

Europe Air Quality Monitoring - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Air Quality Monitoring Market size is estimated at USD 10.60 billion in 2024, and is expected to reach USD 11.39 billion by 2029, growing at a CAGR of 1.45% during the forecast period (2024-2029).

Key Highlights

- Over the long term, strict government-mandated emission norms in industrial and commercial operations are expected to drive the market during the forecast period.
- On the flip side, the growing impetus to the renewable energy industry leading to a closure of coal and natural gas-fired power plants is expected to result in a decrease in air pollution levels across the region, restraining the demand for air quality monitoring devices during the forecast period.
- Nevertheless, technological advancements in monitoring equipment to monitor levels of trace contaminants are expected to be a significant growth opportunity for the market during the forecast period.

Europe Air Quality Monitoring Market Trends

Continuous Type to dominate the market

- Automatic or continuous ambient air quality monitoring stations (CAAQMS) can monitor pollutants using different analyzers, reducing the chances of manual error, generating data at time intervals of minutes, and transmitting the data while minimizing manual intervention. These systems comprise sampling, conditioning, and analytical components and software designed to

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provide direct, real-time, continuous pollution measurements by analyzing representative sample(s) of air.

- Due to their real-time measurement capabilities, these systems are typically installed at places with a high level of air pollution for dynamic air quality monitoring. Therefore, these systems have been traditionally used for air quality monitoring around industrial facilities to measure the dynamic levels of industrial air pollutants such as SO_x, NO_x, CO_x, and particulates (mostly PM_{2.5} and PM₁₀). Most continuous air monitoring programs require simultaneous monitoring of meteorological conditions because these parameters influence local and regional air quality.
- In developed economies like those in Europe, air quality has become an increasingly significant parameter for safeguarding social health. Hence, these countries have enacted strict Health, Safety, Security, and Environment (HSSE) regulations in building and industrial construction, which, in turn, has led to the growth in demand for indoor air quality monitoring systems to ensure compliance.
- The rise in the construction of smart buildings across Europe has led to a surge in demand for continuous indoor air quality monitoring systems coupled with Internet of Things (IoT) systems. These systems can dynamically alert the owners about prospective air quality issues, with indoor continuous air quality monitoring systems installed in commercial spaces, offices, and schools.
- Air pollution is a growing health concern in Europe. According to the European Environmental Agency (EEA), more than 90% of the urban population in the European Union (EU) were exposed to fine particulate matter levels above the guideline level set by the World Health Organization (WHO). Further, exposure to concentrations of fine particulate matter above the 2021 WHO guideline resulted in more than 230,000 premature deaths in the EU-27 region. The region's primary sources of air pollution come from burning fossil fuels in energy, transport, households, and industrial and agricultural activities.
- In 2022, the energy sector was the most polluting in Europe, emitting roughly 3769.8 million tonnes of carbon dioxide equivalents of carbon dioxide.
- Unlike other markets that were negatively impacted due to the global recession triggered by the COVID-19 pandemic, the air quality equipment and monitoring markets have grown considerably. As the SARS-2 coronavirus is an airborne virus, concerns about infections caused by indoor viral pollution in constrained spaces have led to the developing and deploying advanced anti-viral air monitoring and treatment systems to reduce the chances of contagion. This has led to explosive growth in demand for specialized continuous indoor air quality monitoring systems.

United Kingdom to have a Significant share in the market

- The United Kingdom is widely recognized for having one of the most comprehensive air quality monitoring programs in the European Union. In April 2023, A new round of Air Quality Grants for local administrations was opened to aid communities and lessen the impact of polluted air on people's health in the United Kingdom. Local administrations across England can now apply for a share of USD 7.61 million of the government budget to provide projects to enhance air quality.
- The annual Air Quality Grant permits councils to develop and execute measures to benefit businesses, schools, and communities and lessen the impact of air pollution on people's health. Since 2010, more than USD 67.19 million has been awarded across more than five hundred projects through the scheme.
- The budget will be prioritized towards projects that tackle particulate matter, enhance public understanding of the effects of air pollution, and help local authorities bring down levels of nitrogen oxide (NO₂) and other pollutants below legal limits. Thus, such initiatives by the government are likely to increase demand for air quality monitoring systems during the forecast period.
- Around 300 environment agency-managed monitoring sites across the United Kingdom monitor air quality, and these are organized into networks that gather a particular kind of information using a particular method. The pollutants measured and the method used by each network depends upon the reason for setting up the network and what the data are to be used for.
- In 2022, the energy sector was one of the most polluting in the United Kingdom, emitting roughly 344.6 million tonnes of carbon dioxide equivalents of carbon dioxide. The network that monitors concentrations of the most well-known pollutants is called the Automatic Urban and Rural Network (AURN), which reports data hourly in near real-time.

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- The United Kingdom has strict guidelines and a widespread monitoring network, and these factors are expected to drive the market's growth during the forecast period.

Europe Air Quality Monitoring Industry Overview

The Europe air quality monitoring market is semi-consolidated. Some of the key players in the market (in no particular order) include Honeywell International Inc., Horiba Ltd., 3M Company, Thermo Fisher Scientific Inc., and Siemens AG, among others.

In September 2022, Honeywell launched a solution that integrates early warning smoke detection with progressive indoor air quality (IAQ) monitoring, advancing its efforts to develop secure and healthful buildings. Created on the flagship Vesda-E line of aspirating smoke detectors, the Vesda Air solution has an individual five-in-one IAQ sensor within a single box. It can help enhance building safety by determining life safety, asset protection, or IAQ issues before they escalate into problems.

Additional Benefits:

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

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