



27 Water Street  
Wakefield, MA 01880

(781) 245-3200  
(781) 224-7552 (fax)

*A STEADY STREAM OF DATA IS COMING YOUR WAY*

## *worldflow energy monitor*



*daniel bernoulli*



*Energy Monitor*, a Worldflow periodical, focuses on oil & gas, refining & petrochemical, and power & renewable industries in relation to flow measurement and other instrumentation. Every quarter the Energy Monitor surveys the energy scene to distill events, trends, and opportunities and deliver them to your desktop.

The Monitor explains and interprets the importance of capital spending forecasts, new drilling and construction, and new regulations that affect instrumentation so that you can make better decisions and target your marketing more effectively.

# *Worldflow Energy Monitor*

## **Overview**

There's no doubt about it. Energy is hot . . . and getting hotter. Higher demand for oil and natural gas, diminishing longterm supplies, and cataclysmic natural disasters are causing the energy industries to change rapidly.

For flowmeter and other instrumentation manufacturers, particularly temperature and pressure, this change offers opportunities. As Jesse Yoder wrote in our premier issue of *Worldflow Energy Monitor* this fall:

“The increased value of oil and natural gas means that the companies will be willing to spend more money measuring oil and natural gas. Increased demand is already resulting in increased drilling activity worldwide. This is generating more demand for flow measurement at well sites, including an increased need for multiphase flow measurement. On the downstream side, higher oil prices are likely to generate demand for more accurate methods of measuring oil that is delivered by truck to homes and offices. The rising price of jet fuel means it is a more valuable commodity that may have to be measured more precisely.

“At the same time, the renewables industry is at the early point of what is likely to be an explosion of interest. Of special interest to flowmeter manufacturers is the development of fuel cells, the production of which requires flow measurement. It is less clear to what extent wind energy generation or the development of solar energy require flow measurement. But it is safe to say that the changes in the energy sector that are occurring represent a substantial opportunity for suppliers of flow, pressure, and temperature measuring equipment.”

Having the right information and intelligence to take advantage of these opportunities is vital. And that is where the *Worldflow Energy Monitor* comes in.

Every quarter we survey the energy scene to discover events, trends, and opportunities, refine them through our perspective as flow market analysts to give you useful and succinct information, and deliver it to your desktop in an easy-to-read format, both printed and electronic.

Knowledge is power, and we invite you to use the information we cull to help you

- Position products and sell to the energy industries
- Target marketing messages
- Bid on opportunities
- Develop products to meet changing needs
- Understand the market and global implications for flow
- Talk to clients knowledgably

## Background on Worldflow

We created the Worldflow periodicals three years ago because we felt our customers needed up-to-the-minute information to supplement our market research reports. At the time we created *Worldflow Barometer*, which focuses on new products, new technologies, and business developments in the flow industry, and *Worldflow User Perspective*, which offers data and insight on user spending and opinions. We also introduced *Worldflow Process Industry Monitor*, which covered energy as well as other flow-related industries. In September 2005 we decided to focus our resources on the volatile energy industries and launched *Worldflow Energy Monitor*.

## Methodology

With the *Energy Monitor* you profit from our on-going industry research and extensive network of flow contacts. Because we research flow every day of the year, we pick up trends, questions, and developments and gain a keen sense of the pulse of the industry. We regularly monitor economic conditions and current events from a flow perspective. Then we draw on our first-hand knowledge of end-users as well as our extensive industry data and experience to digest and analyze this information for you. We provide both electronic and color hard-copy documents so you can enjoy the *Monitor* in the way that suits you best.

## Flash Reports

For hot news items we feel can't wait until the next issue, we email Worldflow Flash Reports to our subscribers with analysis about its significance.

## Scope and Coverage

Each quarter Energy Monitor updates developments in oil & gas exploration, production, and transportation; refining & petrochemical construction and production; and power & renewables, including district heating.

The **Issues & Perspectives** section analyzes the driving forces behind the flowmeter market to give you reports and analyze trends and events affecting the general energy market. Articles in the premier issue included:

- A new era in energy generates new opportunities for flow
- Long-awaited \$14.5m U.S. Energy Bill won't lower prices now, but may help over the next 5 to 10 years

## Worldflow Energy Monitor Table of Contents

### Issues & Perspectives

### Global Spotlight

### Oil & Gas

*In the News*  
*Industry Pulse*  
*New Projects*  
*Company Korner*

### Refining & Petrochemical

*In the News*  
*Industry Pulse*  
*New Projects*  
*Company Korner*

### Power & Renewables

*In the News*  
*Industry Pulse*  
*New Projects*  
*Company Korner*

- Energy Bill – a mixed blessing – focuses on traditional sources

**Global Spotlight** focuses on energy developments in a particular country. The premier issue focused on China, including:

- Voracious China destabilizes world energy market
- China and Japan face off over energy
- Chinese take shortcut to owning household brand names

The specific industry sections – Oil & Gas, Refining & Petrochemical, Power & Renewables – have four segments each.

