

Utility Billing Software Market Report by Deployment Mode (On-premises, Cloud-based), Type (Platform as a Service, Infrastructure as a Service, Software as a Service), End User (Water, Power Distribution, Oil and Gas, Telecommunication, and Others), and Region 2024-2032

<https://marketpublishers.com/r/U7E75E80A5CFEN.html>

Date: April 2024

Pages: 137

Price: US\$ 3,899.00 (Single User License)

ID: U7E75E80A5CFEN

Abstracts

The global utility billing software market size reached US\$ 5.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 10.6 Billion by 2032, exhibiting a growth rate (CAGR) of 7.5% during 2024-2032. Growing awareness and importance of energy conservation, evolving regulations and mandates in various regions, increasing customer expectations, rapid urbanization, significant advancements in technology, global expansion of utility services, and environmental sustainability, are some of the major factors propelling the market.

Utility billing software (UBS) is a comprehensive solution that helps streamline the process of managing and invoicing utility consumption for residential, commercial, and industrial customers. This software enables utility companies to track usage data, calculate accurate bills, integrate finances, manage accounts, mitigate the risks of fraudulent activities, resolve user inquiries, and efficiently communicate with their customers. It incorporates advanced features, such as real-time data analytics and customer engagement tools that help enhance operational efficiency, reduce billing errors, and provide customers with greater transparency and control over their utility expenses. It is available in various deployment models, including cloud-based, on-premises, and build-your-own solutions.

The growing awareness and importance of energy conservation have led to increased

adoption of utility billing software as it helps in monitoring and managing energy consumption, ultimately promoting energy efficiency. In addition to this, the evolving regulations and mandates in various regions are driving utility companies to maintain accurate billing records and provide transparency to customers, thereby boosting the demand for UBS. Moreover, rapid urbanization has increased the demand for utility services, which, in turn, is impelling the adoption of UBS among utility providers to allow them to efficiently manage and bill for these services in densely populated areas. Furthermore, significant advances in technology, such as the Internet of Things (IoT) and smart meters, have enhanced data collection capabilities and made UBS more valuable for data analysis and billing accuracy, thereby strengthening the market growth.

Utility Billing Software Market Trends/Drivers:

Rising demand for energy efficiency

The increasing global awareness of environmental sustainability and the rising need to reduce energy consumption are pivotal factors driving the utility billing software market. As societies become more conscious of their carbon footprint, utility companies are under pressure to enhance energy efficiency. UBS plays a crucial role by providing real-time insights into energy usage patterns, enabling customers to make informed decisions on reducing consumption. This demand for energy efficiency solutions is further fueled by government regulations and incentives aimed at promoting responsible energy use. Besides this, UBS empowers consumers to monitor and manage their energy consumption and assists utility providers in optimizing resource allocation and reducing waste, making it an indispensable tool in today's eco-conscious world.

Regulatory compliance

Evolving regulatory frameworks and increased scrutiny of utility providers have made regulatory compliance a paramount concern. UBS is essential for utility companies to meet these requirements by maintaining accurate billing records, ensuring transparency, and adhering to billing standards. In an environment of changing regulations, such as data privacy and consumer protection laws, UBS offers the adaptability and scalability necessary to stay compliant. Concurrent with this, the ability to generate comprehensive reports and audit trails enhances transparency, reduces the risk of non-compliance penalties, and fosters trust among customers and regulatory bodies alike. Therefore, the growing complexity of regulatory landscapes is a significant driver for the adoption of utility billing software.

Increasing customer expectations

With the expanding penetration of digitalization and connectivity, customers expect instant access to their utility data, personalized services, and transparent billing processes. UBS addresses these heightened customer expectations by offering self-service portals and mobile applications that empower consumers to monitor their usage, receive real-time alerts, and access billing information conveniently. This emphasis on customer-centric solutions is driving utility providers to invest in advanced billing software that not only enhances customer experience but also fosters brand loyalty. As competition in the utility sector intensifies, meeting and exceeding customer expectations has become a strategic imperative, making utility billing software a critical tool for retaining and attracting customers in an increasingly competitive market landscape.

Utility Billing Software Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on deployment mode, type and end user.

Breakup by Deployment Mode:

On-premises

Cloud-based

Cloud-based holds the largest share in the market

The report has provided a detailed breakup and analysis of the market based on the deployment mode. This includes on-premises, and cloud-based. According to the report, cloud-based represented the largest segment.

