

Global Residential Smart Water Metering Market Growth 2026-2032

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Abstracts

The global Residential Smart Water Metering market size is predicted to grow from US\$ 3839 million in 2025 to US\$ 7486 million in 2032; it is expected to grow at a CAGR of 10.1% from 2026 to 2032.

Residential Smart Water Metering refers to intelligent water metering devices and associated metering systems designed for houses, apartments, residential communities and other household water-service connections, integrating consumption measurement, data acquisition, remote communication and intelligent water-management functions. The underlying metering technology may be mechanical, ultrasonic, volumetric or another static measurement architecture, while communication technologies such as NB-IoT, LTE-M/Cat.1, LoRa/LoRaWAN, Wireless M-Bus, RF mesh and wired M-Bus enable consumption and operating data to be transmitted automatically to utility AMR, AMI, billing and smart-water platforms. Compared with conventional mechanical residential meters, smart residential meters can provide automatic remote reading together with functions such as leakage monitoring, continuous low-flow detection, reverse-flow identification, burst alarms, tamper alerts, battery-status monitoring, historical data logging and, for selected models, remote valve control. These products are primarily installed at individual household connections and residential properties, helping water utilities reduce manual meter-reading costs, improve billing efficiency, identify customer-side leakage and build more granular consumption databases. The market is increasingly evolving from basic remotely readable meters toward connected water-network endpoints combining metrology, communications, sensing and analytics.

Key Findings

In 2025, global Residential Smart Water Metering production reached approximately

87.21 million units, with an average global market price of around US\$45 per unit

Residential applications represent the largest volume segment of the global smart water meter market

Mechanical smart meters remain widely deployed, while ultrasonic meters are gaining importance in new smart-metering programs

AMI connectivity, leakage monitoring and integrated communications are becoming key product differentiation factors

Market Trends

Residential Smart Water Metering is evolving from electronically readable mechanical meters toward highly integrated digital endpoints combining metrology, communications, sensing and analytics. Mechanical smart meters remain important because of their established installed base, mature manufacturing processes and competitive cost, while ultrasonic meters are gaining momentum as utilities seek static measurement, improved low-flow performance and reduced exposure to mechanical wear. Badger Meter's residential E-Series uses solid-state ultrasonic technology without moving measuring parts, while Kamstrup's flowIQ platform integrates ultrasonic metering, remote communication and acoustic leakage detection within the meter. Diehl Metering is similarly extending its HYDRUS domestic smart meter across multiple communication ecosystems. At the system level, AMI is becoming more important than basic one-way automated reading because utilities increasingly require regular interval data, alarm management, remote diagnostics and integration with billing and network-management platforms. Product differentiation is therefore shifting toward integrated communication, low-power electronics, leakage identification, bidirectional data exchange, modular software compatibility and lifecycle reliability. Composite meter bodies, environmentally resistant enclosures and embedded connectivity are also becoming increasingly important as utilities seek lower maintenance requirements and simpler deployment.

Market Dynamics

Drivers

The principal growth drivers are modernization of residential water infrastructure,

expansion of AMR and AMI systems, increasing pressure on utilities to reduce manual meter-reading costs and stronger demand for leakage and non-revenue-water management. Residential connections account for a very large number of utility endpoints, making household metering one of the most scalable areas for smart-water investment. Connected meters enable utilities to automate meter reading, reduce estimated billing, identify abnormal consumption and provide customers with more timely information about their water use. The move toward more frequent consumption data also supports leakage detection and customer-service improvement. Kamstrup's residential platform, for example, combines remote reading with consumption history and leakage-related alarms, while Diehl Metering positions domestic ultrasonic meters as connected smart-city devices capable of transmitting accurate consumption data into utility management systems. In addition, aging meter fleets in mature markets and continuing urban residential development in emerging markets provide simultaneous replacement and new-installation demand.

Restraints

Residential smart water meters face constraints from installation cost, long replacement cycles, communication fragmentation and utility procurement sensitivity. Compared with conventional mechanical meters, connected products require electronic modules, batteries, communication certification, software integration and lifecycle support, increasing product and deployment complexity. Water utilities also operate heterogeneous legacy meter fleets and IT architectures, which can make large-scale migration to a new communication platform technically and operationally challenging. Cellular, RF mesh, LoRaWAN, Wireless M-Bus and other technologies differ significantly across countries and utility networks, limiting global product standardization. Battery life and communication reliability are particularly important because residential meters may remain in service for many years in pits, basements or other difficult environments. Utilities generally prioritize whole-life operating cost and field reliability over feature accumulation, meaning premium functions must demonstrate clear operational value. Competition from low-cost mechanical smart meters can also slow ultrasonic or more highly integrated product adoption in price-sensitive markets.

Opportunities

The strongest opportunities lie in replacement of conventional mechanical meters, migration from AMR to AMI, adoption of ultrasonic static metrology and deeper integration between residential meters and smart-water platforms. Ultrasonic residential meters can offer attractive lifecycle advantages in applications where utilities value low-flow measurement, stable long-term accuracy and the absence of moving measuring

components. Badger Meter, Kamstrup and Diehl Metering have all developed residential ultrasonic products specifically around connected water-management use cases, illustrating the strategic direction of the market. Valve-controlled meters provide additional opportunities in prepaid applications, rental housing and remotely managed residential accounts, while non-valve configurations remain suitable for utilities prioritizing simple and reliable metering. A further opportunity is the transformation of the meter into a distributed network-sensing node. Leakage indicators, temperature information, flow anomalies and other operating data can enhance network visibility and support proactive maintenance, increasing the value of the meter beyond billing alone.

Challenges

The industry faces challenges in balancing cost, connectivity, battery life, measurement performance and cybersecurity over a long equipment lifecycle. Smart residential meters must remain accurate and operational in demanding environments while communication standards and network technologies may evolve faster than the physical meter itself. Manufacturers therefore need modular hardware and software architectures capable of supporting long-term compatibility and remote configuration. Cybersecurity and data privacy are also becoming more important as AMI systems connect large populations of meters to utility IT networks. From a manufacturing perspective, ultrasonic products require competency in transducers, acoustic-channel design, signal processing, calibration and electronics, while mechanical smart meters require reliable integration between the base meter and electronic communication module. Utility procurement also remains highly competitive, particularly in large-scale tenders where small differences in hardware cost can materially influence purchasing decisions. Successful suppliers must therefore combine metrology expertise, manufacturing scale, communications capability and platform interoperability rather than competing on meter hardware alone.

Industry Chain Analysis

The upstream industry chain includes meter bodies, brass and engineering plastics, mechanical measuring elements, ultrasonic transducers, electromagnetic sensing components, metering and communication chips, printed circuit boards, batteries, RF modules, displays, valves, seals and other electronic and structural components. Midstream manufacturers integrate the measuring mechanism with electronics, embedded firmware and communication modules and perform calibration, sealing, pressure testing and connectivity configuration. Mechanical smart-meter suppliers focus on integration of mature mechanical metrology with communication modules, while

ultrasonic suppliers add transducer, acoustic-path and signal-processing capabilities. Ningbo Water Meter Group, for example, maintains separate residential, smart, ultrasonic, valve-control and AMR/AMI product portfolios, demonstrating the convergence of traditional water-meter manufacturing and smart connectivity. Downstream customers primarily include municipal water utilities, regional water companies, residential developers, property managers and AMI operators. Value creation is progressively moving from the meter body itself toward metrology performance, communication reliability, network deployment, device management, analytics and lifecycle services.

