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Forces and Dynamics of the Flowmeter Market, 1992-2025

**FORCES AND DYNAMICS
OF THE FLOWMETER MARKET**
1992-2025

**Predict the future
from the past**

How internal dynamics and global forces
have shaped flowmeter demand for 33 years—
and what those patterns reveal about the future

1992 1995 2000 2005 2010 2015 2020 2025

FLOW RESEARCH
GLOBAL PERSPECTIVE
INDUSTRY DYNAMICS
33 YEARS OF DATA & INSIGHT
PATTERNS THAT REVEAL THE FUTURE

MARKET INTELLIGENCE SINCE 1992

The book cover features a dark blue background with a central image of a flowmeter and a globe. The flowmeter is a blue and silver industrial device with a digital display showing '12345 m³/h'. The globe is a blue wireframe sphere with a white line graph overlaid on it. The x-axis of the graph is labeled with years from 1992 to 2025 in 5-year increments. The title 'FORCES AND DYNAMICS OF THE FLOWMETER MARKET' is at the top in white and gold, with '1992-2025' below it. The subtitle 'Predict the future from the past' is in large white font. Below the subtitle is a short paragraph in white. At the bottom, there are five icons representing different aspects of the report: a globe, a gear, a bar chart, and a magnifying glass, each with a corresponding label. The Flow Research logo is in the bottom left corner, and the tagline 'MARKET INTELLIGENCE SINCE 1992' is at the very bottom.

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www.flowresearch.com/forces



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Forces and Dynamics of the Flowmeter Market, 1992-2025

In conjunction with our 10th Anniversary Edition of *Volume X, The World Market for Flowmeters*, Flow Research is delivering ***Forces and Dynamics of the Flowmeter Market, 1992-2025: Predict the future from the past.*** This ground-breaking study draws on our lengthy and deep research experience to illustrate how global forces and internal flowmeter market dynamics have affected flowmeter sales. We think it's a powerful testament to the resilience, longevity, and evolution of the flowmeter industry that every flowmeter supplier should have.

We've been analyzing the flowmeter market since 1992 — examining technological trends, determining market size and market leaders, and forecasting growth. That means we have 33 years of meaningful data — data that is not only historically interesting, but that can help you more accurately predict how global disruption and technological changes might affect your flowmeter business.

Now, for the first time ever, we are combining high-level flowmeter market data with a timeline of significant global events impacting the economy to show how internal dynamics and global forces shape flowmeter demand.

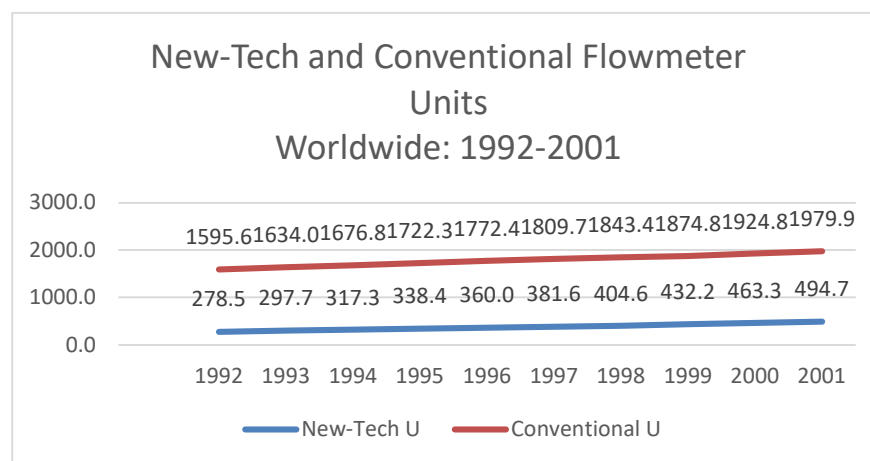
This comprehensive chronicle of flowmeters over the last 33 years provides unmistakable relevance for future planning. We present:

- Worldwide flowmeter revenue, units, and compound annual growth rate (CAGR) for all 10 technology types: Coriolis, magnetic, ultrasonic, vortex, thermal, differential pressure, primary elements, turbine, open channel, and variable area
- Company market shares by technology type
- Flowmeter and market share data as well as analysis broken down into eight segments:
 - All 33 years: 1992-2025
 - 2002-2006
 - 2007-2010
 - 2011-2014
 - 2015-2018
 - 2019-2022
 - 2023-2025

