

The World Market for Gas Flow Measurement

Now for the first time – comprehensive market research on the worldwide gas flow measurement market. Our Volume XI, **The World Market for Gas Flow Measurement**, is the most complete picture ever presented on gas flow measurement. Its 500+ pages bring you up to speed on all the important aspects of this market.

This new detailed study includes all types of meters used to measure gas flow, including:

Coriolis	Differential Pressure
Ultrasonic	Positive Displacement
Vortex	Turbine
Thermal	Variable Area

For each type of flowmeter used to measure gas flow, this study tells you:

- Market size by geographic region
- Market forecast by geographic region through 2008
- Average selling price
- Market shares by geographic region



- Line sizes shipped
- Applications used (custody transfer, non-custody transfer, process gas, utility, large pipe, other)
- Industries
- Sales channels
- Customer types

If you are involved in the gas flow measurement business, then this study is for you!



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A complete picture in time

Why You Must Have This Study

The World Market for Gas Flow Measurement is essential for marketing and product managers in companies involved in gas flow measurement. It gives you worldwide data on all types of flowmeters used to measure gas flow so you can:

- Stay current with gas flowmeter shipments beginning in 2003
- Grasp how the 8 different gas flow technologies stack up against each other
- Benefit from the knowledge gained from more than 60 supplier interviews
- Learn strategies to help you build your product line
- Assess your company's position with detailed company profiles
- Find out what applications each type of gas flowmeter is used for
- Determine what line sizes are being shipped for each type of flowmeter

Executive Summary

Overview

This study analyzes the world market for all types of flowmeters used to measure gas flow. It includes product analyses, market share and market size data, and provides in-depth segmentation of the market by various product and geographic categories. It also includes detailed market growth projections through 2008 for eight types of flowmeters. Detailed market strategies are provided for suppliers.

The following types of flowmeters are included in this study:

- Coriolis
- Ultrasonic
- Vortex
- Thermal
- Differential Pressure
- Positive Displacement
- Turbine
- Variable Area

Study Objectives

This study analyzes the world market for all flowmeters used to measure gas flow. The study results:

- Provide product analysis for all gas flowmeters
- Provide the market size in US dollars and unit volume for all gas flowmeters worldwide
- Provide market shares of the leading suppliers of all gas flowmeters worldwide
- Provide a detailed forecast of the market for all gas flowmeters in dollars and unit volume through 2008

- Provide market and product strategies for suppliers of all gas flowmeters worldwide
- Provide company profiles of the leading suppliers of gas flowmeters worldwide

Industries Included

This study includes the process industries, which are as follows:

- Oil & Gas (includes production, transportation, and distribution)
- Refining
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- Other (includes semiconductor, cement, ceramic, rubber, paint, and other process industries)

While this study mainly includes the process industries, it was necessary for several technologies to include shipments of flowmeters outside the process industries. This was true for positive displacement, turbine, and variable area flowmeters. Because these types of flowmeters are widely used outside the process industries, limiting the scope of the analysis of these flowmeters to the process industries would have considerably reduced the value and interest of this study.

Flowmeter Sizes

This study also provides data on shipments of flowmeters in terms of flowmeter size. In some cases, such as for DP flowmeters, line sizes rather than actual flowmeter sizes are used. The sizes used are as follows:

- > 0 to 2 inches
- > 2 to 6 inches
- > 6 to 20 inches
- > 20 inches

Data is given in terms of revenues beginning with flowmeters shipped in 2003.

Flowmeter Applications

The following applications are included in this study:

- Custody Transfer of Natural Gas (CTNG)
- Non-Custody Transfer of Natural Gas (Non-CTNG)
- Process Gas Measurement
- Gas Utility and Billing Applications
- Large Pipe
- Other

“CTNG” includes custody transfer of natural gas on the pipeline and transmission side. It does not include gas flow measurement for utility and billing applications.

“Non-CTNG” includes check metering, and the non-custody transfer measurement of natural gas outside of process plants.

“Process Gas Measurement” includes all gas flow measurement that occurs inside process plants.

“Gas Utility and Billing Applications” includes measurement of gas flow for utility and billing purposes. This type of measurement is often done to determine how much gas is used at a commercial or industrial facility, as well as at a process plant.

“Large Pipe” applications include combustion air and stack gas measurement. It also includes flare gas measurement. It does not include the measurement of gas flow inside a process plant that happens to occur in large pipes.

“Other” includes compressed natural gas and other gas flow applications that do not fall under any of the other categories listed. Also included in Other are semiconductor, HVAC, automotive, laboratory, and research applications that do not fit into the previously listed categories.

Shipments of Gas Flowmeters by Region

The worldwide gas flowmeter market equaled \$680 million in 2003, and continued to grow in 2004 (see: Figure 1-1). The study projects revenues from the sale of gas flowmeters through 2008. Worldwide sales are segmented by the geographies of North America, Europe, Japan, Asia without Japan, and the Rest of the World. Revenues, Compound Annual Growth Rates and all other data are provided for all regions of the study in both charts and tables.

The study provides average selling prices for all gas flowmeters. The average selling prices are ranked by flowmeter type and also by study region. All data is provided in both charts and tables.

