



MRS26-258 · Smart Building Technologies

# Energy Submetering Hardware

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

## WHY THIS REPORT

Energy submetering hardware measures electricity, water and gas at circuit, tenant and equipment level to enable billing, energy management and cost allocation in buildings. This decision-grade study sizes the global market three ways — value, unit volume and metering points — across meter type, connectivity and application, across seven regions and four scenarios to 2032, with outlooks to 2050.

## SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond billing, submetering delivers measurable consumption visibility, verified efficiency and ESG reporting, while meter circularity strengthens the resource-security story.

### Mapped Sustainable Development Goals:

<b>SDG 7</b> Affordable & Clean Energy	<b>SDG 12</b> Responsible Consumption	<b>SDG 11</b> Sustainable Cities	<b>SDG 9</b> Industry & Innovation	<b>SDG 13</b> Climate Action
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### Measurable sustainability outcomes assessed:

- Granular consumption visibility at circuit and tenant level
- Verified efficiency savings and accurate cost allocation
- Auditable energy and ESG reporting
- Meter embodied carbon, end-of-life and data security as material risks

**Framework alignment:** Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

## WHAT'S INSIDE AT A GLANCE

<b>53</b> Chapters	<b>9</b> Report Parts	<b>7</b> Regions Covered	<b>40+</b> Country Markets
<b>2025–32</b> Forecast Horizon	<b>4</b> Forward Scenarios	<b>25+</b> Companies Profiled	<b>5</b> SDGs Mapped



## MARKET OVERVIEW

### From billing hardware to the data foundation of building energy management — where granular visibility drives savings.

The energy submetering hardware market is read three ways — value, volume and metering points — and forecast under four scenarios, each region reported separately. Demand is propelled by the drivers below, supported by maturing incentives across Europe, North America and Asia Pacific.

- North America is profiled first — United States, Canada — large commercial stock, retrofit demand, ESG reporting
- Europe policy leader — Germany, United Kingdom, France, Nordics — energy codes, CSRD, healthy-building rules
- Segmentation reads the value across the report’s structure, technology and application axes
- Resource-and-outcome economics is the differentiator — increasingly with service and data revenue

## REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Markets & Drivers
North America	Adoption leader	United States, Canada — large commercial stock, retrofit demand, ESG reporting
Europe	Policy leader	Germany, United Kingdom, France, Nordics — energy codes, CSRD, healthy-building rules
Asia Pacific	Scale engine	China, Japan, India, Australia, Singapore — smart new-build, urbanisation, manufacturing
Latin America	Emerging	Brazil, Mexico — commercial modernisation, energy-cost drivers
Middle East	High-growth	UAE, Saudi Arabia — smart-city programmes, green-building mandates
Africa	Frontier	South Africa, Kenya — commercial estates, efficiency retrofit

## KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
<ul style="list-style-type: none"> <li>• Tenant-billing &amp; cost-allocation needs</li> <li>• Energy-management &amp; efficiency targets</li> <li>• ESG &amp; consumption reporting</li> <li>• Data-center &amp; multi-tenant growth</li> <li>• Connected-meter &amp; sensor technology gains</li> </ul>	<ul style="list-style-type: none"> <li>• Installation &amp; retrofit cost</li> <li>• Metering-accuracy &amp; standards compliance</li> <li>• Integration with BMS &amp; billing systems</li> <li>• Meter &amp; CT cost variability</li> <li>• Data-management &amp; cybersecurity burden</li> </ul>



## SEGMENTATION SNAPSHOT

<b>By Type</b>	Electrical submeter · branch-circuit monitor · water/gas submeter
<b>By Connectivity</b>	Wired · wireless
<b>By Component</b>	Meters · CTs · electronics · connectivity · software
<b>By Application</b>	Tenant billing · energy management · cost allocation
<b>By End User</b>	Commercial · multi-tenant · industrial · data centers
<b>By Business Model</b>	Hardware sale · SaaS · metering-as-a-service

## TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

### Part I — Report Foundation, Discovery and Strategic Intelligence

- › Chapter 1. Scope, Methodology and Report Architecture
- › Chapter 2. Industry Discovery Summary — Energy Submetering Hardware
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

### Part II — Market Intelligence, Sizing, Forecasting and Segmentation

- › Chapter 5. Industry Overview and Market Evolution
- › Chapter 6. Market Dynamics
- › Chapter 7. Global Market Size and Forecast, 2020–2032
- › Chapter 8. Market Segmentation Analysis
- › Chapter 9. End-User and Demand-Side Intelligence
- › Chapter 10. Pricing, Cost and Commercial Model Intelligence