Cloud-based utility billing software offers unparalleled scalability, allowing utility companies to adapt to fluctuating demand seamlessly. Moreover, cloud-based solutions considerably reduce the burden of infrastructure management, cutting down on capital expenditures and operational overhead. This cost-efficiency is especially attractive to utility providers seeking to optimize their spending while maintaining robust software capabilities. Concurrently, cloud-based deployment ensures accessibility from anywhere with an internet connection, facilitating remote work and real-time data access for utility companies and their customers. Apart from this, it also provides robust security measures and data backup, addressing concerns about data protection and business

continuity, which makes it the dominant choice in the deployment mode segment of the utility billing software market.

Breakup by Type:

Platform as a Service

Infrastructure as a Service

Software as a Service

The report has provided a detailed breakup and analysis of the market based on the type. This includes platform as a service, infrastructure as a service, and software as a service.

Platform as a service (PaaS) UBS offers a ready-made development environment with pre-configured Infrastructure and tools that accelerate the software development process for utility billing solutions, reducing time-to-market. This presents remunerative opportunities for market expansion. In confluence with this, the surging popularity of infrastructure as a service (IaaS) for UBS providers as they offer a vast range of infrastructure services, including virtual machines, storage, and networking, that can be provisioned quickly is contributing to the market's growth. Furthermore, this agility enables utility companies to deploy and update their billing software rapidly, adapting to changing market conditions and customer needs with ease, thereby boosting product adoption. Additionally, the expanding deployment of software as a service (SaaS) in UBS platforms due to their inherently scalable nature, easily accommodating changes in user numbers, data volume, and service expansion, is aiding in market expansion.

Breakup by End User:

Water

Power Distribution

Oil and Gas

Telecommunication

Others

Power distribution holds the largest share in the market

A detailed breakup and analysis of the market based on the end user has also been provided in the report. This includes water, power distribution, oil and gas, telecommunication, and others. According to the report, power distribution accounted

for the largest market share.

Electricity is an essential utility service, and power distribution companies serve a vast customer base, including residential, commercial, and industrial consumers. This widespread consumer reach creates a substantial demand for utility billing software, as power distribution companies require robust and scalable solutions to manage billing processes efficiently. In addition to this, regulatory bodies often closely monitor the power distribution industry, imposing stringent requirements for billing accuracy, transparency, and compliance. Utility billing software provides the necessary tools to ensure compliance with these regulations, lessening the risk of penalties and legal challenges. Concurrent with this, the power distribution sector's size, complexity, technological advancements, and regulatory demands underscore the crucial role of utility billing software in efficiently managing power distribution operations and meeting customer expectations, positively impacting the market growth.

Breakup by Region:

- North America
 - United States
 - Canada
- Asia-Pacific
 - China
 - Japan
 - India
 - South Korea
 - Australia
 - Indonesia
 - Others
- Europe
 - Germany
 - France
 - United Kingdom
 - Italy
 - Spain
 - Russia
 - Others
- Latin America
 - Brazil
 - Mexico

Others

Middle East and Africa

North America exhibits a clear dominance, accounting for the largest utility billing software market share

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America's highly developed and mature utility sector comprising a vast network of electricity, water, gas, and other utility providers necessitates robust and sophisticated billing solutions, driving the demand for utility billing software. Moreover, the increasing emphasis on sustainability and energy efficiency in the region has led to a rising demand for advanced utility billing solutions that can help consumers and businesses track and manage their energy consumption. In line with this, stringent regulatory compliance and surging customer expectations for convenience and transparency play a substantial role in fueling the market growth. Furthermore, the growing adoption of smart meters and IoT technology in North America has created a rising need for billing software that can effectively handle the vast amount of data generated by these devices, enabling utilities to offer real-time billing and consumption information to customers, thereby creating a favorable outlook for market expansion.

Competitive Landscape:

The global utility billing software market is characterized by intense competition, shaped by numerous established software providers and emerging startups vying for market share, offering a wide range of solutions to cater to the diverse needs of utility companies worldwide. The leading market players are expanding their global presence by entering new markets and forming strategic partnerships. Moreover, these companies understand the diverse needs of utility providers, and they are focused on creating flexible and scalable solutions. Besides this, they are building strong partnerships with utility companies, demonstrating a commitment to data security, and offering user-friendly interfaces to gain a competitive edge in this market. The competitive landscape is further influenced by mergers and acquisitions, as companies seek to expand their offerings and geographic reach.

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Continental Utility Solutions Inc.,
ePsolutions Inc.
Exceleron Software
Harris Computer (Constellation Software Inc.)
Jayhawk Software Inc.
Jendev Corporation
Methodia Group
Oracle Corporation
Sigma Software Solutions Inc.
SkyBill SIA
Utilibill Pvt. Ltd.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Recent Developments:

In December 2022, Harris Computer announced the acquisition of Service-Link and added a mobile workforce management solution to its Utilities Group.