Segment Insights

By metering technology, Residential Smart Water Metering can be divided into Mechanical Smart Water Meters, Ultrasonic Smart Water Meters and Electromagnetic Smart Water Meters. Mechanical smart meters remain an important segment because they combine a mature metering mechanism with communication modules and provide a relatively economical route to automated reading. Ultrasonic smart meters represent the most important technology-upgrade direction, particularly in markets emphasizing static measurement, low-flow sensitivity, long-term stability and advanced AMI functionality. Products such as Badger Meter E-Series, Kamstrup flowIQ and Diehl HYDRUS demonstrate how residential ultrasonic meters are increasingly designed as fully connected smart-water endpoints rather than conventional meters with add-on radio modules. Electromagnetic smart meters occupy a more specialized position in residential applications because their technical architecture and cost structure have historically been better suited to larger or specific metering applications, although compact electronic designs provide opportunities in selected projects. A second useful segmentation is by communication architecture, including cellular IoT, LoRa/LoRaWAN, Wireless M-Bus, RF mesh and wired systems, because communication strategy increasingly determines meter configuration, procurement requirements and utility system compatibility.

Downstream Market Opportunities

Residential utilities and municipal water companies form the core customer base, with the most significant opportunities arising from large-scale replacement of manually read meters and earlier generations of AMR devices. Detached houses and apartment communities require reliable billing and leakage identification, while multi-family residential properties also benefit from centralized data collection and simplified property management. Advanced residential AMI projects increasingly use meter data

for customer engagement, abnormal-use alerts and demand analysis, expanding the meter's role beyond billing. New residential developments create opportunities for integrated deployment from the outset, while mature markets are dominated by replacement and communications-upgrade programs. The combination of smart meters with customer portals, mobile applications, leakage management and utility analytics can increase the value captured across the downstream ecosystem and encourage utilities to evaluate meter suppliers based on complete lifecycle performance rather than hardware price alone.

Regional Insights

North America is an important residential smart-metering market because water utilities have widely adopted automated and advanced metering architectures and continue to upgrade legacy meter fleets toward connected systems. Badger Meter and Itron are notable participants in the region, with competition increasingly centered on AMI connectivity, utility software integration and static metering. Europe has a mature metering and regulatory environment and is particularly active in ultrasonic residential metering, Wireless M-Bus, LoRaWAN and other interoperable communication technologies. Kamstrup and Diehl Metering are representative suppliers with established domestic smart-meter portfolios and integrated communication capabilities. China represents one of the largest manufacturing and deployment bases for residential smart water meters, supported by extensive municipal water infrastructure and domestic suppliers with mechanical, ultrasonic, valve-controlled and AMR/AMI product portfolios. Ningbo Water Meter Group illustrates the breadth of this domestic product ecosystem. Japan and South Korea emphasize reliability and lifecycle performance, while Southeast Asia, Latin America, the Middle East and Africa remain longer-term expansion markets as water utilities progressively adopt automated reading and digital-water management.

Competitive Landscape Analysis

The competitive landscape includes global smart-metering groups, specialist water-meter manufacturers and a broad base of Chinese and regional producers. Core international participants include Badger Meter, Kamstrup, Diehl Metering, Itron, Landis+Gyr, Apator, Sensus/Xylem and Axioma Metering, while the Chinese manufacturer pool includes Ningbo Water Meter Group, Sanchuan Wisdom, Suntront Technology, Huizhong Instrumentation and Metrum Technology, among other established smart-water-meter suppliers. Badger Meter competes through residential ultrasonic metering and smart-water connectivity, Kamstrup combines ultrasonic

metrology with integrated communications and leakage monitoring, and Diehl Metering positions HYDRUS within a broad interoperable smart-metering architecture. Chinese manufacturers compete through scale manufacturing, communication customization, valve-controlled products and integration with domestic utility platforms. The basis of competition is shifting from conventional measurement accuracy toward a broader combination of low-flow performance, communication reliability, battery life, software interoperability, leakage analytics, cybersecurity and lifecycle service capability. Mechanical-meter production scale remains important for cost competitiveness, while ultrasonic technology and AMI integration increasingly determine positioning in higher-value residential replacement programs.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Residential Smart Water Metering Industry Forecast” looks at past sales and reviews total world Residential Smart Water Metering sales in 2025, providing a comprehensive analysis by region and market sector of projected Residential Smart Water Metering sales for 2026 through 2032. With Residential Smart Water Metering sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Residential Smart Water Metering industry.

This Insight Report provides a comprehensive analysis of the global Residential Smart Water Metering landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Residential Smart Water Metering portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Residential Smart Water Metering market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Residential Smart Water Metering and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Residential Smart Water Metering.

This report presents a comprehensive overview, market shares, and growth opportunities of Residential Smart Water Metering market by product type, application,

key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Mechanical Type

Ultrasonic Type

Electromagnetic Type

Segmentation by Diameter:

DN40–DN80

DN100–DN200

DN250–DN300

Others

Segmentation by Communication Methods:

NB-IoT

LoRa

LoRaWAN

M-Bus

Wireless M-Bus

4G

Segmentation by Application:

Private Residence

Public Residence

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Honeywell

Hubbell

Badger Meter

Xylem

Itron

Neptune Technology

Schneider Electric

Sagemcom

Kamstrup

Hexcell

Zenner

Diehl Group

Iskraemeco Group

Arad Group

Pietro Fiorentini

Bmeters

Axioma Metering

Landis+Gyr

Apator

Aichi Tokei Denki

Azbil Kimmon

Bingchen Electronics

Wasion Group

Donghai Group

Xili Intelligent

Suntront Technology

Integrated Electronic Systems Lab

Goldcard

Jianghua Group

Jingyuan Zhongke Technology

Hiwits

Viewshine

Sanchuan

Ningbo Water Meter

Ploustock

Metter

Huizhong Instrumentation

Baichuan Water Meter

CHINT

Shenzhen Huaxu Technology

Saida Electronics

Laison Technology

Hanwei Technology

Chongqing Intelligence Water Affairs

Changde Water Meter Manufacture

Jingda Electronic

Huiyi Science and Technology

Lianyungang Water Meter

WPG (Shanghai) Smart Water

Key Questions Addressed in this Report

What is the 10-year outlook for the global Residential Smart Water Metering market?

What factors are driving Residential Smart Water Metering market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Residential Smart Water Metering market opportunities vary by end market size?

