

South & Central America Emission Monitoring Systems Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America Emission Monitoring Systems Market is projected to grow from US\$ 117.9 Million in 2023 to US\$ 168.7 Million by 2031, reflecting a compound annual growth rate (CAGR) of 4.6% during this period.

Executive Summary and Market Analysis

Brazil has enacted regulations aimed at reducing greenhouse gas emissions across various sectors, including agriculture, energy, and automotive. The government is actively ensuring compliance with these regulations, underscoring the need for precise emissions tracking. For instance, the Brazilian National Policy on Climate Change (PNMC) has established ambitious emission reduction targets, necessitating companies to monitor their emissions to avoid penalties. The installation of Continuous Emission Monitoring Systems (CEMS) is crucial for industries to adhere to these regulations.

Brazil's commitment to international climate agreements, such as the Paris Agreement, further emphasizes the need for robust emission monitoring systems to meet established reduction goals. As Brazil aims to lead in climate action, reliable monitoring is essential for tracking progress and ensuring transparency in emission reductions.

Strategic Insights

Market Segmentation Analysis

By Functionality: The market is divided into Continuous Emission Monitoring Systems (CEMS) and Portable Emission Monitoring Systems (PEMS), with CEMS holding the largest market share in 2023.

By Technology: The market includes Catalytic Bead, Infrared Sensor Technology, Electrochemical Sensor, Photoionization Detectors (PID), and others, with Electrochemical Sensors leading in market share in 2023.

By Type: The market is categorized into Methane Gas Detectors, CO2 Gas Detectors, Oxygen Gas Detectors, and others, where CO2 Gas Detectors dominate the market.

By End User: Segments include Marine Vessels, Oil and Gas, Chemicals, Automotive, Power Generation, and others, with Oil and Gas being the largest segment in 2023.

Market Outlook

The rise of smart cities, driven by urbanization, is enhancing operational efficiency and improving government services and citizen welfare through technology. Smart cities leverage advanced technologies to manage environmental emissions, reduce air pollution, and optimize utility infrastructure. The adoption of emission monitoring systems is crucial for these initiatives, as they support the transition to more efficient urban environments.

The Inter-American Development Bank (IDB) anticipates around USD 120 billion in investments for smart urban infrastructure by 2030. Projects like Brazil's Smart City São Paulo, with a focus on urban mobility and air quality monitoring, and similar initiatives in Colombia and Chile, are expected to drive demand for advanced emission monitoring systems.

Country Insights

The South & Central America Emission Monitoring Systems Market is primarily segmented into Brazil, Argentina, and the Rest of South & Central America, with Brazil holding the largest market share in 2023. The growth of the emission monitoring systems market in Brazil is fueled by increased investments in industrial sectors such as chemicals, pharmaceuticals, and petrochemicals, which saw a 2.3% rise in 2023, reaching US\$ 4.58 billion.

Brazil's significant offshore oil production, averaging 3.02 million barrels per day, and its

natural gas production of 138 million cubic meters per day, both show growth and contribute to the demand for emission monitoring systems. The Brazilian National Agency of Petroleum, Natural Gas, and Biofuels projects US\$ 4.3 billion in investments for oil and gas exploration from 2023 to 2027.

Company Profiles

Key players in the market include ABB Ltd, Emerson Electric Co, Siemens AG, SLB, Ametek Inc, Danfoss AS, Sensirion Holding AG, Horiba Ltd, Protea Ltd, Green Instruments A/S, NevadaNano, Aeris Technologies, Qube Technologies, Emsys Maritime Ltd, Green Sea Guard, and OPSIS AB. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions.

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