In October 2022, Exceleron Softwares Inc. announced an enhancement to the MyUsage solution in order to support Amazon web services and tier-1 private cloud options that MyUsage hybrid cloud offerings provide customers with greater flexibility and scalability.

In January 2020, AMCS, an Ireland-based technology provider announced the acquisition of Utilibill Pvt. Ltd. For an undisclosed amount.

Key Questions Answered in This Report

1. What was the size of the global utility billing software market in 2023?
2. What is the expected growth rate of the global utility billing software market during 2024-2032?
3. What has been the impact of COVID-19 on the global utility billing software market?
4. What are the key factors driving the global utility billing software market?
5. What is the breakup of the global utility billing software market based on the deployment mode?
6. What is the breakup of the global utility billing software market based on the end user?

7. What are the key regions in the global utility billing software market?
8. Who are the key players/companies in the global utility billing software market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL UTILITY BILLING SOFTWARE MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY DEPLOYMENT MODE

- 6.1 On-premises
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Cloud-based
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast

7 MARKET BREAKUP BY TYPE

7.1 Platform as a Service

7.1.1 Market Trends

7.1.2 Market Forecast

7.2 Infrastructure as a Service

7.2.1 Market Trends

7.2.2 Market Forecast

7.3 Software as a Service

7.3.1 Market Trends

7.3.2 Market Forecast

8 MARKET BREAKUP BY END USER

8.1 Water

8.1.1 Market Trends

8.1.2 Market Forecast

8.2 Power Distribution

8.2.1 Market Trends

8.2.2 Market Forecast

8.3 Oil and Gas

8.3.1 Market Trends

8.3.2 Market Forecast

8.4 Telecommunication

8.4.1 Market Trends

8.4.2 Market Forecast

8.5 Others

8.5.1 Market Trends

8.5.2 Market Forecast

9 MARKET BREAKUP BY REGION

9.1 North America

9.1.1 United States

9.1.1.1 Market Trends

9.1.1.2 Market Forecast

9.1.2 Canada

9.1.2.1 Market Trends

9.1.2.2 Market Forecast

9.2 Asia-Pacific

9.2.1 China

9.2.1.1 Market Trends

9.2.1.2 Market Forecast

9.2.2 Japan

9.2.2.1 Market Trends

9.2.2.2 Market Forecast

9.2.3 India

9.2.3.1 Market Trends

9.2.3.2 Market Forecast

9.2.4 South Korea

9.2.4.1 Market Trends

9.2.4.2 Market Forecast

9.2.5 Australia

9.2.5.1 Market Trends

9.2.5.2 Market Forecast

9.2.6 Indonesia

9.2.6.1 Market Trends

9.2.6.2 Market Forecast

9.2.7 Others

9.2.7.1 Market Trends

9.2.7.2 Market Forecast

9.3 Europe

9.3.1 Germany

9.3.1.1 Market Trends

9.3.1.2 Market Forecast

9.3.2 France

9.3.2.1 Market Trends

9.3.2.2 Market Forecast

9.3.3 United Kingdom

9.3.3.1 Market Trends

9.3.3.2 Market Forecast

9.3.4 Italy

9.3.4.1 Market Trends

9.3.4.2 Market Forecast

9.3.5 Spain

9.3.5.1 Market Trends

9.3.5.2 Market Forecast

9.3.6 Russia

9.3.6.1 Market Trends

9.3.6.2 Market Forecast

9.3.7 Others

9.3.7.1 Market Trends

9.3.7.2 Market Forecast

9.4 Latin America

9.4.1 Brazil

9.4.1.1 Market Trends

9.4.1.2 Market Forecast

9.4.2 Mexico

9.4.2.1 Market Trends

9.4.2.2 Market Forecast

9.4.3 Others

9.4.3.1 Market Trends

9.4.3.2 Market Forecast

9.5 Middle East and Africa

9.5.1 Market Trends

9.5.2 Market Breakup by Country

9.5.3 Market Forecast

10 SWOT ANALYSIS

10.1 Overview

10.2 Strengths

10.3 Weaknesses

10.4 Opportunities

10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTERS FIVE FORCES ANALYSIS

12.1 Overview

12.2 Bargaining Power of Buyers

12.3 Bargaining Power of Suppliers

12.4 Degree of Competition

12.5 Threat of New Entrants

12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

14.1 Market Structure

14.2 Key Players

14.3 Profiles of Key Players

14.3.1 Continental Utility Solutions Inc.

14.3.1.1 Company Overview

14.3.1.2 Product Portfolio

14.3.2 ePsolutions Inc.