How does Residential Smart Water Metering break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

- 2.1 World Market Overview
 - 2.1.1 Global Residential Smart Water Metering Annual Sales 2021-2032
 - 2.1.2 World Current & Future Analysis for Residential Smart Water Metering by Geographic Region, 2021, 2025 & 2032
 - 2.1.3 World Current & Future Analysis for Residential Smart Water Metering by Country/Region, 2021, 2025 & 2032
- 2.2 Residential Smart Water Metering Segment by Type
 - 2.2.1 Mechanical Type
 - 2.2.2 Ultrasonic Type
 - 2.2.3 Electromagnetic Type
 - 2.2.4 Residential Smart Water Metering Sales by Type
 - 2.2.4.1 Global Residential Smart Water Metering Sales Market Share by Type (2021-2026)
 - 2.2.4.2 Global Residential Smart Water Metering Revenue and Market Share by Type (2021-2026)
 - 2.2.4.3 Global Residential Smart Water Metering Sale Price by Type (2021-2026)
- 2.3 Residential Smart Water Metering Segment by Diameter
 - 2.3.1 DN40–DN80
 - 2.3.2 DN100–DN200
 - 2.3.3 DN250–DN300
 - 2.3.4 Others
 - 2.3.5 Residential Smart Water Metering Sales by Diameter
 - 2.3.5.1 Global Residential Smart Water Metering Sales Market Share by Diameter (2021-2026)

2.3.5.2 Global Residential Smart Water Metering Revenue and Market Share by Diameter (2021-2026)

2.3.5.3 Global Residential Smart Water Metering Sale Price by Diameter (2021-2026)

2.4 Residential Smart Water Metering Segment by Communication Methods

2.4.1 NB-IoT

2.4.2 LoRa

2.4.3 LoRaWAN

2.4.4 M-Bus

2.4.5 Wireless M-Bus

2.4.6 4G

2.4.7 Residential Smart Water Metering Sales by Communication Methods

2.4.7.1 Global Residential Smart Water Metering Sales Market Share by Communication Methods (2021-2026)

2.4.7.2 Global Residential Smart Water Metering Revenue and Market Share by Communication Methods (2021-2026)

2.4.7.3 Global Residential Smart Water Metering Sale Price by Communication Methods (2021-2026)

2.5 Residential Smart Water Metering Segment by Application

2.5.1 Private Residence

2.5.2 Public Residence

2.5.3 Residential Smart Water Metering Sales by Application

2.5.3.1 Global Residential Smart Water Metering Sale Market Share by Application (2021-2026)

2.5.3.2 Global Residential Smart Water Metering Revenue and Market Share by Application (2021-2026)

2.5.3.3 Global Residential Smart Water Metering Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Residential Smart Water Metering Breakdown Data by Company

3.1.1 Global Residential Smart Water Metering Annual Sales by Company (2021-2026)

3.1.2 Global Residential Smart Water Metering Sales Market Share by Company (2021-2026)

3.2 Global Residential Smart Water Metering Annual Revenue by Company (2021-2026)

3.2.1 Global Residential Smart Water Metering Revenue by Company (2021-2026)

3.2.2 Global Residential Smart Water Metering Revenue Market Share by Company

(2021-2026)

3.3 Global Residential Smart Water Metering Sale Price by Company

3.4 Key Manufacturers Residential Smart Water Metering Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Residential Smart Water Metering Product Location Distribution

3.4.2 Players Residential Smart Water Metering Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR RESIDENTIAL SMART WATER METERING BY GEOGRAPHIC REGION

4.1 World Historic Residential Smart Water Metering Market Size by Geographic Region (2021-2026)

4.1.1 Global Residential Smart Water Metering Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Residential Smart Water Metering Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Residential Smart Water Metering Market Size by Country/Region (2021-2026)

4.2.1 Global Residential Smart Water Metering Annual Sales by Country/Region (2021-2026)

4.2.2 Global Residential Smart Water Metering Annual Revenue by Country/Region (2021-2026)

4.3 Americas Residential Smart Water Metering Sales Growth

4.4 APAC Residential Smart Water Metering Sales Growth

4.5 Europe Residential Smart Water Metering Sales Growth

4.6 Middle East & Africa Residential Smart Water Metering Sales Growth

5 AMERICAS

5.1 Americas Residential Smart Water Metering Sales by Country

5.1.1 Americas Residential Smart Water Metering Sales by Country (2021-2026)

5.1.2 Americas Residential Smart Water Metering Revenue by Country (2021-2026)

5.2 Americas Residential Smart Water Metering Sales by Type (2021-2026)

5.3 Americas Residential Smart Water Metering Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Residential Smart Water Metering Sales by Region

6.1.1 APAC Residential Smart Water Metering Sales by Region (2021-2026)

6.1.2 APAC Residential Smart Water Metering Revenue by Region (2021-2026)

6.2 APAC Residential Smart Water Metering Sales by Type (2021-2026)

6.3 APAC Residential Smart Water Metering Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Residential Smart Water Metering by Country

7.1.1 Europe Residential Smart Water Metering Sales by Country (2021-2026)

7.1.2 Europe Residential Smart Water Metering Revenue by Country (2021-2026)

7.2 Europe Residential Smart Water Metering Sales by Type (2021-2026)

7.3 Europe Residential Smart Water Metering Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Residential Smart Water Metering by Country

8.1.1 Middle East & Africa Residential Smart Water Metering Sales by Country (2021-2026)

8.1.2 Middle East & Africa Residential Smart Water Metering Revenue by Country (2021-2026)

8.2 Middle East & Africa Residential Smart Water Metering Sales by Type (2021-2026)

8.3 Middle East & Africa Residential Smart Water Metering Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Residential Smart Water Metering

10.3 Manufacturing Process Analysis of Residential Smart Water Metering

10.4 Industry Chain Structure of Residential Smart Water Metering

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Residential Smart Water Metering Distributors

11.3 Residential Smart Water Metering Customer

12 WORLD FORECAST REVIEW FOR RESIDENTIAL SMART WATER METERING BY GEOGRAPHIC REGION

12.1 Global Residential Smart Water Metering Market Size Forecast by Region

12.1.1 Global Residential Smart Water Metering Forecast by Region (2027-2032)

12.1.2 Global Residential Smart Water Metering Annual Revenue Forecast by Region (2027-2032)

- 12.2 Americas Forecast by Country (2027-2032)
- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Residential Smart Water Metering Forecast by Type (2027-2032)
- 12.7 Global Residential Smart Water Metering Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Honeywell

- 13.1.1 Honeywell Company Information
- 13.1.2 Honeywell Residential Smart Water Metering Product Portfolios and Specifications
- 13.1.3 Honeywell Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Honeywell Main Business Overview
- 13.1.5 Honeywell Latest Developments

13.2 Hubbell

- 13.2.1 Hubbell Company Information
- 13.2.2 Hubbell Residential Smart Water Metering Product Portfolios and Specifications
- 13.2.3 Hubbell Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 Hubbell Main Business Overview
- 13.2.5 Hubbell Latest Developments

13.3 Badger Meter

- 13.3.1 Badger Meter Company Information
- 13.3.2 Badger Meter Residential Smart Water Metering Product Portfolios and Specifications
- 13.3.3 Badger Meter Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 Badger Meter Main Business Overview
- 13.3.5 Badger Meter Latest Developments

13.4 Xylem

- 13.4.1 Xylem Company Information
- 13.4.2 Xylem Residential Smart Water Metering Product Portfolios and Specifications
- 13.4.3 Xylem Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.4.4 Xylem Main Business Overview
- 13.4.5 Xylem Latest Developments

