

South & Central America E-Invoicing Market Forecast to 2031 - Regional Analysis- by Deployment (Cloud-Based and On-Premise), End User (Retail and E-Commerce, Government, IT and Telecom, BFSI, and Others), Application (B2B, B2C, and B2G), and Type (Non-PO Invoices and PO Invoices)

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Abstracts

The South & Central America e-invoicing market was valued at US\$ 2,527.29 million in 2023 and is expected to reach US\$ 10,272.94 million by 2031; it is estimated to record a CAGR of 19.2% from 2023 to 2031.

Rise in Demand for Cloud-Based Solutions Fuels South & Central America E-Invoicing Market

Cloud computing is becoming the driving force for digital transformation across industries. The demand for cloud-based solutions across businesses is growing at an unprecedented rate owing to the advantages offered by these solutions over on-premises deployment. Major advantages of cloud-based solutions include easy deployment, interoperability, cost savings, high efficiency, and on-demand features. Services such as Infrastructure as a Service (IaaS) and Software as a Service (SaaS) are growing rapidly. However, the adoption of cloud-based solutions varies across geographies and businesses depending on multiple factors such as regulatory environment and competitive scenarios. The demand for cloud-based solutions is high in small and medium enterprises owing to the cost benefits related to these solutions. Most large organizations are still using on-premises solutions as implementing new processes across large organizations and their networks is a complex task and requires changes in traditional work practices. However, with the increasing capabilities and

benefits of cloud-based solutions in terms of technology integrations such as the Internet of Things (IoT), artificial intelligence (AI), blockchain, big data, and predictive analytics, the demand for these solutions is expected to grow at an impressive rate over the forecast period of 2024 to 2031. In addition to this, the large and fast-growing number of small and medium-sized enterprises (SMEs) across the world is projected to fuel the demand for cloud-based e-invoicing solutions. The growing popularity of cloud-based e-invoicing solutions and their benefits are expected to fuel their deployments at an impressive pace, especially among SMEs. Hence, the rising demand for cloud-based solutions is anticipated to offer ample growth opportunities for e-invoicing solution providers over the forecast period

South & Central America E-Invoicing Market Overview

The e-invoicing market in South America (SAM) is segmented into Brazil, Argentina, and the Rest of SAM. The Rest of SAM countries include Chile, Colombia, Guatemala, and Peru. SAM is one of the most advanced regions in terms of adoption and implementation of e-invoicing. E-invoicing has become prevalent in SAM countries to improve overall fiscal control and reduce high tax evasion rates. In countries such as Brazil, Chile, and Guatemala, e-invoicing is used for almost all economic and business transactions. The high adoption of e-invoicing in this region is a result of favorable legislation and government willingness to promote efficient invoicing solutions to plug loopholes that result in tax evasion by big taxpayers. The national and state tax authorities are increasingly using consolidated models coupled with technology integration and favorable legislation to enhance their fiscal models. These models are being increasingly adopted in countries such as Colombia and Costa Rica. In addition, the advantages, such as reduced costs, improved business management, prevention of tax fraud/evasion, and efficient monitoring of financial transactions, offered by e-invoicing drive its adoption in B2B, B2C, and B2G transactions in various SAM countries. Hence, the growth of the e-invoicing market in SAM is driven by public sector initiatives. For example, in August 2022, in Colombia, Dirección de Impuestos y Aduanas Nacionales (DIAN) published a Resolution extending the implementation deadline for electronic sales invoices and electronic equivalent documents by three months. This extension granted taxpayers more time to adapt to new obligations.

South & Central America E-Invoicing Market Revenue and Forecast to 2031 (US\$ Million)

South & Central America E-Invoicing Market Segmentation

The South & Central America e-invoicing market is categorized into deployment, end user, application, type, and country.

Based on deployment, the South & Central America e-invoicing market is bifurcated into on-premise and cloud-based. The cloud-based segment held a larger market share in 2023.

In terms of end user, the South & Central America e-invoicing market is categorized into retail and e-commerce, government, IT and Telecom, BFSI, and others. The government segment held the largest market share in 2023.

In terms of application, the South & Central America e-invoicing market is categorized into B2B, B2C, and B2G. The B2B segment held the largest market share in 2023.

In terms of type, the South & Central America e-invoicing market is bifurcated into non-PO invoices and Po invoices. The non-PO invoices segment held a larger market share in 2023.

By country, the South & Central America e-invoicing market is segmented into the Brazil, Argentina, and the rest of South & Central America. Brazil dominated the South & Central America e-invoicing market share in 2023.

Sage Group Plc, Comarch SA, Nipendo Ltd, Basware Corporation, Coupa Software Inc, International Business Machines Corp, and SAP SE are some of the leading companies operating in the South & Central America e-invoicing market.

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