

South & Central America Geographic Information System Market Report (2021-2031) by Scope, Segmentation, Dynamics, and Competitive Analysis

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Abstracts

The South & Central America geographic information system (GIS) market is projected to grow from US\$ 441.69 million in 2023 to US\$ 634.79 million by 2031, reflecting a compound annual growth rate (CAGR) of 4.6% during this period.

Executive Summary and Market Analysis

The GIS market in South & Central America is primarily segmented into Brazil, Argentina, and the Rest of SAM. The region has seen substantial growth in its industrial and infrastructure sectors, driven by increased construction and development of commercial buildings. Governments are actively promoting these developments; for example, Chile's National Construction Association has backed a US\$ 26 billion initiative to revitalize the construction industry, which includes significant investments in infrastructure and housing.

In the energy sector, South America's total energy supply reached approximately 26.9 million terajoules in 2021. Industries such as oil and gas, which often operate in challenging environments like offshore rigs and remote mining sites, require robust GIS solutions for effective data management and communication. GIS technology is essential for tracking assets like pipelines and storage facilities, optimizing maintenance schedules, and enhancing operational safety and efficiency. Thus, the growth in construction and energy sectors is a key driver for the GIS market in the region.

Market Segmentation Analysis

The South & Central America GIS market is categorized by component, function, and end user.

By Component: The market is divided into hardware, software, and services, with software holding the largest market share in 2023. The hardware segment includes GIS collectors, imaging sensors, LIDAR, total stations, and GNSS/GPS antennas. The software segment encompasses desktop GIS, server GIS, developer GIS, mobile GIS, and remote sensing software.

By Function: The market is segmented into mapping, surveying, telematics and navigation, and location-based services, with mapping being the largest segment in 2023.

By End User: The end-user categories include agriculture, oil and gas, construction, mining, transportation, energy and power, among others, with transportation leading the market share in 2023.

Market Outlook

Key players in the GIS market are increasingly integrating artificial intelligence (AI), generative AI (Gen AI), and augmented reality technologies to enhance spatial data visualization and analysis. For instance, Deloitte recently launched a geospatial platform that incorporates AI for scenario planning and monitoring, utilizing Google Earth and Vertex AI technologies to help clients address climate change impacts.

In 2023, many IT companies are adopting Gen AI to improve productivity and efficiency. Gen AI-based GIS solutions offer advantages such as location intelligence, asset mapping, and demographic targeting, indicating a trend towards innovative GIS applications in the near future.

Country Insights

The GIS market in South & Central America includes Brazil, Argentina, and other countries, with Brazil holding the largest market share in 2023. Brazil's construction industry is thriving, fueled by rapid industrialization and a surge in residential and

commercial projects. Notable housing developments initiated in 2021 include several multi-family complexes, which are expected to create numerous investment opportunities.

Additionally, Brazil is a leader in wind power, with a capacity of 15.5 gigawatts in 2022, contributing to the region's renewable energy output. By 2025, Brazil is projected to account for 69% of Latin America's total wind capacity, further driving the demand for GIS solutions in energy management.

Company Profiles

Key players in the South & Central America GIS market include Autodesk Inc, Topcon Corp, Caliper Corp, SuperMap Software Co Ltd, Hi-Target, Precisely, Maxar Technologies Inc, Trimble Inc, AmigoCloud Inc, Bentley Systems Inc, Hexagon AB, Cadcorp Limited, Spatialworks Sdn Bhd, Environmental Systems Research Institute, Inc., Blue Marble Geographics, TomTom International B.V., FARO Technologies Inc, L3Harris Technologies Inc, Basarsoft Bilgi Teknolojileri A.S., and Carto. These companies are pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer cutting-edge solutions to customers.

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