13.5 Itron

13.5.1 Itron Company Information

13.5.2 Itron Residential Smart Water Metering Product Portfolios and Specifications

13.5.3 Itron Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Itron Main Business Overview

13.5.5 Itron Latest Developments

13.6 Neptune Technology

13.6.1 Neptune Technology Company Information

13.6.2 Neptune Technology Residential Smart Water Metering Product Portfolios and Specifications

13.6.3 Neptune Technology Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Neptune Technology Main Business Overview

13.6.5 Neptune Technology Latest Developments

13.7 Schneider Electric

13.7.1 Schneider Electric Company Information

13.7.2 Schneider Electric Residential Smart Water Metering Product Portfolios and Specifications

13.7.3 Schneider Electric Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Schneider Electric Main Business Overview

13.7.5 Schneider Electric Latest Developments

13.8 Sagemcom

13.8.1 Sagemcom Company Information

13.8.2 Sagemcom Residential Smart Water Metering Product Portfolios and Specifications

13.8.3 Sagemcom Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Sagemcom Main Business Overview

13.8.5 Sagemcom Latest Developments

13.9 Kamstrup

13.9.1 Kamstrup Company Information

13.9.2 Kamstrup Residential Smart Water Metering Product Portfolios and Specifications

13.9.3 Kamstrup Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Kamstrup Main Business Overview

13.9.5 Kamstrup Latest Developments

13.10 Hexcell

13.10.1 Hexcell Company Information

13.10.2 Hexcell Residential Smart Water Metering Product Portfolios and Specifications

13.10.3 Hexcell Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Hexcell Main Business Overview

13.10.5 Hexcell Latest Developments

13.11 Zenner

13.11.1 Zenner Company Information

13.11.2 Zenner Residential Smart Water Metering Product Portfolios and Specifications

13.11.3 Zenner Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Zenner Main Business Overview

13.11.5 Zenner Latest Developments

13.12 Diehl Group

13.12.1 Diehl Group Company Information

13.12.2 Diehl Group Residential Smart Water Metering Product Portfolios and Specifications

13.12.3 Diehl Group Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Diehl Group Main Business Overview

13.12.5 Diehl Group Latest Developments

13.13 Iskraemeco Group

13.13.1 Iskraemeco Group Company Information

13.13.2 Iskraemeco Group Residential Smart Water Metering Product Portfolios and Specifications

13.13.3 Iskraemeco Group Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Iskraemeco Group Main Business Overview

13.13.5 Iskraemeco Group Latest Developments

13.14 Arad Group

13.14.1 Arad Group Company Information

13.14.2 Arad Group Residential Smart Water Metering Product Portfolios and Specifications

13.14.3 Arad Group Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Arad Group Main Business Overview

- 13.14.5 Arad Group Latest Developments
- 13.15 Pietro Fiorentini
 - 13.15.1 Pietro Fiorentini Company Information
 - 13.15.2 Pietro Fiorentini Residential Smart Water Metering Product Portfolios and Specifications
 - 13.15.3 Pietro Fiorentini Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.15.4 Pietro Fiorentini Main Business Overview
 - 13.15.5 Pietro Fiorentini Latest Developments
- 13.16 Bmeters
 - 13.16.1 Bmeters Company Information
 - 13.16.2 Bmeters Residential Smart Water Metering Product Portfolios and Specifications
 - 13.16.3 Bmeters Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.16.4 Bmeters Main Business Overview
 - 13.16.5 Bmeters Latest Developments
- 13.17 Axioma Metering
 - 13.17.1 Axioma Metering Company Information
 - 13.17.2 Axioma Metering Residential Smart Water Metering Product Portfolios and Specifications
 - 13.17.3 Axioma Metering Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.17.4 Axioma Metering Main Business Overview
 - 13.17.5 Axioma Metering Latest Developments
- 13.18 Landis+Gyr
 - 13.18.1 Landis+Gyr Company Information
 - 13.18.2 Landis+Gyr Residential Smart Water Metering Product Portfolios and Specifications
 - 13.18.3 Landis+Gyr Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Landis+Gyr Main Business Overview
 - 13.18.5 Landis+Gyr Latest Developments
- 13.19 Apator
 - 13.19.1 Apator Company Information
 - 13.19.2 Apator Residential Smart Water Metering Product Portfolios and Specifications
 - 13.19.3 Apator Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Apator Main Business Overview

- 13.19.5 Apator Latest Developments
- 13.20 Aichi Tokei Denki
 - 13.20.1 Aichi Tokei Denki Company Information
 - 13.20.2 Aichi Tokei Denki Residential Smart Water Metering Product Portfolios and Specifications
 - 13.20.3 Aichi Tokei Denki Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Aichi Tokei Denki Main Business Overview
 - 13.20.5 Aichi Tokei Denki Latest Developments
- 13.21 Azbil Kimmon
 - 13.21.1 Azbil Kimmon Company Information
 - 13.21.2 Azbil Kimmon Residential Smart Water Metering Product Portfolios and Specifications
 - 13.21.3 Azbil Kimmon Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.21.4 Azbil Kimmon Main Business Overview
 - 13.21.5 Azbil Kimmon Latest Developments
- 13.22 Bingchen Electronics
 - 13.22.1 Bingchen Electronics Company Information
 - 13.22.2 Bingchen Electronics Residential Smart Water Metering Product Portfolios and Specifications
 - 13.22.3 Bingchen Electronics Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.22.4 Bingchen Electronics Main Business Overview
 - 13.22.5 Bingchen Electronics Latest Developments
- 13.23 Wasion Group
 - 13.23.1 Wasion Group Company Information
 - 13.23.2 Wasion Group Residential Smart Water Metering Product Portfolios and Specifications
 - 13.23.3 Wasion Group Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.23.4 Wasion Group Main Business Overview
 - 13.23.5 Wasion Group Latest Developments
- 13.24 Donghai Group
 - 13.24.1 Donghai Group Company Information
 - 13.24.2 Donghai Group Residential Smart Water Metering Product Portfolios and Specifications
 - 13.24.3 Donghai Group Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.24.4 Donghai Group Main Business Overview
- 13.24.5 Donghai Group Latest Developments
- 13.25 Xili Intelligent
 - 13.25.1 Xili Intelligent Company Information
 - 13.25.2 Xili Intelligent Residential Smart Water Metering Product Portfolios and Specifications
 - 13.25.3 Xili Intelligent Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.25.4 Xili Intelligent Main Business Overview
 - 13.25.5 Xili Intelligent Latest Developments
- 13.26 Suntront Technology
 - 13.26.1 Suntront Technology Company Information
 - 13.26.2 Suntront Technology Residential Smart Water Metering Product Portfolios and Specifications
 - 13.26.3 Suntront Technology Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.26.4 Suntront Technology Main Business Overview
 - 13.26.5 Suntront Technology Latest Developments
- 13.27 Integrated Electronic Systems Lab
 - 13.27.1 Integrated Electronic Systems Lab Company Information
 - 13.27.2 Integrated Electronic Systems Lab Residential Smart Water Metering Product Portfolios and Specifications
 - 13.27.3 Integrated Electronic Systems Lab Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.27.4 Integrated Electronic Systems Lab Main Business Overview
 - 13.27.5 Integrated Electronic Systems Lab Latest Developments
- 13.28 Goldcard
 - 13.28.1 Goldcard Company Information
 - 13.28.2 Goldcard Residential Smart Water Metering Product Portfolios and Specifications
 - 13.28.3 Goldcard Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.28.4 Goldcard Main Business Overview
 - 13.28.5 Goldcard Latest Developments
- 13.29 Jianghua Group
 - 13.29.1 Jianghua Group Company Information
 - 13.29.2 Jianghua Group Residential Smart Water Metering Product Portfolios and Specifications
 - 13.29.3 Jianghua Group Residential Smart Water Metering Sales, Revenue, Price and