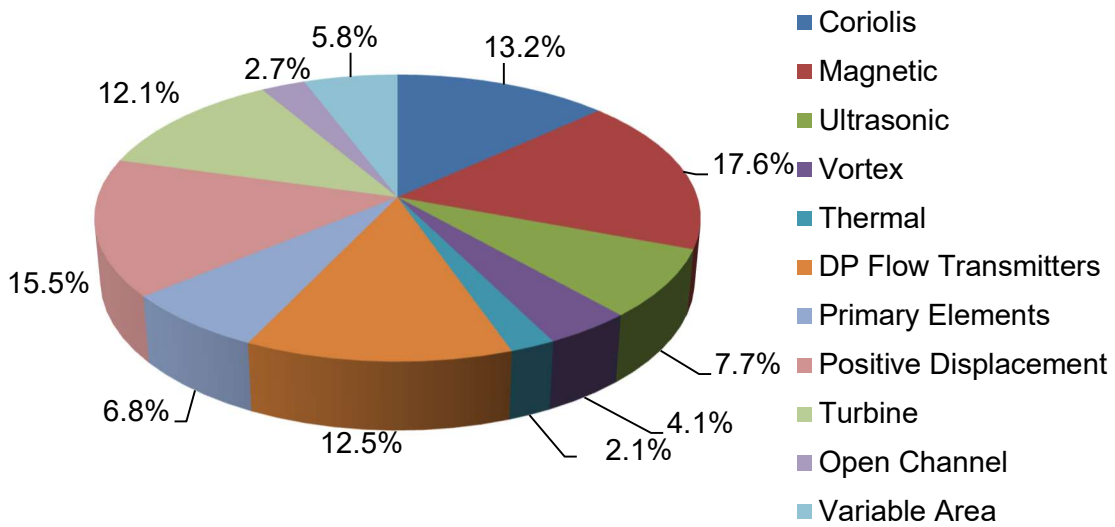
- Depiction and analysis of how the flowmeter market responded to global forces, including:
 - Early 1990s recession during post–Cold War adjustment
 - Asian financial crisis (1997–1998)
 - Dot-com crash + industrial slowdown (2000-2002)
 - China-led global expansion (2003-2008)
 - Global financial crisis (2008-2009)
 - Oil price collapse (2014–2016) and later boom (XX-XX)
 - COVID-19 pandemic (2020)
 - Post-COVID rebound + supply chain inflation (2021-2023)
- Depiction and analysis of how internal dynamics within the flowmeter market impacted market shares, flowmeter revenue, and supplier success:
 - Movement over time from conventional to new technology flowmeters
 - 33-year competition by Coriolis and magnetic flowmeters as revenue leader
 - How companies adapted to acquisitions and mergers in various ways, including branding, product consolidation, portfolio expansion, organizational structure
 - Significant new product introductions over the years and their impact
 - How evolving material types, line sizes, product features, and capabilities have helped the industry to adapt to increasingly demanding industry and application needs
 - Impact of protocols and industry approvals
- Company profiles of major flowmeter suppliers

Tables and Charts

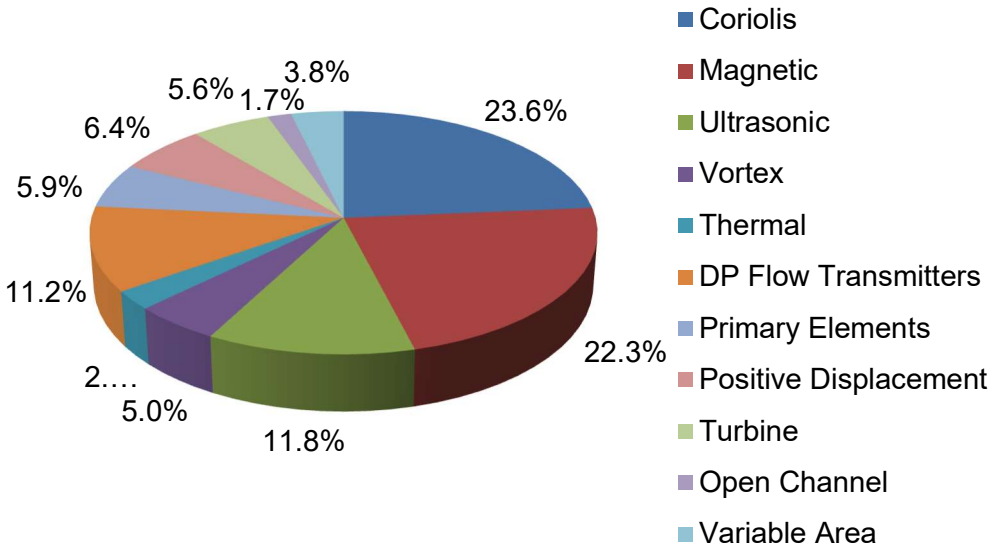
This report uses tables and color charts like these to present the data.



