

South & Central America Process Instrumentation Market Size and Forecast (2021 - 2031)

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Abstracts

The South & Central America Process Instrumentation Market is projected to grow significantly, reaching an estimated US\$ 762.9 million by 2031, up from US\$ 647.1 million in 2024. This growth represents a compound annual growth rate (CAGR) of 2.6% from 2025 to 2031, indicating a steady increase in demand for process instrumentation in the region.

Executive Summary and Market Analysis

The South & Central America region is primarily divided into three segments: Brazil, Argentina, and the Rest of South America (SAM). A notable trend in the region is the increasing government investment in digitalization initiatives. For instance, in September 2024, the Brazilian Development Bank (BNDES) and the National Bank for Economic and Social Development (Finep) launched a program aimed at the digital transformation of micro, small, and medium-sized industrial enterprises. This initiative, part of the Brasil Mais Produtivo program, involves an initial investment of approximately US\$ 27 million (BRL 160 million) for smart factory development, with an additional US\$ 69 million (BRL 400 million) allocated for digitalization plans, totaling around US\$ 96 million (BRL 560 million).

Moreover, in September 2022, the Mechanical Engineering Department at the Universidad de Chile received 1.7 billion Chilean pesos from CORFO's "Strategic Technology Program: Driving Advanced Manufacturing using the Technological Revolution." These investments in digital transformation and advanced manufacturing are driving industries to adopt smart, automated systems that rely heavily on precise process instrumentation. Such technologies facilitate real-time data collection, remote monitoring, and predictive maintenance, which enhance operational efficiency and

minimize downtime. Consequently, there is a rising demand for advanced instrumentation solutions across various sectors, including chemicals and food processing.

Strategic Insights

Market Segmentation Analysis

The South & Central America Process Instrumentation Market can be segmented by technology, application, and specific instruments:

By Technology: The market is categorized into Flow Meters, Pressure and Temperature Sensors, Analytical Instruments, and Level Meters. In 2024, Flow Meters held the largest market share.

By Flow Meter: This segment includes Mass Flow, Electromagnetic Flow (EMF), Vortex, Ultrasonic, and others, with Ultrasonic Flow Meters leading the market in 2024.

By Level Meter: The Level Meter segment is divided into High Frequency Radar, Time Domain Reflectometry (TDR), and others, with TDR holding the largest share in 2024.

By Application: The market is segmented into Oil and Gas, Energy and Power, Water and Wastewater, Food and Beverage, Marine, Petrochemical, Chemical, and others, with the Chemical sector dominating in 2024.

Market Outlook

The pharmaceutical and chemical industries have stringent requirements for quality control and precise monitoring, which are essential functions provided by process instrumentation. As these sectors expand to meet the growing demand for medicines, chemicals, and specialty products, the need for precise, efficient, and automated control systems becomes increasingly critical. Process instrumentation, including sensors, analyzers, and control systems, plays a vital role in ensuring product quality, optimizing production processes, and adhering to strict regulatory standards.

In Brazil, the Presiq chemical sustainability program has received US\$ 2.79 billion in

incentives over five years from the lower house of Congress to modernize and enhance the competitiveness of the chemical sector. This initiative aims to reduce import dependence and promote sustainable production. By October 2025, Presiq was operating under an industrial model linked to product types and an investment model targeting the expansion of petrochemical production capacity, including new natural gas-based fertilizer plants. Such programs encourage research and development and the modernization of existing facilities, thereby increasing the demand for advanced process instrumentation like sensors, analyzers, control systems, and automation equipment. These advancements are crucial for accurate monitoring, efficiency optimization, and compliance with safety and environmental standards.

Country Insights

The South & Central America Process Instrumentation Market is further segmented by country, with Brazil, Argentina, and the Rest of South America being the key players. Brazil accounted for the largest market share in 2024.

In January 2024, Brazil introduced a new industrial policy known as Nova Indústria Brasil (NIB), aimed at enhancing the country's industrial development through sustainability, innovation, and technological advancement. This policy includes approximately US\$ 60 billion (BRL 300 billion) in financing by 2026, with goals to improve industrial capacity, boost exports, and promote eco-friendly technologies. This shift towards industrial innovation and technological progress is expected to significantly impact Brazil's process instrumentation market as industries increasingly adopt advanced automation, digitalization, and sustainable practices.

Additionally, new plants are being established in Brazil. For example, in January 2025, CROMOGENIA UNITS announced the opening of a new chemical specialties plant in Paraná, in collaboration with AMINOLEATHER INDUSTRIA E COMERCIO LTDA. Furthermore, in October 2023, a consortium including Buhler, Cargill, Givaudan, and the Institute of Food Technology (Ital) launched the Tropical Food Innovation Lab, an innovation ecosystem focused on developing sustainable food and beverages that promote Brazilian biodiversity.

Company Profiles

Key players in the South & Central America Process Instrumentation Market include ABB Ltd, Schneider Electric SE, Emerson Electric Co, Honeywell International Inc, Siemens AG, Yokogawa Electric Corp, Fuji Electric Co Ltd, ENDRESS + HAUSER

GROUP SERVICES AG, Metso Outotec Corp, and Brooks Instrument. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to deliver innovative products and enhance their market presence.

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