Gross Margin (2021-2026)

13.29.4 Jianghua Group Main Business Overview

13.29.5 Jianghua Group Latest Developments

13.30 Jingyuan Zhongke Technology

13.30.1 Jingyuan Zhongke Technology Company Information

13.30.2 Jingyuan Zhongke Technology Residential Smart Water Metering Product

Portfolios and Specifications

13.30.3 Jingyuan Zhongke Technology Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.30.4 Jingyuan Zhongke Technology Main Business Overview

13.30.5 Jingyuan Zhongke Technology Latest Developments

13.31 Hiwits

13.31.1 Hiwits Company Information

13.31.2 Hiwits Residential Smart Water Metering Product Portfolios and Specifications

13.31.3 Hiwits Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.31.4 Hiwits Main Business Overview

13.31.5 Hiwits Latest Developments

13.32 Viewshine

13.32.1 Viewshine Company Information

13.32.2 Viewshine Residential Smart Water Metering Product Portfolios and Specifications

13.32.3 Viewshine Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.32.4 Viewshine Main Business Overview

13.32.5 Viewshine Latest Developments

13.33 Sanchuan

13.33.1 Sanchuan Company Information

13.33.2 Sanchuan Residential Smart Water Metering Product Portfolios and Specifications

13.33.3 Sanchuan Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.33.4 Sanchuan Main Business Overview

13.33.5 Sanchuan Latest Developments

13.34 Ningbo Water Meter

13.34.1 Ningbo Water Meter Company Information

13.34.2 Ningbo Water Meter Residential Smart Water Metering Product Portfolios and Specifications

13.34.3 Ningbo Water Meter Residential Smart Water Metering Sales, Revenue, Price

and Gross Margin (2021-2026)

13.34.4 Ningbo Water Meter Main Business Overview

13.34.5 Ningbo Water Meter Latest Developments

13.35 Ploustock

13.35.1 Ploustock Company Information

13.35.2 Ploustock Residential Smart Water Metering Product Portfolios and Specifications

13.35.3 Ploustock Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.35.4 Ploustock Main Business Overview

13.35.5 Ploustock Latest Developments

13.36 Metter

13.36.1 Metter Company Information

13.36.2 Metter Residential Smart Water Metering Product Portfolios and Specifications

13.36.3 Metter Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.36.4 Metter Main Business Overview

13.36.5 Metter Latest Developments

13.37 Huizhong Instrumentation

13.37.1 Huizhong Instrumentation Company Information

13.37.2 Huizhong Instrumentation Residential Smart Water Metering Product Portfolios and Specifications

13.37.3 Huizhong Instrumentation Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.37.4 Huizhong Instrumentation Main Business Overview

13.37.5 Huizhong Instrumentation Latest Developments

13.38 Baichuan Water Meter

13.38.1 Baichuan Water Meter Company Information

13.38.2 Baichuan Water Meter Residential Smart Water Metering Product Portfolios and Specifications

13.38.3 Baichuan Water Meter Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.38.4 Baichuan Water Meter Main Business Overview

13.38.5 Baichuan Water Meter Latest Developments

13.39 CHINT

13.39.1 CHINT Company Information

13.39.2 CHINT Residential Smart Water Metering Product Portfolios and Specifications

13.39.3 CHINT Residential Smart Water Metering Sales, Revenue, Price and Gross

Margin (2021-2026)

13.39.4 CHINT Main Business Overview

13.39.5 CHINT Latest Developments

13.40 Shenzhen Huaxu Technology

13.40.1 Shenzhen Huaxu Technology Company Information

13.40.2 Shenzhen Huaxu Technology Residential Smart Water Metering Product

Portfolios and Specifications

13.40.3 Shenzhen Huaxu Technology Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.40.4 Shenzhen Huaxu Technology Main Business Overview

13.40.5 Shenzhen Huaxu Technology Latest Developments

13.41 Saida Electronics

13.41.1 Saida Electronics Company Information

13.41.2 Saida Electronics Residential Smart Water Metering Product Portfolios and Specifications

13.41.3 Saida Electronics Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.41.4 Saida Electronics Main Business Overview

13.41.5 Saida Electronics Latest Developments

13.42 Laison Technology

13.42.1 Laison Technology Company Information

13.42.2 Laison Technology Residential Smart Water Metering Product Portfolios and Specifications

13.42.3 Laison Technology Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.42.4 Laison Technology Main Business Overview

13.42.5 Laison Technology Latest Developments

13.43 Hanwei Technology

13.43.1 Hanwei Technology Company Information

13.43.2 Hanwei Technology Residential Smart Water Metering Product Portfolios and Specifications

13.43.3 Hanwei Technology Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.43.4 Hanwei Technology Main Business Overview

13.43.5 Hanwei Technology Latest Developments

13.44 Chongqing Intelligence Water Affairs

13.44.1 Chongqing Intelligence Water Affairs Company Information

13.44.2 Chongqing Intelligence Water Affairs Residential Smart Water Metering Product Portfolios and Specifications

13.44.3 Chongqing Intelligence Water Affairs Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.44.4 Chongqing Intelligence Water Affairs Main Business Overview

13.44.5 Chongqing Intelligence Water Affairs Latest Developments

13.45 Changde Water Meter Manufacture

13.45.1 Changde Water Meter Manufacture Company Information

13.45.2 Changde Water Meter Manufacture Residential Smart Water Metering Product Portfolios and Specifications

13.45.3 Changde Water Meter Manufacture Residential Smart Water Metering Sales, Revenue, Price and Gross Margin (2021-2026)

13.45.4 Changde Water Meter Manufacture Main Business Overview

13.45.5 Changde Water Meter Manufacture Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Residential Smart Water Metering Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Residential Smart Water Metering Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Mechanical Type
- Table 4. Major Players of Ultrasonic Type
- Table 5. Major Players of Electromagnetic Type
- Table 6. Global Residential Smart Water Metering Sales by Type (2021-2026) & (K Units)
- Table 7. Global Residential Smart Water Metering Sales Market Share by Type (2021-2026)
- Table 8. Global Residential Smart Water Metering Revenue by Type (2021-2026) & (\$ million)
- Table 9. Global Residential Smart Water Metering Revenue Market Share by Type (2021-2026)
- Table 10. Global Residential Smart Water Metering Sale Price by Type (2021-2026) & (US\$/Unit)
- Table 11. Major Players of DN40–DN80
- Table 12. Major Players of DN100–DN200
- Table 13. Major Players of DN250–DN300
- Table 14. Major Players of Others
- Table 15. Global Residential Smart Water Metering Sales by Diameter (2021-2026) & (K Units)
- Table 16. Global Residential Smart Water Metering Sales Market Share by Diameter (2021-2026)
- Table 17. Global Residential Smart Water Metering Revenue by Diameter (2021-2026) & (\$ million)
- Table 18. Global Residential Smart Water Metering Revenue Market Share by Diameter (2021-2026)
- Table 19. Global Residential Smart Water Metering Sale Price by Diameter (2021-2026) & (US\$/Unit)
- Table 20. Major Players of NB-IoT
- Table 21. Major Players of LoRa
- Table 22. Major Players of LoRaWAN
- Table 23. Major Players of M-Bus

