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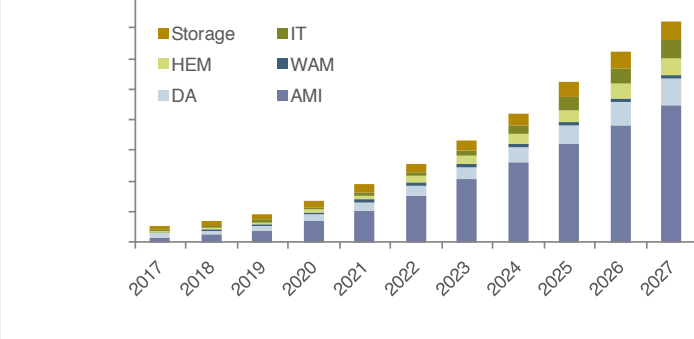
Central America & Caribbean Smart Grid: Market Forecast (2017 – 2027)

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Central America & Caribbean Smart Grid: Market Forecast (2017-2027)

The Central America and Caribbean region offers unique near-term opportunities for smart grid infrastructure investment. The region has several strong positive market drivers. Most notably, Central America and the Caribbean averages nearly 20% total T&D losses, primarily due to electricity theft. This has created challenging financial conditions for utilities and is spurring a number of

Figure 3.4: Central America and Caribbean smart grid forecast by segment (cumulative)

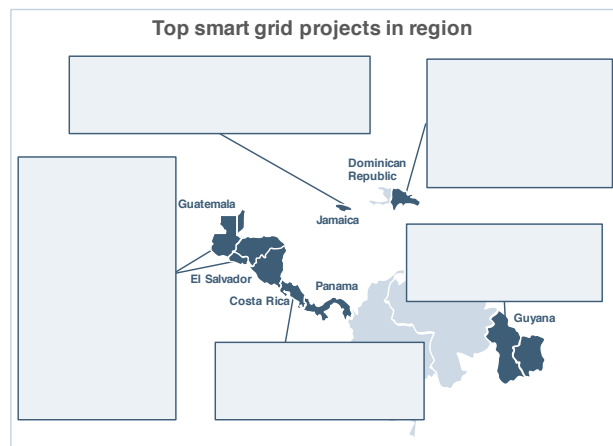


smart metering efforts, many of which are already underway. At the same time, overall high crime rates – particularly violent crime – make it difficult for utilities to secure permanent loss reductions and make deployments more challenging. Non-technical loss reduction efforts are expected to drive near-term AMI deployments. In addition, Central American and Caribbean countries will deploy smart grid infrastructure to incorporate renewable energy and employ demand response programs. These will help reduce electricity prices that average over 17 cents per kWh. At the same time, countries in the region on average consume just over 1,000 kWh per person per year—less than half the emerging market average. This diminishes the overall savings potential of smart grid deployments and demand response programs.

On balance, the case for smart grid infrastructure in the region is strong. With firm economic and geographic ties to the US market, Central America’s smart grid market is poised to accelerate over the next decade.

Key questions answered in this study:

- How large will the smart grid market be across Central America and the Caribbean over the next decade?
- What segments of the smart grid market are poised to grow over the next decade?
- Who are the most active international vendors in the Central American and Caribbean market?



Research Deliverables: 83-page PDF study + Excel dataset

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