

# **South & Central America Thermal Imaging Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Product Type (Modules, Cameras, and Scopes), Application (LWIR, MWIR, and SWIR), Type (Handheld and Standstill), Technology (Cooled and Uncooled), and End-Use Industry (Automotive, Consumer, Industrial, Medical, Defense and Aerospace, and Others)**

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## **Abstracts**

The South & Central America Thermal Imaging Market is projected to grow significantly, reaching an estimated US\$ 133.4 million by 2031, up from US\$ 98.7 million in 2024. This growth represents a compound annual growth rate (CAGR) of 4.4% from 2024 to 2031, driven by increasing industrial applications and technological advancements in thermal imaging.

## **Executive Summary and Market Analysis**

In South & Central America, countries like Brazil and Argentina are witnessing a surge in their industrial sectors, leading to a higher adoption of thermal imaging technologies. These technologies are being utilized for various applications, including predictive maintenance, energy efficiency, and firefighting. In Brazil, for instance, the oil and gas industry is leveraging thermal cameras for pipeline inspections and refinery monitoring. A notable development occurred in August 2024 when TGS announced the establishment of new centers at Petrobras' Rio de Janeiro offices. These centers focus on ocean bottom nodes (OBNs) and 4D imaging to enhance reservoir monitoring and

exploration in Brazil's offshore sector. TGS's advanced 4D Full Waveform Inversion (FWI) technology aims to provide high-resolution subsurface data, which will assist Petrobras in refining its exploration strategies and optimizing production. This trend reflects the growing demand for thermal imaging solutions in the region, as industries seek innovative technologies to enhance exploration and resource management.

The market is also benefiting from heightened concerns regarding environmental monitoring and the need for advanced surveillance systems in urban areas. As industries increasingly recognize the value of thermal imaging, the market is expected to expand further.

## **Market Segmentation Analysis**

The South & Central America Thermal Imaging Market can be segmented based on various criteria:

**By Product Type:** The market is divided into Modules, Cameras, and Scopes, with Cameras holding the largest market share in 2024.

**By Application:** The segmentation includes LWIR (Long-Wave Infrared), MWIR (Mid-Wave Infrared), and SWIR (Short-Wave Infrared), where LWIR is the leading segment.

**By Type:** The market is categorized into Handheld and Standstill types, with Handheld devices dominating the market.

**By Technology:** The segmentation includes Cooled and Uncooled technologies, with Cooled technology leading in market share.

**By End Use Industry:** The market is segmented into Automotive, Consumer, Industrial, Medical, Defense and Aerospace, and Others, with the Industrial sector holding the largest share in 2024.

## **Market Outlook**

The integration of artificial intelligence (AI) into thermal imaging technologies is expected to significantly enhance their performance across various applications,

including defense, environmental monitoring, and healthcare. AI's capabilities in machine learning and data processing can improve the accuracy and effectiveness of thermal imaging systems. These systems generate vast amounts of data, and AI algorithms can analyze hidden patterns more efficiently than traditional methods. For instance, AI can autonomously identify anomalies or potential threats in the data, which is particularly beneficial in defense applications.

In January 2024, Hanwha Vision launched a new line of AI-powered radiometric thermal cameras, which combine advanced imaging with temperature detection capabilities. These innovations are set to provide unparalleled solutions for industries such as power generation, manufacturing, and oil and gas. The integration of AI into thermal imaging technology is anticipated to create substantial growth opportunities for the market during the forecast period.

## Country Insights

The South & Central America Thermal Imaging Market is primarily segmented by country, with Brazil, Argentina, and the Rest of South & Central America being the key regions. Brazil is expected to maintain the largest market share in 2024. The adoption of thermal imaging technologies in Brazil is on the rise, driven by both military and commercial sectors aiming to enhance surveillance, security, and operational efficiency. A significant development occurred in April 2023 when the Brazilian Army completed trials with the domestically developed Olhar optronic system, a thermal imaging solution created in collaboration with OPTO Space and Defense. This initiative underscores Brazil's commitment to advancing its defense capabilities through innovative thermal imaging technologies.

## Competitive Landscape

Key players in the Thermal Imaging Market include Fluke Corp, L3Harris Technologies Inc, Safran SA, Teledyne FLIR LLC, Testo SE & Co. KGaA, Leonardo S.p.A., UNI-TREND TECHNOLOGY (CHINA) CO., LTD., Hangzhou Microimage Software Co., Ltd., SDT International SA/NV, and Megger Group Limited. These companies are actively pursuing strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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