**In the News** covers recent business and product news for that industry. Articles included:

- Oil & gas, petrochemical industry committed to industrial security progress
- EPCOR acquires TransCanada's interest in TransCanada Power
- New study shows most MTBE cleanup costs already covered
- Duke Energy and Cinergy submit FERC merger application
- Vegetable oil alternative to bio-diesel
- Fuel cell keeps power going during Russian blackout

**Industry Pulse** covers shipment numbers, pricing, regulations, and other trends driving the industry. Articles included:

- Hurricane Katrina pushes oil prices above \$70 a barrel
- API Monthly Statistical Report for July 2005
- Oil & gas profits in line with other industries – and lower
- Wind farms could meet energy needs
- District heating and cooling can reduce fuel consumption
- Cogeneration's time has come

**New Projects** reports on new construction projects worldwide that instrumentation companies could potentially bid on, including these:

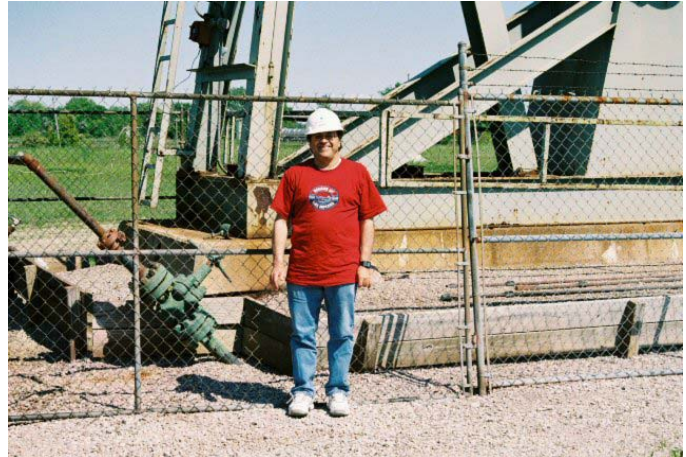
- TransCanada awarded US\$181m Mexican pipeline project
- Egyptian well finds oil
- Greater Gorgon to award contracts
- Patch sets spud date on Bear Canyon oil and gas prospect in Alberta
- Suncor breaks ground on ethanol plant
- GE Energy, Calpine to build power plant in Southern California
- Green energy from trash for Georgia Power customers

**Company Korner** takes an in-depth look at a major company in the industry. The premier issue featured

- Quicksilver Resources: A leader in unconventional gas and Visit to Quicksilver finds flow technology in use
- Wood Group Power keeps energy producers up and running

**About Flow Research, Inc.**

Flow Research Incorporated, founded in 1998 by Jesse Yoder, PhD, is an independent research firm – the only market research company whose primary mission is researching flowmeter markets. We have an established reputation for producing highly accurate, unbiased reports, both custom and off-the-shelf, for our domestic and foreign clientele. Our exhaustive analysis of the world flowmeter market includes more than 5000 pages of data and a worldwide survey of flowmeter users.



*Dr. Jesse Yoder, Flow Research Founder and President, at a customer’s oil well in Michigan*

Dr. Yoder, president, has 18 years of experience as a writer and analyst in process control and instrumentation. Since 1990, he has written 65 market research studies, many of them in the area of flowmeters, valves, and related instrumentation. He has also written more than 60 published articles on flowmeters and related topics in industry journals. Dr. Yoder serves as Contributing Editor to Flow Control magazine.

**Belinda Burum**, vice president and editor, has worked in high tech for 16 years as a technical and marketing writer and manager. Before that she honed her interviewing skills as a newspaper and wire service reporter. In 1990 and 1991 Belinda wrote newsletters and company profiles for Idea Network. She joined Flow Research in 2002. At Flow Research she edits the Worldflow products and has worked on a variety of projects, including end-user surveys and market studies.

**Norman Weeks**, market analyst, spent 24 years in sales, marketing, and technical sales support at Verizon Communications. During this time he introduced new technologies to clients and employees within several training modes. His last assignment at Verizon was as Northeast Region Solutions Manager. Since joining Flow Research, he has worked on a variety of projects, including user surveys, the European energy market, and the API 6A valve market.

# Worldflow Monitoring Service



The *Worldflow Monitoring Service* is a package of resources designed to serve the information needs of flowmeter and instrumentation manufacturers, distributors, and end-users. Each component offers timely data, meaningful news, and insightful commentary on the markets it covers. Each complements and updates the studies that Flow Research regularly conducts in the same markets, and keeps readers informed of events and trends in their industry.

*Worldflow*, which was initiated in 2002, has four components:

## **Market Barometer (MB)** (40–60 pages)

This quarterly publication focuses on the flowmeter industry. *MB* reports on important technology introductions, mergers and acquisitions, and application trends. “State of the Industry” highlights recent industry events and their meaning. And, in every issue, we review each flowmeter technology and interpret changes, giving you the information and ideas you need to implement winning product strategies and to make more informed decisions. Your subscription includes *Flash Reports*, a PDF file of each issue, and two printed and bound hardcopy volumes.

## **Energy Monitor (EM)** (40–70 pages)

This quarterly publication focuses on the oil & gas, refining & petrochemical, and power and renewable industries in relation to flow and temperature measurement, and other instrumentation. Each issue surveys the energy scene to discover significant new events, trends, and opportunities. Every issue is packed with what you need to know. Your subscription includes *Flash Reports*, a PDF file of each issue, and two printed and bound hardcopy volumes.

## **Flash Reports** (2–6 pages each)

Just as the *Worldflow Monitoring Service* informs during the interval between studies, *Flash Reports* activate as soon as important news breaks. *Flash Reports* include both the key facts and a “What it Means” section. Subjects of past *Flash Reports* include Siemens’ purchase of Controlotron, the API’s formulation of standards for vortex flowmeters, and Nu-Flo’s acquisition of Caldon.

## **Living Database (LD)** (24/7 access)

This web-based tool is an instant library of information for anyone who wants to know everything from how to select a flowmeter to what flowmeters are available worldwide and from whom. A centralized database with subscriber access via user name and password, *LD* is the way to conveniently locate information from past reports and articles, and to keep current on new product applications. Better data = better decisions.