

Smart Water Metering Market Forecast to 2028 - COVID-19 Impact and Global Analysis by Type (Automatic Meter Reader and Advanced Metering Infrastructure), Component (Controlling Units, Display Storage & Integrated Software, and Others), Application (Residential and Industrial), and Meter Type (Ultrasonic Meters, Electromagnetic Meters, and Electromechanical Meters)

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Abstracts

The Smart Water Metering market is expected to be valued at US\$ 3,359.84 million in 2022 and is expected to reach US\$ 5,954.65 million by 2028; it is estimated to grow at a CAGR of 10.0% from 2022 to 2028.

Asia Pacific is anticipated to be the third largest region in the smart water metering market in 2022 and is projected to retain its dominance during the forecast period as well. The smart water metering market size in Asia Pacific is likely to undergo a rapid transformation as a result of enhanced focus on metering, market consolidation, and evolving business models in the region. The smart water metering market growth is expected to spike up in Asia Pacific as governments intervene to reduce non-revenue water, lower operational expenditures, and achieve better demand management. Also, metering-as-a-service and static metering technology models are expected to intensify the smart water metering market scenario in Asia. Utilities have realized the importance of increasing cost recovery in ensuring the financial and environmental sustainability of the water supply. Also, healthy investments from the private sector would improve the smart water meter penetration in the region.

China and Australia are anticipated to be the pioneering nations in the commercial deployments of smart water meters in Asia Pacific. Both these countries are intending to capitalize on the emergence of IoT, Big Data, and analytics, thereby harnessing their powers to achieve better results with smart water meters. Further, ambitious digital initiatives in other Southeast Asian countries have spurred strong government support for smart water meter rollout. For instance, Singapore is taking significant steps to promote digital water technologies. In November 2022, Singapore's national water agency PUB started utilizing an Itron industrial IoT network canopy for the smart water metering applications from SP Group. This network would connect ~300,000 C&I and residential smart water meters while promoting water conservation goals. The installation of new water technologies is an integral part of PUB's Smart Water Meter Program that projects to change the organization into a smart utility. The first phase of a smart water meter program will be introduced in Bukit Batok, Jurong West, Hougang, Tampines, and Tuas. Such developments are expected to drive the smart water metering market growth.

The investment involved in installation and deployment of smart water meters is comparatively much higher than that of traditional systems. This is because smart water meters have various advantages in monitoring, checking, and reducing non-revenue water costs. The wired or wireless smart water meters are integrated with sensors, data loggers, communication devices, and data management systems that sense, record, and transfer the data to the cloud or designed storage platform that is usable by the operator at any point in time. In addition, the pipelines range hundreds of miles from water treatment plants to their destination, and the water management authorities need to deploy large numbers of smart meters to monitor the pipelines owing to limited bandwidth. This factor also incurs huge investments. Owing to high initial investments, several developing countries are restraining the deployment of such advanced technologies, negatively impacting the smart water metering market growth.

Water scarcity or illegal tampering or tapping of water is a serious concern prevailing in developed as well as developing countries across the globe. Various governments and private organizations are actively participating in creating awareness among water management authorities of respective countries or areas to mitigate water scarcity problems. However, due to the lack of knowledge among the mass in terms of advanced water management technologies, sufficient deployment of smart water meters is lacking in several areas worldwide. This factor is hindering the smart water metering market growth.

Based on application, the smart water metering market is segmented into residential

and industrial. The residential segment accounted for a larger market share in 2021 and is expected to retain its dominance during the forecast period in the global smart water metering market. The residential sector is one of the most water-consuming sectors in the world. The increase in demand for usable water is directly proportional to the increase in population. Due to the rapid increase in population across the globe, pipeline tampering or unlawful water-tapping practices are conducted heavily. Owing to these factors, the water treatment plants are facing a huge challenge in providing enough usable water to the residential areas. To overcome this challenge, smart water meters are being heavily deployed in residential areas in developed countries and a few developing countries. This is due to the surging demand for water consumption surveillance and increasing requirement for non-revenue water bill generation. The smart meters used for residential purposes are integrated with intelligent alarms, which notify incidences such as leakages, tampering attempts, and reverse flow, thereby reducing water loss and collateral damage. Smart water meters benefit residential areas by automatically recording data and information related to water supply and decrease data collection time, inaccurate readings, and estimated billings.

The key smart water metering market players profiled in the report include Arad Ltd, Badger Meter Inc, Bmeters SRL, Diehl Stiftung & Co KG, Itron Inc, Kamstrup AS, Mueller Water Products Inc, Neptune Technology Group Inc, Sensus USA Inc, and WAVIoT Integrated Systems LLC. In addition to all the players profiled in the report, there are several other global, regional, and local smart water metering market players operating in the market, which were also analyzed and studied during this study to get a holistic view of the entire market. The overall smart water metering market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the market. The process also helps obtain an overview and forecast of the smart water metering market size with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain more analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the smart water metering market.

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