and others is managed in the United Kingdom by COSHH (Control of Substances Hazardous to Health Regulations).
In the United Kingdom, concentrations of key pollutants in outdoor air are regulated by the Air Quality Standards (Wales)

Regulations 2010, the Air Quality Standards (Northern Ireland) Regulations 2010, and the Air Quality Standards (Scotland) Regulations 2010. The government has actively been making amendments to make these regulations more effective, supporting the market's growth. For instance, the UK government's latest climate change target calls for an emissions reduction of 78% by 2035 compared to 1990 levels.
Furthermore, the presence of significant players in the gas detector industry, including Crowcon Detection Instruments Ltd. and GFG Europe Trolex Ltd., headquartered in the UK, also supports the studied market's growth. Furthermore, the area is seeing the majority of technological breakthroughs, and the implementation of IIoT in various sectors is projected to benefit the market. Innovative product launches by market players operating in the regional market will contribute to market development. For instance, in September 2022, DraegerSafety UK, a market leader in safety and medical technology, introduced the X-am 2800, a novel portable gas detector, to its wide safety and gas detecting range. Since mobile gas detectors are carried on the body, durability is critical to their operational reliability.

The United Kingdom is also among the largest consumers of petroleum products in the European region and has several industries operating in the sector. Considering the higher degree of emissions associated with these industries, the demand for portable gas sensors is expected to remain high. According to BP, the United Kingdom's oil consumption in 2021 will be 57.3 million metric tons.

Europe Portable Gas Detector Market Competitor Analysis

The European portable gas detector market is moderately competitive, with the presence of several players offering multiple products. Some of the major players operating in the market include Honeywell International Inc., MSA, Thermo Fisher Scientific Inc., Industrial Scientific, and GfG Gas Detection, among others. These players are adopting strategies such as product launches, product innovation, mergers, and acquisitions, along with partnerships, to capture more market share.

In November 2022, ION Science, a UK-based company, introduced the Tiger XT series of portable VOC detectors, which provide consumers with improved efficiency and durability. The newest detector series maintains all of the market-leading benefits of its predecessors, the Tiger range, and includes three models: the Tiger XT compact VOC detector, the entry-level Tiger XTL portable VOC gas detector, and the Tiger XT Select benzene detector.

In November 2022, IGD announced the availability of the 903-X5. With dual gas detection capacities and a choice of 400 plug-replaceable sensors, it includes IGD's long-life PID and poison-resistance MK8 Pellistor. This detector satisfies all gas identification requirements and is offered by IGD with service, training, and installation.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

Table of Contents:

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