

ANMD-MRS30-300 · Smart Manufacturing Technologies

Connected Worker Safety Platforms

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Connected worker safety platforms protect the industrial workforce in real time — spanning safety wearables, proximity / hazard detection, lone-worker monitoring, safety-analytics platforms and connected PPE that sense risk, alert workers and surface leading indicators before incidents occur. They put worker wellbeing at the centre of the smart factory. This report is a comprehensive, decision-grade study of the connected-worker-safety market across platform type, sensing capability, component, application, end user and deployment model, spanning history 2020–2024, a 2025 base year, a 2025–2032 forecast and long-term outlooks to 2035, 2040 and 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

The sustainability case is squarely social. Connected worker safety advances worker wellbeing, injury prevention and decent-work conditions — the 'S' of ESG made operational.

Mapped Sustainable Development Goals:

SDG 8 Decent Work	SDG 3 Good Health	SDG 9 Industry & Innovation
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Measurable sustainability outcomes assessed:

- Recordable-incident and lost-time-injury reduction
- Real-time hazard exposure monitoring and worker wellbeing
- Compliance evidence and safety-culture maturity uplift
- Wearable lifecycle, data privacy and surveillance ethics as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	9 Report Parts	7 Regions Covered	40+ Country Markets
2025–32 Forecast Horizon	4 Forward Scenarios	25+ Companies Profiled	3 SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Across the seven reporting regions, the report separates innovation leaders from regulation-anchored and fast-scaling markets, profiling named country sub-markets, safety programmes and supply pipelines in each. North America leads innovation; Europe anchors industrial safety; Asia Pacific and others scale; while Latin America, Africa and the Middle East are assessed on their own merits rather than aggregated away.

MARKET OVERVIEW

From reactive compliance to real-time protection — where connected wearables turn worker safety into a continuously managed system.

Connected worker safety is a fast-growing, ESG-aligned segment. Demand is driven by safety regulation, insurance and liability pressure, labour scarcity and the maturity of wearable sensing and analytics. The market is read three ways — value, devices / seats and monitored workers — and forecast under conservative, base, accelerated and disruption scenarios, with every projection resolved to the 2025 base year and each region reported separately rather than folded into Rest of World.

- North America leads innovation, anchored by the United States and Canada, where Blackline Safety, Guardhat, Triax, MakuSafe, Intenseye and Voxel drive wearable and vision-based safety.
- Europe anchors industrial safety, with Germany, Ireland and the UK advancing Drägerwerk, Protex AI and Wearable Technologies under strong regulation.
- Asia Pacific and others scale, as Australia, Brazil and India contribute SmartCap, Tractian, SOTER Analytics and TCS across mining, construction and manufacturing.
- Platform type and sensing segment the value, across wearables, proximity/hazard detection and connected PPE, and physiological, environmental and vision-based sensing.

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Innovation leader	United States, Canada — Blackline Safety Corp., Guardhat, Inc., Triax, Intenseye, Inc., Voxel
Europe	Safety-regulation leader	Germany, Ireland, UK — Drägerwerk AG & Co. KGaA, Protex AI, MSA, Wearable Technologies
Asia Pacific	Scaling	Australia, India — SmartCap, SOTER Analytics, TCS, mining & manufacturing
Latin America	Emerging	Brazil, Mexico — Tractian, industrial & mining safety
Africa	Frontier	South Africa, Egypt — mining & heavy-industry safety
Middle East	Frontier	Saudi Arabia, UAE — oil & gas, construction safety

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> • Worker-safety regulation & enforcement • Insurance, liability & incident-cost pressure • Labour scarcity & workforce wellbeing • Wearable-sensing & analytics maturity • ESG & social-license expectations 	<ul style="list-style-type: none"> • Worker privacy & data-consent concerns • Comfort, battery & wearability limits • Integration with EHS systems • Change-management & adoption barriers • ROI-proof for prevention spend

SEGMENTATION SNAPSHOT

By Platform Type	Safety wearables · proximity / hazard detection · lone-worker monitoring · safety analytics · connected PPE
By Sensing Capability	Physiological · environmental / proximity · vision-based
By Component	Wearable hardware · analytics software · connectivity · services
By Application	Manufacturing · construction · oil & gas / mining
By End User	Manufacturers · EHS teams · workers · system integrators
By Deployment	Device-only · site platform · enterprise EHS-integrated

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Connected Worker Safety Platforms
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape

Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
- › Chapter 30. ESG and Sustainability Framework Alignment
- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans safety-equipment primes, connected-worker specialists and vision-AI safety vendors.

Representative players profiled in the full report:

Honeywell International Inc. · Blackline Safety Corp. · Guardhat, Inc. · Triax Technologies, Inc. · Drägerwerk AG & Co. KGaA · MSA Safety Incorporated · Intenseye, Inc. · and further profiled players across the value chain.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a structured investment recommendation.

KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global Connected Worker Safety Platforms market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do the category economics change returns versus incumbent approaches?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › **Triangulated sizing** — every market read multiple ways so value, volume and physical-unit views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, structured investment recommendation.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, manufacturers and OEMs, system integrators, plant operators, EHS and safety leaders, policymakers, lenders, and corporate strategy and ESG teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.