

South & Central America Smart Meters Market Size and Forecast (2021 - 2031)

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Abstracts

The South and Central America smart meters market is projected to grow significantly, reaching an estimated US\$ 1,140.6 million by 2031, up from US\$ 887.8 million in 2024. This growth represents a compound annual growth rate (CAGR) of 3.7% from 2025 to 2031, indicating a steady increase in the adoption of smart metering technologies across the region.

Executive Summary and Market Analysis

The smart meter market in South and Central America is divided into key regions, namely Argentina, Brazil, and the Rest of South and Central America. The adoption of smart meters varies widely among these countries, with Brazil leading the charge due to supportive government policies, regulatory frameworks, and utility-driven pilot programs aimed at modernizing the grid and minimizing non-technical losses. Other countries, such as Colombia, Chile, and Argentina, are also making strides in smart metering, particularly in urban areas. Chile has taken significant steps by establishing regulatory mandates for smart meter deployment, while Argentina is ramping up its efforts as of February 2024. The Argentine power regulator, ENRE, has initiated a public-private working group to expedite the rollout of smart meters in the service areas of major distribution companies like Edenor and Edesur in Buenos Aires.

Strategic Insights

Market Segmentation Analysis

The South and Central America smart meters market can be categorized based on type, technology, and end user:

By Type: The market is segmented into Smart Electric Meters, Smart Water Meters, and Smart Gas Meters. In 2024, the Smart Electric Meter segment was the largest contributor to the market.

By Technology: The market is divided into Advanced Metering Infrastructure (AMI) and Automated Meter Reading (AMR). The AMI segment dominated the market in 2024, reflecting a trend towards more sophisticated metering solutions.

By End User: The market is segmented into Residential, Commercial, and Industrial users, with the Residential segment leading in market share in 2024.

Market Outlook

Water utilities in South and Central America, primarily consisting of domestic providers, are tasked with delivering safe and efficient water services within a highly regulated framework. These utilities often face budget constraints that hinder their ability to make significant capital investments. The challenges they encounter are exacerbated by rising operational costs, aging infrastructure, and financial limitations, particularly in managing water consumption and distribution.

A pressing issue in the sector is non-revenue water (NRW), which refers to the discrepancy between the volume of water supplied and the volume that is billed to customers. NRW losses arise from various factors, including outdated mechanical meters, manual reading processes, and unmetered or unauthorized consumption. Common causes of water loss include pipeline leaks, theft, overflows from storage tanks, unauthorized access, and free water allocations.

Globally, NRW accounts for approximately 30-35% of all water intended for consumption, leading to increased operational costs due to higher energy usage and maintenance needs. The World Bank estimates that NRW results in around US\$ 14 billion in annual losses worldwide, with a significant portion occurring in developing countries. This scenario presents a substantial growth opportunity for the smart meter market, as these technologies can enhance operational efficiency, improve revenue through accurate billing, better manage demand, and foster innovation through digital infrastructure.

Country Insights

The South and Central America smart meters market is further segmented by country, with Brazil, Argentina, and the Rest of South and Central America being the primary regions. Brazil is currently the largest market player as of 2024.

Brazil is actively promoting the adoption of smart meters through a comprehensive strategy aimed at modernizing its energy infrastructure, enhancing grid efficiency, and addressing electricity theft. The Brazilian Electricity Regulatory Agency (ANEEL) has played a crucial role in establishing regulations that set minimum standards for smart metering equipment, including features like remote management and time-of-use billing. Various pilot projects have been initiated across states such as Rio de Janeiro and S?o Paulo to standardize deployment methods and technology integration. In November 2023, Epec, the electric power company in Argentina's C?rdoba province, accelerated its data collection efforts by installing over 270,000 smart meters, serving more than 1 million customers.

Company Profiles

Key players in the South and Central America smart meters market include Schneider Electric SE, Honeywell International Inc., Siemens AG, Hubbell Inc., Itron Inc., Landis+Gyr Group AG, Sagemcom UK Ltd., Xylem Inc., BOVE Technology, and ZENNER International GmbH & Co. KG. These companies are pursuing various strategies such as market expansion, product innovation, and mergers and acquisitions to enhance their offerings and increase their market share in the growing smart meter sector.

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