

Pipeline Security Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Pipeline Security Systems Market size is estimated at USD 10.54 billion in 2025, and is expected to reach USD 15.00 billion by 2030, at a CAGR of 7.32% during the forecast period (2025-2030).

The increasing pipeline infrastructure, demand for leak detection, and network monitoring solutions to avoid leakage accidents and incidents drive the market growth. The rapid adoption of AI and machine learning improves the performance of pipeline security systems and is expected to drive the market further.

Key Highlights

- Pipeline security systems are crucial in natural Gas, crude Oil, and chemicals pipelines. The system detects leakages and different kinds of hazards and immediately alerts the security or maintenance teams. The pipeline security systems involve the use of various sensors, cameras, and other monitoring devices along the pipeline route. Another challenge is the increasing concern for environmental safety and protection from fluid product leakages.
- Demand for natural gas is anticipated to increase faster than the current demand for coal or oil in the future. According to IEA, global gas demand is expected to grow by 140 billion cubic meters in 2021-2025. Further, the report stated that the Asia-Pacific region will likely contribute half of the projected growth in global gas demand by 2025. This has been predicted with the consideration to adhere to the carbon reduction targets set globally to move towards an eco-friendly industrial sector. Similarly, the oil demand increased exponentially in 2023. According to IEA, global oil demand increased by 2 million b/d from 2022, which is increased to averaging 102.02 million b/d in 2023. The growing natural gas and oil demand is expected to create growth opportunities.
- For instance, in March 2024, SONATRACH, Algeria's state-owned oil company, announced a smart oil and gas pipeline inspection solution developed in collaboration with Huawei at MWC Barcelona 2024. This innovative solution integrates advanced fiber optic

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sensing technology to enhance pipeline security, intelligence, and operational efficiency. Huawei's contribution to this initiative includes the development of a sophisticated pipeline fiber sensing solution leveraging distributed fiber optic sensing technology.

- However, the high deployment and maintenance cost is incorporated with the pipeline security systems as the pipeline facility is diverse and scattered. This factor is restricting companies from pipeline security system adoption.
- The COVID-19 pandemic negatively impacted the oil and gas industry, as the demand for oil and gas declined due to reduced business travel and increased teleworking. Due to the pandemic, there has been a drop in oil and gas refinery throughput, disruption of the supply chain, a halt in manufacturing, and the postponement of pipeline infrastructure projects worldwide, which has resulted in a decrease in demand for pipeline security systems for a short period.

Pipeline Security Systems Market Trends

Crude Oil Product is Expected to Hold Significant Market Share

- The growing demand for crude oil and its derivatives has been a significant driver in the expansion of the pipeline security systems market. As the global economy continues to depend heavily on oil for energy and industrial processes, the infrastructure to transport this vital resource has become increasingly critical.
- In addition to this, in July 2024, ONEOK, Inc. announced plans to expand its pipeline capacity connecting Mid-Continent and Gulf Coast refined products supply with the greater Denver area to meet growing demand and increase connectivity with Denver International Airport (DIA). The project includes construction of a new 230-mile, 16-inch diameter pipeline from Scott City, Kansas, to DIA and the addition or upgrading of certain pump stations along the existing refined products pipeline system. Total system capacity will increase by 35,000 barrels per day (bpd) and will have additional expansion capabilities.
- Advancements in technology have also played a crucial role in this market's growth. Modern pipeline security systems integrate sophisticated technologies such as sensors, surveillance cameras, and drones, combined with advanced software for real-time monitoring and data analysis.
- These systems are designed to detect and respond to threats swiftly, minimizing environmental damage and economic losses. The rising incidents of cyber-attacks on critical infrastructure have further spurred the adoption of comprehensive security solutions that protect both the physical and digital aspects of pipeline operations.
- Overall, the augmentation of the pipeline security systems market is closely linked to the burgeoning demand for crude oil. This has driven significant investments in advanced security technologies, propelled by the need to protect vital infrastructure from diverse threats, comply with regulatory requirements, and address environmental concerns. As the global energy landscape continues to evolve, the pipeline security systems market is poised for continued growth, ensuring the safe and efficient transport of crude oil across the world.

North America is Expected to Hold Significant Market Share

- North America is expected to hold the significant share in the pipeline security system due to the large network of oil and gas pipelines and rapid technological developments. Increasing investments in oil and gas significantly contribute to the growth of the market in the region. The region has been at the forefront of developing and adopting advanced technologies in pipeline security. This includes state-of-the-art surveillance systems, real-time monitoring, leak detection technologies, and cybersecurity solutions.
- The oil and gas industry's activities, including exploration, production, transportation, and refining, influence the demand for pipeline security systems. Fluctuations in oil prices, geopolitical factors, and market trends can impact investment in security technologies.
- The pipeline security systems market in North America has been experiencing significant growth due to increasing concerns

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about the safety and integrity of critical infrastructure. This growth is driven by several factors including the rising incidence of cyberattacks, physical threats to pipeline infrastructure, and stringent regulatory frameworks mandating enhanced security measures. Governments and private sector companies are investing heavily in advanced security solutions to safeguard oil, gas, and water pipelines from both physical and cyber threats.

- In March 2024, Canadian pipeline operator Enbridge announced the completion of its acquisition of the East Ohio Gas Company (EOG) from Dominion Energy. Together, these businesses provide natural gas to around three million households and businesses and operate around 125,528km of pipelines for natural gas distribution, transmission, gathering and storages.
- For instance, in July 2023, the Transportation Security Administration (TSA) updated its Security Directive regarding natural gas and oil pipeline cybersecurity. The reissued security directive for critical pipeline companies was developed with input from organizations stakeholders and federal partners, including the Cybersecurity and Infrastructure Security Agency (CISA) and department of Transportation.

Pipeline Security Systems Industry Overview

The Pipeline Security Systems Market is highly fragmented, with the presence of major players like Honeywell International Inc., General Electric Company, ABB Ltd., Rockwell Automation, Inc., and Siemens AG. Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

Additional Benefits:

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

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