Shipments of Gas Flowmeters by Flowmeter Type

Shipment values for all types of flowmeters are provided by geographic region. Also included are in-depth discussions of traditional technology versus new-technology flowmeters, and the reasons why traditional flowmeters continue to reign. The study explores custody transfer, billing, utility and other natural gas applications. Looking at all new-technology flowmeters, the study discusses and describes the reasons why ultrasonic flowmeters are gaining market share so rapidly in the gas flow market. Another area of interest is important predictive analysis of which flowmeters are expected to decline in importance through 2008.

The study also provides insight into what the world of flowmeter shipments and revenues will look like in 2008. Using charts and tables, this study section explains the basis for the forecasts of how the market will look in the next several years.

Market Shares for the Suppliers of Gas Flowmeters

The major suppliers of flowmeters for gas applications are ranked in order of their market share. Familiar names such as Actaris, Aichi Tokei Denki, American Meter, Dresser, Elster, Emerson Rosemount, Instromet, and Sensus are discussed and described. And despite all the attention paid to the market for custody transfer of natural gas on the pipeline side, the study reveals and describes the actual largest segment of the market.

Tap Into the Fast-Growing Market for Gas Flow Measurement

All new-technology meters (except for magnetic flowmeters) can measure gas flow. The market for gas flow measurement is at least twice the size as the market for steam flow measurement. The study also finds that it is growing faster than the steam flow measurement market. Because natural gas is a substitute for oil (as a preferred fuel in power plants, for example) a lot more attention is being paid to natural gas flow measurement today. Natural gas custody transfer has become a high-growth market. At the same time, process gases are widely measured in the chemical industry, and in many other process industries as well.

The American Gas Association (AGA) has evaluated flowmeters for custody transfer of natural gas. The study goes beyond the AGA evaluation and identifies the flowmeter types which have the best chances of making gains in the gas flow market.

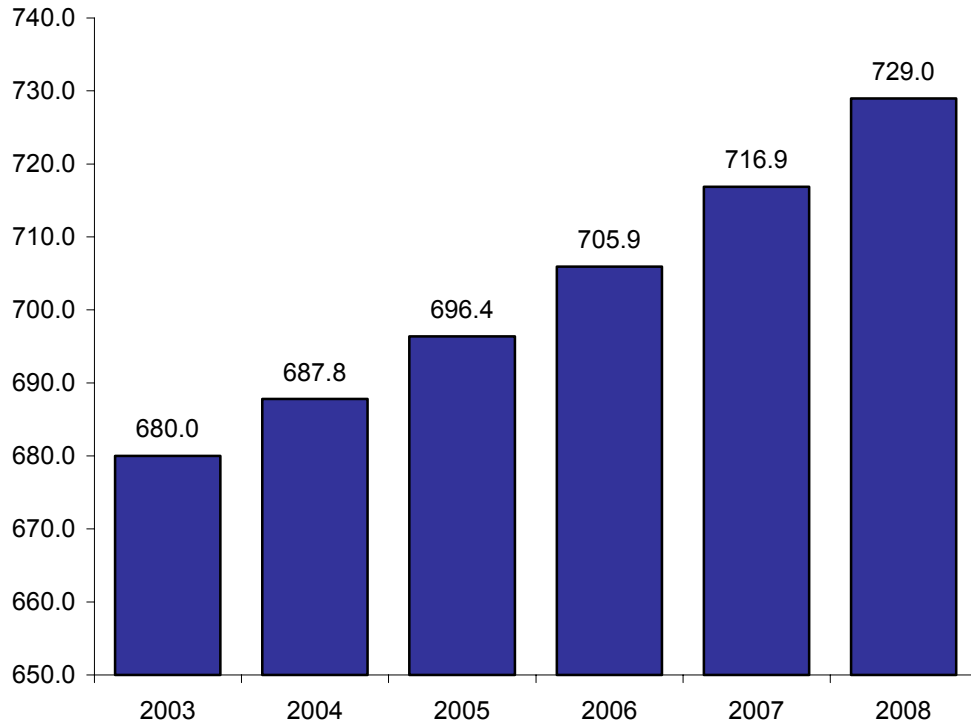
Emphasis on the Accuracy and Reliability of Gas Flowmeters

The desires for accurate and reliable flowmeters are the two strongest driving forces in the flowmeter market today. More than any other factors, it is the accuracy and

reliability of new-technology flowmeters that set them apart from traditional technology flowmeters.

New-technology flowmeters win the reliability battle. With a few minor exceptions, new-technology meters do not have moving parts to wear out. They also are much less intrusive than most traditional technology meters. This is not to say that new-technology are not subject to any type of wear, or that they are completely nonintrusive. The bore of any inline meter is subject to wear. The transducers of ultrasonic meters are slightly intrusive. However, new-technology meters are much less subject to wear and much less intrusive than traditional technology meters.

Figure 1-1
Total Shipments of Gas Flowmeters Worldwide
(Millions of Dollars)



(With CAGR of 1.4%)

The World Market for Gas Flow Measurement

Book One: New-Technology Flowmeters

Book Two: Traditional Technology Flowmeters

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