Table 24. Major Players of Wireless M-Bus

Table 25. Major Players of 4G

Table 26. Global Residential Smart Water Metering Sales by Communication Methods (2021-2026) & (K Units)

Table 27. Global Residential Smart Water Metering Sales Market Share by Communication Methods (2021-2026)

Table 28. Global Residential Smart Water Metering Revenue by Communication Methods (2021-2026) & (\$ million)

Table 29. Global Residential Smart Water Metering Revenue Market Share by Communication Methods (2021-2026)

Table 30. Global Residential Smart Water Metering Sale Price by Communication Methods (2021-2026) & (US\$/Unit)

Table 31. Global Residential Smart Water Metering Sale by Application (2021-2026) & (K Units)

Table 32. Global Residential Smart Water Metering Sale Market Share by Application (2021-2026)

Table 33. Global Residential Smart Water Metering Revenue by Application (2021-2026) & (\$ million)

Table 34. Global Residential Smart Water Metering Revenue Market Share by Application (2021-2026)

Table 35. Global Residential Smart Water Metering Sale Price by Application (2021-2026) & (US\$/Unit)

Table 36. Global Residential Smart Water Metering Sales by Company (2021-2026) & (K Units)

Table 37. Global Residential Smart Water Metering Sales Market Share by Company (2021-2026)

Table 38. Global Residential Smart Water Metering Revenue by Company (2021-2026) & (\$ millions)

Table 39. Global Residential Smart Water Metering Revenue Market Share by Company (2021-2026)

Table 40. Global Residential Smart Water Metering Sale Price by Company (2021-2026) & (US\$/Unit)

Table 41. Key Manufacturers Residential Smart Water Metering Producing Area Distribution and Sales Area

Table 42. Players Residential Smart Water Metering Products Offered

Table 43. Residential Smart Water Metering Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 44. New Products and Potential Entrants

Table 45. Market M&A Activity & Strategy

Table 46. Global Residential Smart Water Metering Sales by Geographic Region (2021-2026) & (K Units)

Table 47. Global Residential Smart Water Metering Sales Market Share Geographic Region (2021-2026)

Table 48. Global Residential Smart Water Metering Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 49. Global Residential Smart Water Metering Revenue Market Share by Geographic Region (2021-2026)

Table 50. Global Residential Smart Water Metering Sales by Country/Region (2021-2026) & (K Units)

Table 51. Global Residential Smart Water Metering Sales Market Share by Country/Region (2021-2026)

Table 52. Global Residential Smart Water Metering Revenue by Country/Region (2021-2026) & (\$ millions)

Table 53. Global Residential Smart Water Metering Revenue Market Share by Country/Region (2021-2026)

Table 54. Americas Residential Smart Water Metering Sales by Country (2021-2026) & (K Units)

Table 55. Americas Residential Smart Water Metering Sales Market Share by Country (2021-2026)

Table 56. Americas Residential Smart Water Metering Revenue by Country (2021-2026) & (\$ millions)

Table 57. Americas Residential Smart Water Metering Sales by Type (2021-2026) & (K Units)

Table 58. Americas Residential Smart Water Metering Sales by Application (2021-2026) & (K Units)

Table 59. APAC Residential Smart Water Metering Sales by Region (2021-2026) & (K Units)

Table 60. APAC Residential Smart Water Metering Sales Market Share by Region (2021-2026)

Table 61. APAC Residential Smart Water Metering Revenue by Region (2021-2026) & (\$ millions)

Table 62. APAC Residential Smart Water Metering Sales by Type (2021-2026) & (K Units)

Table 63. APAC Residential Smart Water Metering Sales by Application (2021-2026) & (K Units)

Table 64. Europe Residential Smart Water Metering Sales by Country (2021-2026) & (K Units)

Table 65. Europe Residential Smart Water Metering Revenue by Country (2021-2026)

& (\$ millions)

Table 66. Europe Residential Smart Water Metering Sales by Type (2021-2026) & (K Units)

Table 67. Europe Residential Smart Water Metering Sales by Application (2021-2026) & (K Units)

Table 68. Middle East & Africa Residential Smart Water Metering Sales by Country (2021-2026) & (K Units)

Table 69. Middle East & Africa Residential Smart Water Metering Revenue Market Share by Country (2021-2026)

Table 70. Middle East & Africa Residential Smart Water Metering Sales by Type (2021-2026) & (K Units)

Table 71. Middle East & Africa Residential Smart Water Metering Sales by Application (2021-2026) & (K Units)

Table 72. Key Market Drivers & Growth Opportunities of Residential Smart Water Metering

Table 73. Key Market Challenges & Risks of Residential Smart Water Metering

Table 74. Key Industry Trends of Residential Smart Water Metering

Table 75. Residential Smart Water Metering Raw Material

Table 76. Key Suppliers of Raw Materials

Table 77. Residential Smart Water Metering Distributors List

Table 78. Residential Smart Water Metering Customer List

Table 79. Global Residential Smart Water Metering Sales Forecast by Region (2027-2032) & (K Units)

Table 80. Global Residential Smart Water Metering Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Americas Residential Smart Water Metering Sales Forecast by Country (2027-2032) & (K Units)

Table 82. Americas Residential Smart Water Metering Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. APAC Residential Smart Water Metering Sales Forecast by Region (2027-2032) & (K Units)

Table 84. APAC Residential Smart Water Metering Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 85. Europe Residential Smart Water Metering Sales Forecast by Country (2027-2032) & (K Units)

Table 86. Europe Residential Smart Water Metering Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. Middle East & Africa Residential Smart Water Metering Sales Forecast by Country (2027-2032) & (K Units)

Table 88. Middle East & Africa Residential Smart Water Metering Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 89. Global Residential Smart Water Metering Sales Forecast by Type (2027-2032) & (K Units)

Table 90. Global Residential Smart Water Metering Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 91. Global Residential Smart Water Metering Sales Forecast by Application (2027-2032) & (K Units)

Table 92. Global Residential Smart Water Metering Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 93. Honeywell Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 94. Honeywell Residential Smart Water Metering Product Portfolios and Specifications

Table 95. Honeywell Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 96. Honeywell Main Business

Table 97. Honeywell Latest Developments

Table 98. Hubbell Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 99. Hubbell Residential Smart Water Metering Product Portfolios and Specifications

Table 100. Hubbell Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 101. Hubbell Main Business

Table 102. Hubbell Latest Developments

Table 103. Badger Meter Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 104. Badger Meter Residential Smart Water Metering Product Portfolios and Specifications

