

Europe Pipeline Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Europe Pipeline Security Market size is estimated at USD 3.47 billion in 2024, and is expected to reach USD 5.23 billion by 2029, growing at a CAGR of 8.56% during the forecast period (2024-2029).

Key Highlights

- Pipeline systems have evolved to become the primary solution for commercial activities. The market for pipeline security has been boosted by the demand for sustainable use of resources and the rising frequency of breaches and theft of small quantities of the product being transported.
- The pipeline system has been used since the 18th century for commercial activities. The pipelines are considered the safest, most reliable, and most efficient means of transporting large quantities of natural gas, crude oil, chemicals, and water across nations. Pipeline installations are critical infrastructure of high importance and value, and a threat to it can significantly affect meeting people's and organizations' needs and harm the environment.
- The pipeline installed for transporting commodities is estimated to span 3.5 million kilometers across 120 countries. Natural gas and crude oil pipelines are expected to be the most vulnerable to attacks. Hence, the oil and gas corporation's increased spending to install robust security infrastructure to ensure the security of the pipelines has been the primary reason for the market's growth.
- Demand for natural gas is anticipated to increase faster than the current demand for coal or oil. The increasing natural gas usage is increasing the demand for pipeline security.
- Additionally, the robust state-sponsored cyber-espionage campaigns are the most affected by the oil and gas sector, which can also affect the physical infrastructure. These vulnerabilities have pushed the industry players to divert significant funds for security.
- However, the high deployment and maintenance cost is incorporated with the pipeline security systems as the facility is diverse

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

and scattered. This factor is restricting companies from pipeline security system adoption.

Europe Pipeline Security Market Trends

SCADA Segment to Hold a Significant Share

- Supervisory Control and Data Acquisition (SCADA) software have experienced rapid growth over the past decade. SCADA system helps the end-user industry employees to analyze the data and make crucial decisions from a remote location.
- It further assists in mitigating the issues with a quick response as it processes, distributes, and displays the data on Human Machine Interface (HMI). Pipeline SCADA systems immediately detect hazards and leaks and effectively alarm security forces or maintenance crews.
- It offers a unique solution for the detection of on and underground activities. The applications are specifically used for the detection of digging and leakage.
- The UK alone has about 20,000 kilometers of pipelines for transporting petroleum products. SCADA systems are employed to monitor and control this massive oil pipeline network. The oil pipeline SCADA has several hundred RTUs (remote terminal units) connected to field instruments that measure pressure, temperature, and rate of flow of the oil flowing through the pipes and change the statuses of valves and pumps along the pipeline.
- According to EIA, the energy demand is expected to reach 681 quadrillions of BTU by 2040. The increasing demand for natural gas production and supply globally to reduce carbon emission demands pipeline security systems.

Increasing investments in oil and gas is driving the market

- The increasing investments in oil and gas significantly contribute to the region's pipeline security market growth. The European Union (EU) is highly dependent on external natural gas supplies and has experienced severe gas cuts in the past, mainly driven by the high-pressure natural gas system's technical complexity and political instability in some of the supplier countries.
- Declining indigenous natural gas production and growing demand for gas in the EU has encouraged investments in cross-border transmission capacity to increase resource-sharing between the member states, particularly in the aftermath of the Russia-Ukraine gas crisis.
- Amidst the growing need to cut operating costs, companies operating through the pipeline in the region seek help from AI to automate functions, predict equipment problems, and increase the output of oil and gas.
- At present, European countries are among the primary consumers of Azerbaijani oil. Italy is Azerbaijan's leading trading partner selling this oil on world markets. In the autumn of this year, Europe will also start consuming Azerbaijani gas.
- For this purpose, a 3,500-kilometer-long Southern Gas Corridor pipeline is being built and is nearing completion. Its last ring, the Trans-Adriatic Pipeline to the Adriatic Sea's Italian shores, is 97 percent completed. TAP is the Southern Gas Corridor's European section, enhancing Europe's energy security and contributing to decarbonization and gas supply diversification.

Europe Pipeline Security Industry Overview

Europe's Pipeline Security market trend is moderately towards consolidation as a significant market share lies with the major market players. Innovation in the market requires the developers to have a better understanding of the industrial process to deliver a suitable solution and also drives close collaboration among the stakeholders during development and customization to suit the end-users' needs. Some prominent vendors in the market include Honeywell International, General Electric Company, ABB

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Ltd., etc.

In December 2022, ABB launched the Sensi+ analyzer, offering a reliable solution that simplifies and decreases the cost of pipeline operation and maintenance. The solution was expected to enable safer, easier, and more efficient pipeline monitoring and operations through a single device that can analyze up to three contaminants (H2S, H2O, CO2) in any natural gas stream accurately and in real time.

In October 2022 - Blackline Safety Corp launched the all-new G6 personal gas detector, a connected wearable that delivers quick incident reaction time and a more effective approach to managing safety and compliance, to transform single-gas detection.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

4.1 Market Overview

4.2 Market Drivers

4.2.1 Increased Spending of Oil and Gas Companies

4.2.2 Growing Worldwide Demand for Natural Gas

4.2.3 Increasing Requirement of SCADA System

4.3 Market Restraints

4.3.1 Scattered Facilities

4.3.2 High Implementation and Maintenance Costs

4.4 Industry Value Chain Analysis

4.5 Industry Attractiveness - Porter's Five Forces Analysis

4.5.1 Bargaining Power of Buyers

4.5.2 Bargaining Power of Suppliers

4.5.3 Threat of New Entrants

4.5.4 Threat of Substitute Products

4.5.5 Intensity of Competitive Rivalry

4.6 Assessment of the impact of COVID-19 on the industry

5 MARKET SEGMENTATION

5.1 By Product

5.1.1 Natural Gas

5.1.2 Crude Oil

5.1.3 Hazardous liquid pipelines/ Chemicals

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.4 Other Products
- 5.2 By Technology and Solution
 - 5.2.1 SCADA System
 - 5.2.2 Perimeter Security/Intruder Detection System
 - 5.2.3 Industrial Control Systems Security
 - 5.2.4 Video Surveillance and GIS Mapping
 - 5.2.5 Pipeline Monitoring
 - 5.2.6 Other Technology and Solutions
- 5.3 By Country
 - 5.3.1 Germany
 - 5.3.2 United Kingdom
 - 5.3.3 France
 - 5.3.4 Russia
 - 5.3.5 Spain
 - 5.3.6 Rest of the Europe

6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles*
 - 6.1.1 Honeywell International Inc.
 - 6.1.2 General Electric Company
 - 6.1.3 ABB Ltd.
 - 6.1.4 Rockwell Automation, Inc.
 - 6.1.5 Siemens AG
 - 6.1.6 Schneider Electric S.E.
 - 6.1.7 Optasense Ltd.
 - 6.1.8 Senstar Corporation
 - 6.1.9 Huawei Technologies USA, Inc.
 - 6.1.10 ESRI Inc.
 - 6.1.11 Thales SA

7 INVESTMENT ANALYSIS

8 FUTURE OF THE MARKET

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Europe Pipeline Security - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 110 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-03
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com