The Worldwide Flowmeter Market in Revenues by Type in 2002



The Worldwide Flowmeter Market in Revenues by Type in 2022

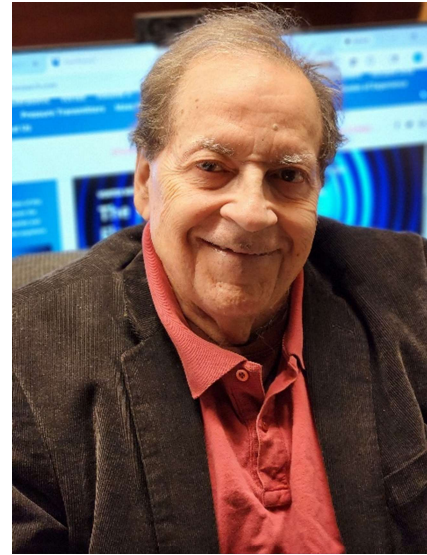


**Shipments of All Flowmeters Worldwide by Technology
(Millions of Dollars)**

Tech- nology	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	CAGR
Coriolis	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Magnetic	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Ultrasonic	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Vortex	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Thermal	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
DP	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
PD	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Turbine	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Open Ch.	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
VA	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%
Total	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	xxx.x	x.x%

Flow Research, Inc.

Flow Research is the only market research company that publishes studies on all nine flowmeter types and whose primary mission is to research process control instrumentation markets. In addition to studies on both new and conventional flowmeter types, we have researched pressure transmitters; temperature sensors and transmitters, infrared thermometers and thermal imagers; level devices; analytical instrumentation; and selected API-certified valves. We also publish studies on oil & gas and other major flowmeter markets. In addition, Flow Research started a working group on flowmeter calibration (FRWG.org) and published two studies on flowmeter calibration facilities, one each for liquids and gas.



Dr. Jesse Yoder, president and founder of Flow Research

Partnerships and Alliances

Flow Research helps flowmeter companies form alliances and partnerships to provide specific solutions or broaden their customer base and distribution channels. These partnerships can include manufacturers of valves, hoses, transmitters, or other flow-related products, as well as other flowmeter manufacturers.

Distributorships

Are you thinking about expanding your presence in the U.S.? We can help you find distributors for your flowmeters and other instrumentation.

Custom Projects

Companies commission us for custom projects when they want more detailed information on a specific subject than is possible in an off-the-shelf report. They may be evaluating the future or expansion of a product line, determining whether to acquire or merge with another company, or seeking to better understand their customer needs.

Consulting

We also work with companies individually to formulate strategies that help them succeed in an increasingly complex world. Dr. Yoder and his team have studied hundreds of companies and have advised most of the top flowmeter suppliers on market and product strategies.

Research Team Background

Dr. Jesse Yoder, the lead analyst for this study, is President of Flow Research Inc., which he founded in 1998. He has worked as a writer and analyst in process control and instrumentation since 1987 and has created market research studies since 1990. Since then, he has written over 280 market research studies, most of them on flow and instrumentation, and over 300 articles on flow and instrumentation for trade journals.

Dr. Yoder received a PhD in philosophy from the University of Massachusetts Amherst in 1984 and spent 10 years as an adjunct philosophy professor at the University of Massachusetts Lowell and Lafayette College. Dr. Yoder also worked for 10 years as a technical writer, including for the process control division of Siemens, and taught technical writing at Northeastern University and the UMass Lowell.

Dr. Yoder has received two U.S. patents for the flowtube meter, a new dual tube/dual sensor method of measuring flow, in 2015 and 2017. This meter's two prototypes have been tested at CEESI in Nunn, Colorado.