Table 105. Badger Meter Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 106. Badger Meter Main Business

Table 107. Badger Meter Latest Developments

Table 108. Xylem Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 109. Xylem Residential Smart Water Metering Product Portfolios and Specifications

Table 110. Xylem Residential Smart Water Metering Sales (K Units), Revenue (\$

Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 111. Xylem Main Business

Table 112. Xylem Latest Developments

Table 113. Itron Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 114. Itron Residential Smart Water Metering Product Portfolios and Specifications

Table 115. Itron Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 116. Itron Main Business

Table 117. Itron Latest Developments

Table 118. Neptune Technology Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 119. Neptune Technology Residential Smart Water Metering Product Portfolios and Specifications

Table 120. Neptune Technology Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 121. Neptune Technology Main Business

Table 122. Neptune Technology Latest Developments

Table 123. Schneider Electric Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 124. Schneider Electric Residential Smart Water Metering Product Portfolios and Specifications

Table 125. Schneider Electric Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 126. Schneider Electric Main Business

Table 127. Schneider Electric Latest Developments

Table 128. Sagemcom Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 129. Sagemcom Residential Smart Water Metering Product Portfolios and Specifications

Table 130. Sagemcom Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 131. Sagemcom Main Business

Table 132. Sagemcom Latest Developments

Table 133. Kamstrup Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 134. Kamstrup Residential Smart Water Metering Product Portfolios and Specifications

Table 135. Kamstrup Residential Smart Water Metering Sales (K Units), Revenue (\$

Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 136. Kamstrup Main Business

Table 137. Kamstrup Latest Developments

Table 138. Hexcell Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 139. Hexcell Residential Smart Water Metering Product Portfolios and Specifications

Table 140. Hexcell Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 141. Hexcell Main Business

Table 142. Hexcell Latest Developments

Table 143. Zenner Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 144. Zenner Residential Smart Water Metering Product Portfolios and Specifications

Table 145. Zenner Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 146. Zenner Main Business

Table 147. Zenner Latest Developments

Table 148. Diehl Group Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 149. Diehl Group Residential Smart Water Metering Product Portfolios and Specifications

Table 150. Diehl Group Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 151. Diehl Group Main Business

Table 152. Diehl Group Latest Developments

Table 153. Iskraemeco Group Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 154. Iskraemeco Group Residential Smart Water Metering Product Portfolios and Specifications

Table 155. Iskraemeco Group Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 156. Iskraemeco Group Main Business

Table 157. Iskraemeco Group Latest Developments

Table 158. Arad Group Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 159. Arad Group Residential Smart Water Metering Product Portfolios and Specifications

Table 160. Arad Group Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 161. Arad Group Main Business

Table 162. Arad Group Latest Developments

Table 163. Pietro Fiorentini Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 164. Pietro Fiorentini Residential Smart Water Metering Product Portfolios and Specifications

Table 165. Pietro Fiorentini Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 166. Pietro Fiorentini Main Business

Table 167. Pietro Fiorentini Latest Developments

Table 168. Bmeters Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 169. Bmeters Residential Smart Water Metering Product Portfolios and Specifications

Table 170. Bmeters Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 171. Bmeters Main Business

Table 172. Bmeters Latest Developments

Table 173. Axioma Metering Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 174. Axioma Metering Residential Smart Water Metering Product Portfolios and Specifications

Table 175. Axioma Metering Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 176. Axioma Metering Main Business

Table 177. Axioma Metering Latest Developments

Table 178. Landis+Gyr Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 179. Landis+Gyr Residential Smart Water Metering Product Portfolios and Specifications

Table 180. Landis+Gyr Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 181. Landis+Gyr Main Business

Table 182. Landis+Gyr Latest Developments

Table 183. Apator Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 184. Apator Residential Smart Water Metering Product Portfolios and

Specifications

Table 185. Apator Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 186. Apator Main Business

Table 187. Apator Latest Developments

Table 188. Aichi Tokei Denki Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 189. Aichi Tokei Denki Residential Smart Water Metering Product Portfolios and Specifications

Table 190. Aichi Tokei Denki Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 191. Aichi Tokei Denki Main Business

Table 192. Aichi Tokei Denki Latest Developments

Table 193. Azbil Kimmon Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 194. Azbil Kimmon Residential Smart Water Metering Product Portfolios and Specifications

Table 195. Azbil Kimmon Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 196. Azbil Kimmon Main Business

Table 197. Azbil Kimmon Latest Developments

Table 198. Bingchen Electronics Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 199. Bingchen Electronics Residential Smart Water Metering Product Portfolios and Specifications

Table 200. Bingchen Electronics Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 201. Bingchen Electronics Main Business

Table 202. Bingchen Electronics Latest Developments

Table 203. Wasion Group Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 204. Wasion Group Residential Smart Water Metering Product Portfolios and Specifications

Table 205. Wasion Group Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 206. Wasion Group Main Business

Table 207. Wasion Group Latest Developments

Table 208. Donghai Group Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 209. Donghai Group Residential Smart Water Metering Product Portfolios and Specifications

Table 210. Donghai Group Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 211. Donghai Group Main Business

Table 212. Donghai Group Latest Developments

Table 213. Xili Intelligent Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 214. Xili Intelligent Residential Smart Water Metering Product Portfolios and Specifications

Table 215. Xili Intelligent Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 216. Xili Intelligent Main Business

Table 217. Xili Intelligent Latest Developments

Table 218. Suntront Technology Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 219. Suntront Technology Residential Smart Water Metering Product Portfolios and Specifications

Table 220. Suntront Technology Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 221. Suntront Technology Main Business

Table 222. Suntront Technology Latest Developments

Table 223. Integrated Electronic Systems Lab Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 224. Integrated Electronic Systems Lab Residential Smart Water Metering Product Portfolios and Specifications

Table 225. Integrated Electronic Systems Lab Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 226. Integrated Electronic Systems Lab Main Business

Table 227. Integrated Electronic Systems Lab Latest Developments

Table 228. Goldcard Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 229. Goldcard Residential Smart Water Metering Product Portfolios and Specifications

Table 230. Goldcard Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 231. Goldcard Main Business

Table 232. Goldcard Latest Developments

Table 233. Jianghua Group Basic Information, Residential Smart Water Metering

Manufacturing Base, Sales Area and Its Competitors

Table 234. Jianghua Group Residential Smart Water Metering Product Portfolios and Specifications

Table 235. Jianghua Group Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 236. Jianghua Group Main Business

Table 237. Jianghua Group Latest Developments

Table 238. Jingyuan Zhongke Technology Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 239. Jingyuan Zhongke Technology Residential Smart Water Metering Product Portfolios and Specifications

Table 240. Jingyuan Zhongke Technology Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 241. Jingyuan Zhongke Technology Main Business

Table 242. Jingyuan Zhongke Technology Latest Developments

Table 243. Hiwits Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 244. Hiwits Residential Smart Water Metering Product Portfolios and Specifications

Table 245. Hiwits Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 246. Hiwits Main Business

Table 247. Hiwits Latest Developments

Table 248. Viewshine Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 249. Viewshine Residential Smart Water Metering Product Portfolios and Specifications

Table 250. Viewshine Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 251. Viewshine Main Business

Table 252. Viewshine Latest Developments

Table 253. Sanchuan Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 254. Sanchuan Residential Smart Water Metering Product Portfolios and Specifications