### Part III — Regional and Country Intelligence

- › Chapter 11. Global Regional Intelligence Framework
- › Chapter 12. North America Market Intelligence
- › Chapter 13. Europe Market Intelligence
- › Chapter 14. Asia Pacific Market Intelligence
- › Chapter 15. Latin America Market Intelligence
- › Chapter 16. Africa Market Intelligence
- › Chapter 17. Middle East Market Intelligence
- › Chapter 18. Rest of World Market Intelligence

### Part IV — Technology, Innovation and Category-Specific Intelligence

- › Chapter 19. Technology Landscape and Architecture
- › Chapter 20. Emerging and Next-Generation Technology Intelligence
- › Chapter 21. Category-Specific Intelligence Module
- › Chapter 22. Research, Innovation and Funding Landscape



## Part V — Company, Competition, Patent and Project Intelligence

- › Chapter 23. Competitive Landscape
- › Chapter 24. Company Profiles
- › Chapter 25. Mergers, Acquisitions, Partnerships and Ecosystem Intelligence
- › Chapter 26. Patent Landscape and Intellectual Property Intelligence
- › Chapter 27. Project, Deployment and Case-Study Intelligence

## Part VI — Sustainability, ESG, SDG, Climate and Natural-Capital Intelligence

- › Chapter 28. Sustainability Intelligence Suite
- › Chapter 29. ESG Intelligence and Double Materiality
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- › Chapter 31. SDG Intelligence
- › Chapter 32. Carbon, Net-Zero and Climate-Mitigation Intelligence
- › Chapter 33. Water, Biodiversity and Natural-Capital Intelligence
- › Chapter 34. Circular Economy and Resource-Security Intelligence
- › Chapter 35. Social Impact, Human Capital and Community Intelligence
- › Chapter 36. Climate Risk, Adaptation and Resilience Intelligence

## Part VII — Supply Chain, Policy, Legal, Economics and Finance

- › Chapter 37. Value Chain, Supply Chain and Geopolitical Intelligence
- › Chapter 38. Policy, Regulation and Incentive Intelligence
- › Chapter 39. Legal, Contracting and Risk-Allocation Intelligence
- › Chapter 40. Unit Economics, CAPEX, OPEX and Return Analysis
- › Chapter 41. Investment, Sustainable Finance and Bankability Intelligence

## Part VIII — Scenario, Future Intelligence and Final Due Diligence Verdict

- › Chapter 42. Scenario Analysis and Future Intelligence
- › Chapter 43. Sustainability Due Diligence Framework and Data-Room Index
- › Chapter 44. Risk Register, RAG Rating and Anti-Greenwashing Screen
- › Chapter 45. Bottom-Line Verdict and Strategic Recommendations
- › Chapter 46. Implementation Roadmap and Stakeholder Playbooks

## Part IX — Annexes, Directories and Reference Material

- › Chapter 47. Methodology Annex
- › Chapter 48. Corporate Directory and Company Intelligence Annex
- › Chapter 49. Patent Directory and Patent Intelligence Annex
- › Chapter 50. Project Intelligence Annex
- › Chapter 51. Forecast Annex
- › Chapter 52. Sustainability KPI Annex
- › Chapter 53. Reference Annexes

## COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans established building-technology majors, specialist hardware and software vendors, and systems integrators. Deal activity — partnerships, technology licensing and demonstration programmes — signals a market consolidating around bankable, repeatable solutions.

### Representative players profiled in the full report:

Schneider Electric SE · Siemens AG · Eaton Corporation plc · ABB Ltd · Honeywell International Inc. · and 20+ further profiled players across hardware, software and integration.

**Investment intelligence:** venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.



## KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global energy submetering hardware market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do resource-and-outcome economics change returns versus conventional methods?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

## WHY ANMD — THE DIFFERENCE

*Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.*

- › **Triangulated sizing** — every market read three ways so value, volume and area views reconcile rather than conflict.
- › **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear investment verdict.

## WHO SHOULD BUY THIS REPORT

Investors, meter OEMs, integrators, building owners, property managers, ESG teams, lenders, research institutions, policymakers, strategic corporate planners and decision-makers.

## Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com) · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

## Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at [www.anewmarketdynamics.com](http://www.anewmarketdynamics.com). The full detailed table of contents will be sent directly to your registered company email address.