In 2015, ISA published Dr. Yoder's book, [*The Tao of Measurement*](#), with Richard E. Morley as co-contributor. Topics included temperature, pressure, flow, time, length, and area. CRC Press published Dr. Yoder's two-book set, [*Advances in Flowmeter Technology*](#), on the history, operating principles, growth factors, representative companies, and frontiers of research for all 10 types of flowmeters. Both books, *New-Technology Flowmeters* and *Conventional Flowmeters*, were published in 2023. CRC Press is publishing his latest book, *Mass Flow Measurement*, in June 2026.

Belinda Burum, Vice President, joined Flow Research in 2002. Since then, she has served as senior strategic advisor and been involved with most of our projects and publications. She has also



Belinda Burum

worked as a writer and editor in journalism, advertising, and high tech marketing communications and customer references for 40+ years in the U.S. and Switzerland and is a published author and book editor.

Leslie Buchanan, Research and Publication Production Associate, joined Flow Research in 2010 with skills from a variety of work and life experiences in both the US and abroad. She assists with research and writing, and handles many publication aspects of Flow Research studies.



Leslie Buchanan

Dan Sparks, Research Director, earned a PhD in chemistry from the University of North Carolina, Chapel Hill. He served as director of product management and director of business development for Omega Engineering in Norwalk, Connecticut until February 2023, and before that was marketing director at Watlow; vice president and general manager at MTS Systems.



Dan Sparks

For more information on Flow Research, please visit our website at www.flowresearch.com. Please follow us on Facebook, LinkedIn (Flow Research, Inc.), and Instagram. We also invite you to join our Flow Research LinkedIn groups.

Recent and Currently Scheduled Flow Research Studies

New-Technology Flowmeter Studies

The World Market for Coriolis Flowmeters, 8 th Edition	flowresearch.com/coriolis
The World Market for Magnetic Flowmeters, 8 th Edition	flowresearch.com/mag
The World Market for Ultrasonic Flowmeters, 8 th Edition	flowresearch.com/ultrasonic
The World Market for Vortex Flowmeters, 8 th Edition	flowresearch.com/vortex
The World Market for Thermal Flowmeters, 3 rd Edition	flowresearch.com/thermal
The World Market for Mass Flow Controllers, 4 th Edition	flowresearch.com/mfc
The World Market for Multiphase Flowmeters, 2 nd Edition	flowresearch.com/multiphase
Multiphase: Module A: The World Market for Watercut Meters	flowresearch.com/watercut

Conventional Flowmeter Studies

The World Market for Pressure Transmitters, 5 th Edition	flowresearch.com/pressure
The World Market for Primary Elements, 3 rd Edition	flowresearch.com/flowplate
The World Market for Positive Displacement Flowmeters, 3 rd Edition	flowresearch.com/pd
The World Market for Turbine Flowmeters, 3 rd Edition	flowresearch.com/turbine
The World Market for Variable Area Flowmeters	flowresearch.com/va

Cross-Technology Flowmeter Studies

Volume X: The World Market for Flowmeters, 10 th Edition	flowresearch.com/volumex
Volume X: Module A: Strategies, Industries, and Applications	flowresearch.com/volumex
The World Market for Gas Flow Measurement, 5 th Edition	flowresearch.com/gasflow
Gas Module A: Hydrogen, Natural Gas, and Other Applications	flowresearch.com/gasflow
Flowmeters in the Oil & Gas Industry	flowresearch.com/oilflow

Flow Calibration Studies

Core Study: Worldwide Gas Flow Calibration Facilities and Markets	flowresearch.com/calibration
Module A: Worldwide Liquid Flow Calibration Facilities and Markets	flowresearch.com/calibration

Temperature

Market for Temperature Sensors in the Americas, 3 rd Edition	flowresearch.com/temp
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Why you must have this one-of-a-kind study

- Look back at history to look forward in your business
- More accurately predict how global disruption and technological changes might affect your flowmeter business

- Track patterns that reveal the future
- Understand how oil prices have affected the flowmeter market
- See clearly how flow technologies have stacked up against each other over the years
- Benefit from knowledge gleaned from 33 years of data and 280+ studies
- Profit from a global view of market trends at a price you can afford
- Clearly understand and track market growth from the past into the future



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Why Flow Research? We . . .

- Specialize in flowmeter markets and technologies
- Research all flowmeter types
- Study suppliers, distributors, *and* end users
- Provide a unique perspective through our worldwide network of contacts
- See our mission as supplying the data to help your business succeed