

# **South & Central America Advanced Distributed Management System Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Component (Solutions and Services), Grid Type (Medium Voltage Grid, High Voltage Grid, and Low Voltage Grid), and Vertical (Utilities, Industrial, and Commercial)**

<https://marketpublishers.com/r/S18D2B2535B8EN.html>

Date: March 2026

Pages: 134

Price: US\$ 3,450.00 (Single User License)

ID: S18D2B2535B8EN

## **Abstracts**

The South & Central America Advanced Distributed Management System (ADMS) market is poised for significant growth, with projections indicating a rise from US\$ 118.3 million in 2024 to US\$ 301.8 million by 2031. This growth trajectory reflects a compound annual growth rate (CAGR) of 15.0% from 2025 to 2031, driven by various factors including the modernization of energy infrastructure and the increasing integration of renewable energy sources.

In recent developments, Atlas Renewable Energy has made strides in the region by inaugurating the 200 MW/800 MWh Battery Energy Storage System (BESS) Del Desierto project in Chile's Antofagasta region in May 2025. This project followed a substantial US\$ 510 million financing round aimed at constructing the 215 MW solar and 418 MW/1,672 MWh BESS Estepa site. Such initiatives highlight the urgent need for advanced grid technologies as many countries in South and Central America face challenges related to aging electrical infrastructure and frequent power outages. ADMS plays a crucial role in enhancing grid resilience through predictive maintenance and automated response capabilities, which are essential for minimizing downtime and improving overall reliability.

The increasing frequency of climate-related disruptions, such as storms and floods, further emphasizes the necessity for modernized energy systems. Supportive regulatory frameworks and financial backing from international development banks are helping to

mitigate the high capital costs associated with ADMS implementation, making these advanced technologies more accessible to regional utilities. This accessibility is a key driver of growth in the ADMS market.

The market segmentation reveals that by component, the ADMS market is divided into Solutions and Services, with Solutions holding the largest market share in 2024. In terms of grid type, the market is categorized into Medium Voltage Grid, High Voltage Grid, and Low Voltage Grid, where the Medium Voltage Grid also held the largest share in 2024. Furthermore, by vertical, the market is segmented into Utilities, Industrial, and Commercial, with Utilities dominating the market share in 2024.

The ongoing shift towards grid modernization and digitalization is a significant factor propelling the demand for ADMS. As energy networks transition from traditional, centralized infrastructures to more dynamic and decentralized models, utilities are increasingly in need of real-time data management, predictive analytics, and automated control systems. ADMS platforms are designed to meet these requirements, enabling utilities to manage complex and interconnected grid environments with improved operational efficiency and reliability.

The integration of renewable energy sources, electric vehicles, and smart metering infrastructure further underscores the need for modernized grid systems. ADMS solutions facilitate this transition by optimizing power distribution, enhancing fault detection, and expediting outage restoration, which ultimately reduces operational costs and downtime.

The analysis from J.P. Morgan Private Bank highlights the significant investment opportunities in the region's energy infrastructure, estimating that electricity demand in South and Central America will grow at approximately 3.9% annually through 2030. This growth, coupled with the challenges posed by aging transmission and distribution infrastructure, creates a pressing need for smarter grid solutions capable of managing variable generation and complex energy flows. The report also notes that Latin America requires over US\$ 577 billion in investments by 2030 for generation, transmission, and distribution, indicating substantial opportunities for ADMS technologies.

Country-wise, Brazil is leading the ADMS market in South and Central America, actively implementing smart grid technologies. Notable projects include the replacement of conventional meters with smart meters and the development of microgrids to enhance energy efficiency and reliability. A significant milestone was achieved in November 2024 when Brazil's largest microgrid commenced operations at the State University of Campinas (Unicamp). This project, known as CampusGrid, features a 565 kW solar photovoltaic system integrated with a 1 MW high-capacity BESS, providing energy autonomy for up to two hours. The initiative, valued at BRL 45.3 million (approximately US\$ 7.7 million), was developed in collaboration with CPFL Energia and represents a strategic partnership among several leading institutions.

Key players in the South & Central America ADMS market include Oracle Corp, Schneider Electric SE, General Electric Co, Siemens AG, Capgemini SE, Aspen Technology Inc. (Emerson Electric), Operation Technology Inc., Survalent Technology Corporation, Hitachi Energy Ltd, and Minsait ACS Inc. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to their customers.

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