14.3.2.1 Company Overview

14.3.2.2 Product Portfolio

14.3.3 Exceleron Software

14.3.3.1 Company Overview

14.3.3.2 Product Portfolio

14.3.4 Harris Computer (Constellation Software Inc.)

14.3.4.1 Company Overview

14.3.4.2 Product Portfolio

14.3.5 Jayhawk Software Inc.

14.3.5.1 Company Overview

14.3.5.2 Product Portfolio

14.3.6 Jendev Corporation

14.3.6.1 Company Overview

14.3.6.2 Product Portfolio

14.3.7 Methodia Group

14.3.7.1 Company Overview

14.3.7.2 Product Portfolio

14.3.8 Oracle Corporation

14.3.8.1 Company Overview

14.3.8.2 Product Portfolio

14.3.8.3 Financials

14.3.8.4 SWOT Analysis

14.3.9 Sigma Software Solutions Inc.

14.3.9.1 Company Overview

14.3.9.2 Product Portfolio

14.3.10 SkyBill SIA

14.3.10.1 Company Overview

14.3.10.2 Product Portfolio

14.3.11 Utilibill Pvt. Ltd.

14.3.11.1 Company Overview

14.3.11.2 Product Portfolio

List Of Tables

LIST OF TABLES

Table 1: Global: Utility Billing Software Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Utility Billing Software Market Forecast: Breakup by Deployment Mode (in Million US\$), 2024-2032

Table 3: Global: Utility Billing Software Market Forecast: Breakup by Type (in Million US\$), 2024-2032

Table 4: Global: Utility Billing Software Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 5: Global: Utility Billing Software Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Utility Billing Software Market: Competitive Structure

Table 7: Global: Utility Billing Software Market: Key Players

List Of Figures

LIST OF FIGURES

- Figure 1: Global: Utility Billing Software Market: Major Drivers and Challenges
- Figure 2: Global: Utility Billing Software Market: Sales Value (in Billion US\$), 2018-2023
- Figure 3: Global: Utility Billing Software Market Forecast: Sales Value (in Billion US\$), 2024-2032
- Figure 4: Global: Utility Billing Software Market: Breakup by Deployment Mode (in %), 2023
- Figure 5: Global: Utility Billing Software Market: Breakup by Type (in %), 2023
- Figure 6: Global: Utility Billing Software Market: Breakup by End User (in %), 2023
- Figure 7: Global: Utility Billing Software Market: Breakup by Region (in %), 2023
- Figure 8: Global: Utility Billing Software (On-premises) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 9: Global: Utility Billing Software (On-premises) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 10: Global: Utility Billing Software (Cloud-based) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 11: Global: Utility Billing Software (Cloud-based) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 12: Global: Utility Billing Software (Platform as a Service) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 13: Global: Utility Billing Software (Platform as a Service) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 14: Global: Utility Billing Software (Infrastructure as a Service) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 15: Global: Utility Billing Software (Infrastructure as a Service) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 16: Global: Utility Billing Software (Software as a Service) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 17: Global: Utility Billing Software (Software as a Service) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 18: Global: Utility Billing Software (Water) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 19: Global: Utility Billing Software (Water) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 20: Global: Utility Billing Software (Power Distribution) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Utility Billing Software (Power Distribution) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Utility Billing Software (Oil and Gas) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Utility Billing Software (Oil and Gas) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Utility Billing Software (Telecommunication) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: Global: Utility Billing Software (Telecommunication) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Utility Billing Software (Other End Users) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Global: Utility Billing Software (Other End Users) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: North America: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: North America: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: United States: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: United States: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: Canada: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Canada: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Asia-Pacific: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Asia-Pacific: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: China: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: China: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Japan: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 39: Japan: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: India: Utility Billing Software Market: Sales Value (in Million US\$), 2018 &

2023

Figure 41: India: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: South Korea: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: South Korea: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Australia: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Australia: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: Indonesia: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: Indonesia: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: Others: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: Others: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Europe: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Europe: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: Germany: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: Germany: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: France: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: France: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: United Kingdom: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: United Kingdom: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: Italy: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: Italy: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: Spain: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Spain: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Russia: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Russia: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Others: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Others: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: Latin America: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: Latin America: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: Brazil: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: Brazil: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Mexico: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Mexico: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Others: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Others: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Middle East and Africa: Utility Billing Software Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Middle East and Africa: Utility Billing Software Market: Breakup by Country (in %), 2023

Figure 76: Middle East and Africa: Utility Billing Software Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 77: Global: Utility Billing Software Industry: SWOT Analysis

Figure 78: Global: Utility Billing Software Industry: Value Chain Analysis

Figure 79: Global: Utility Billing Software Industry: Porter's Five Forces Analysis

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