Table 255. Sanchuan Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 256. Sanchuan Main Business

Table 257. Sanchuan Latest Developments

Table 258. Ningbo Water Meter Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 259. Ningbo Water Meter Residential Smart Water Metering Product Portfolios and Specifications

Table 260. Ningbo Water Meter Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 261. Ningbo Water Meter Main Business

Table 262. Ningbo Water Meter Latest Developments

Table 263. Ploustock Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 264. Ploustock Residential Smart Water Metering Product Portfolios and Specifications

Table 265. Ploustock Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 266. Ploustock Main Business

Table 267. Ploustock Latest Developments

Table 268. Metter Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 269. Metter Residential Smart Water Metering Product Portfolios and Specifications

Table 270. Metter Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 271. Metter Main Business

Table 272. Metter Latest Developments

Table 273. Huizhong Instrumentation Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 274. Huizhong Instrumentation Residential Smart Water Metering Product Portfolios and Specifications

Table 275. Huizhong Instrumentation Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 276. Huizhong Instrumentation Main Business

Table 277. Huizhong Instrumentation Latest Developments

Table 278. Baichuan Water Meter Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 279. Baichuan Water Meter Residential Smart Water Metering Product Portfolios and Specifications

Table 280. Baichuan Water Meter Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 281. Baichuan Water Meter Main Business

Table 282. Baichuan Wate Meter Latest Developments
Table 283. CHINT Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors
Table 284. CHINT Residential Smart Water Metering Product Portfolios and Specifications
Table 285. CHINT Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 286. CHINT Main Business
Table 287. CHINT Latest Developments
Table 288. Shenzhen Huaxu Technology Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors
Table 289. Shenzhen Huaxu Technology Residential Smart Water Metering Product Portfolios and Specifications
Table 290. Shenzhen Huaxu Technology Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 291. Shenzhen Huaxu Technology Main Business
Table 292. Shenzhen Huaxu Technology Latest Developments
Table 293. Saida Electronics Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors
Table 294. Saida Electronics Residential Smart Water Metering Product Portfolios and Specifications
Table 295. Saida Electronics Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 296. Saida Electronics Main Business
Table 297. Saida Electronics Latest Developments
Table 298. Laison Technology Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors
Table 299. Laison Technology Residential Smart Water Metering Product Portfolios and Specifications
Table 300. Laison Technology Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)
Table 301. Laison Technology Main Business
Table 302. Laison Technology Latest Developments
Table 303. Hanwei Technology Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors
Table 304. Hanwei Technology Residential Smart Water Metering Product Portfolios and Specifications
Table 305. Hanwei Technology Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 306. Hanwei Technology Main Business

Table 307. Hanwei Technology Latest Developments

Table 308. Chongqing Intelligence Water Affairs Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 309. Chongqing Intelligence Water Affairs Residential Smart Water Metering Product Portfolios and Specifications

Table 310. Chongqing Intelligence Water Affairs Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 311. Chongqing Intelligence Water Affairs Main Business

Table 312. Chongqing Intelligence Water Affairs Latest Developments

Table 313. Changde Water Meter Manufacture Basic Information, Residential Smart Water Metering Manufacturing Base, Sales Area and Its Competitors

Table 314. Changde Water Meter Manufacture Residential Smart Water Metering Product Portfolios and Specifications

Table 315. Changde Water Meter Manufacture Residential Smart Water Metering Sales (K Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 316. Changde Water Meter Manufacture Main Business

Table 317. Changde Water Meter Manufacture Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Residential Smart Water Metering
- Figure 2. Residential Smart Water Metering Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Residential Smart Water Metering Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Residential Smart Water Metering Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Residential Smart Water Metering Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Residential Smart Water Metering Sales Market Share by Country/Region (2025)
- Figure 10. Residential Smart Water Metering Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Mechanical Type
- Figure 12. Product Picture of Ultrasonic Type
- Figure 13. Product Picture of Electromagnetic Type
- Figure 14. Global Residential Smart Water Metering Sales Market Share by Type in 2026
- Figure 15. Global Residential Smart Water Metering Revenue Market Share by Type (2021-2026)
- Figure 16. Product Picture of DN40–DN80
- Figure 17. Product Picture of DN100–DN200
- Figure 18. Product Picture of DN250–DN300
- Figure 19. Product Picture of Others
- Figure 20. Global Residential Smart Water Metering Sales Market Share by Diameter in 2026
- Figure 21. Global Residential Smart Water Metering Revenue Market Share by Diameter (2021-2026)
- Figure 22. Product Picture of NB-IoT
- Figure 23. Product Picture of LoRa
- Figure 24. Product Picture of LoRaWAN
- Figure 25. Product Picture of M-Bus
- Figure 26. Product Picture of Wireless M-Bus

Figure 27. Product Picture of 4G

Figure 28. Global Residential Smart Water Metering Sales Market Share by Communication Methods in 2026

Figure 29. Global Residential Smart Water Metering Revenue Market Share by Communication Methods (2021-2026)

Figure 30. Residential Smart Water Metering Consumed in Private Residence

Figure 31. Global Residential Smart Water Metering Market: Private Residence (2021-2026) & (K Units)

Figure 32. Residential Smart Water Metering Consumed in Public Residence

Figure 33. Global Residential Smart Water Metering Market: Public Residence (2021-2026) & (K Units)

Figure 34. Global Residential Smart Water Metering Sale Market Share by Application (2025)

Figure 35. Global Residential Smart Water Metering Revenue Market Share by Application in 2025

Figure 36. Residential Smart Water Metering Sales by Company in 2025 (K Units)

Figure 37. Global Residential Smart Water Metering Sales Market Share by Company in 2025

Figure 38. Residential Smart Water Metering Revenue by Company in 2025 (\$ millions)

Figure 39. Global Residential Smart Water Metering Revenue Market Share by Company in 2025

Figure 40. Global Residential Smart Water Metering Sales Market Share by Geographic Region (2021-2026)

Figure 41. Global Residential Smart Water Metering Revenue Market Share by Geographic Region in 2025

Figure 42. Americas Residential Smart Water Metering Sales 2021-2026 (K Units)

Figure 43. Americas Residential Smart Water Metering Revenue 2021-2026 (\$ millions)

Figure 44. APAC Residential Smart Water Metering Sales 2021-2026 (K Units)

Figure 45. APAC Residential Smart Water Metering Revenue 2021-2026 (\$ millions)

Figure 46. Europe Residential Smart Water Metering Sales 2021-2026 (K Units)

Figure 47. Europe Residential Smart Water Metering Revenue 2021-2026 (\$ millions)

Figure 48. Middle East & Africa Residential Smart Water Metering Sales 2021-2026 (K Units)

Figure 49. Middle East & Africa Residential Smart Water Metering Revenue 2021-2026 (\$ millions)

Figure 50. Americas Residential Smart Water Metering Sales Market Share by Country in 2025

Figure 51. Americas Residential Smart Water Metering Revenue Market Share by Country (2021-2026)

Figure 52. Americas Residential Smart Water Metering Sales Market Share by Type (2021-2026)

Figure 53. Americas Residential Smart Water Metering Sales Market Share by Application (2021-2026)

Figure 54

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