

Smart Water Market Forecasts to 2032 – Global Analysis By Component (Hardware, Software and, Services), Deployment Model (Cloud-Based, On-Premise, and Hybrid), Solution, End User, and By Geography

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Abstracts

According to Statistics MRC, the Global Smart Water Market is accounted for \$19.2 billion in 2025 and is expected to reach \$50.6 billion by 2032, growing at a CAGR of 14.8% during the forecast period. Smart water refers to the use of advanced technologies such as sensors, data analytics, and IoT systems to efficiently manage water resources. It focuses on monitoring water quality, detecting leaks, optimizing distribution, and reducing wastage through real-time data insights. By integrating automation and digital solutions, smart water systems help utilities and industries ensure sustainable water management, improve operational efficiency, and support environmental conservation while meeting growing global water demands.

According to the World Bank, approximately 34 billion cubic meters of water are lost through leakage from urban water distribution systems globally every year.

Market Dynamics:

Driver:

Rising water scarcity and need for efficient resource management

The escalating global water crisis, fueled by climate change and population growth, is a primary market driver. This scarcity compels utilities and industries to adopt smart solutions for conservation. Advanced metering infrastructure (AMI) and sensor networks

are critical for detecting leaks, monitoring water quality in real-time and reducing non-revenue water. Furthermore, data analytics enable proactive demand forecasting and optimized distribution. This pressing need to manage a finite resource more effectively is accelerating investments in smart water technologies worldwide, ensuring system resilience and sustainability.

Restraint:

High upfront costs and complex implementation

Deploying advanced sensors, communication networks, and data management platforms involves substantial capital expenditure. Additionally, the integration of these new technologies with legacy water systems is often technically complex and disruptive. Many municipal utilities, particularly in developing regions, face budget constraints and lack the technical expertise for a smooth transition. This financial and operational barrier significantly slows down the adoption rate, especially for smaller-scale operators.

Opportunity:

Smart city initiatives driving adoption

Globally, the proliferation of smart city projects presents a substantial growth opportunity for the smart water market. These initiatives prioritize the integration of digital solutions into urban infrastructure, including water management. Municipalities are increasingly embedding smart water networks as a core utility to enhance citizen services, promote sustainability, and improve operational efficiency. Moreover, government funding and favorable policies for smart urban development are creating a fertile environment for adoption, opening new revenue streams for technology providers and driving market expansion.

Threat:

Cybersecurity attacks on critical water systems

As water infrastructure becomes more connected and data-driven, its vulnerability to cyberattacks emerges as a critical threat. Hackers targeting supervisory control and data acquisition (SCADA) systems can disrupt water supply, manipulate water quality, or disable treatment plants. Such breaches pose severe risks to public health and safety, potentially eroding trust in smart systems. Consequently, the high cost and

complexity of ensuring robust cybersecurity for these critical national assets could deter investment and slow the pace of market growth for some utilities.

Covid-19 Impact:

The pandemic initially disrupted the smart water market, causing supply chain delays and deferring utility capital expenditures as focus shifted to essential services. However, it also underscored the value of remote monitoring and non-revenue water reduction, as utilities operated with limited staff. This crisis accelerated the long-term digital transformation, highlighting the need for resilient, automated infrastructure. The post-pandemic recovery has seen a renewed emphasis on efficiency, positioning the market for a rebound as investments in smart public infrastructure regain priority.

The hardware segment is expected to be the largest during the forecast period

The hardware segment is expected to account for the largest market share during the forecast period is attributed to the fundamental need for physical devices to digitize water networks. This includes smart meters, sensors, and monitoring devices that form the foundational layer of any smart water system. As utilities undertake large-scale rollouts of Advanced Metering Infrastructure (AMI) to replace aging analog meters, the volume of hardware deployment is immense. Additionally, continuous technological upgrades and the essential nature of these components for data collection ensure this segment will continue to account for the largest portion of market revenue.

The cloud-based segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the cloud-based segment is predicted to witness the highest growth rate due to its scalability, cost-effectiveness, and advanced capabilities. Cloud platforms eliminate the need for significant on-premise IT infrastructure, making advanced data analytics accessible to utilities of all sizes. They facilitate the integration of vast datasets from various sources for comprehensive system oversight. Moreover, the flexibility for remote access and software updates aligns perfectly with the industry's shift towards operational agility, driving strong adoption and the highest growth rate in the coming years

Region with largest share:

During the forecast period, the North America region is expected to hold the largest

market share. This leadership is driven by early technological adoption, stringent government regulations on water conservation and quality, and significant funding for modernizing aging water infrastructure. The presence of major market players and a high concentration of smart city projects in the United States and Canada further consolidates its position. Furthermore, high awareness among utilities about the benefits of smart water management sustains continued investment in the region.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR. This explosive growth is fueled by rapid urbanization, severe water stress in many countries, and strong governmental push for smart city initiatives, particularly in China and India. The need to build new, efficient water infrastructure from the ground up, rather than retrofitting old systems, presents a significant advantage. Additionally, rising investments in IoT and digital public utilities are creating a fertile environment for the smart water market to expand at an accelerated pace.

Key players in the market

Some of the key players in Smart Water Market include Xylem Inc., Itron, Inc., Badger Meter, Inc., Diehl Metering GmbH, Kamstrup A/S, Landis+Gyr Group AG, Aclara Technologies LLC, Neptune Technology Group Inc., Mueller Water Products, Inc., Schneider Electric SE, Siemens AG, ABB Ltd, Honeywell International Inc., Oracle Corporation, IBM Corporation, SAP SE, SUEZ, and Veolia Environnement S.A.

Key Developments:

In October 2025, AURELIUS Private Equity agreed to acquire Xylem's international water and heat metering assets outside North America. This carve-out includes the Sensus International division, with operations mainly in Europe. Xylem will continue focusing on its North American smart metering business, maintaining its strategic role there.

In September 2025, Xylem partnered with Amazon to implement smart water management projects in Mexico City and Monterrey, achieving water loss reductions of up to 37% in some areas. The collaboration leverages digital tools for leak detection and pressure management to improve supply reliability in drought-stressed urban regions..

In December 2024, Xylem Inc. expanded its smart water solutions by acquiring a majority stake in Idrica, a water data management and analytics firm. This integration enhances Xylem Vue, a platform using IoT, AI, and machine learning for real-time water system monitoring and optimization to reduce water loss and operational costs.

Components Covered:

Hardware

Software

Services

Deployment Models Covered:

Cloud-Based

On-Premise

Hybrid

Solutions Covered:

Enterprise Asset Management

Network Monitoring & Control

Advanced Water Treatment & Quality Control

Analytics & Data Management

Smart Irrigation Management

Meter Data Management (MDM)

Leak Detection and Pressure Management

Water Quality and Quantity Monitoring

End Users Covered:

Municipal Water Utilities

Industrial

Commercial & Institutional

Agriculture

Residential

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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