The World Market for Ultrasonic Flowmeters, 8th Edition

Flow Research covers this fast-growing market in three parts: a Core Study and two Modules that analyze the Inline, Clamp-On, and Insertion markets.

Choose the modules that best fit your needs!

— OVERVIEW —

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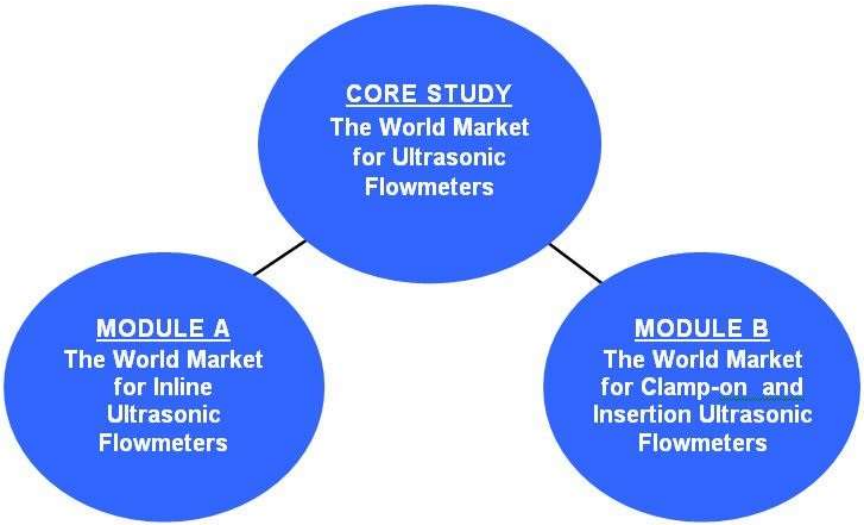
Worldwide Ultrasonic Flowmeter Studies

Flow Research is working on a new set of three market studies on the worldwide ultrasonic flowmeter market, one of the most dynamic flowmeter markets. These studies will determine the size of the ultrasonic flowmeter market in 2025 and forecast its market size through 2030:

- ***Core Study:*** **The World Market for Ultrasonic Flowmeters, 8th Edition**
- ***Module A:*** **The World Market for Inline Ultrasonic Flowmeters**
- ***Module B:*** **The World Market for Clamp-on and Insertion Ultrasonic Flowmeters**

We believe Flow Research is the only company to provide such a comprehensive analysis of the worldwide ultrasonic flowmeter market.



Why three studies? See the forest *and* the trees.

The ultrasonic flowmeter market is unique in that it consists of three distinct types (inline, clamp-on, and insertion) with fundamentally different applications and industries. Some companies manufacture only one or two of the three types. We divide the research results into a Core Study and two Modules, and analyze the inline, clamp-on, and insertion markets individually.

By separating the data into individual studies, we can provide much more information than in a single study on the entire market – and you can choose detailed research on only the flowmeter types that you manufacture or interest you. This method enables us to separate out unit price and unit quantity data for each technology, and provide a distinctive analysis for each of these three fundamentally different ultrasonic flowmeter types.

The three studies offer:

- Market size for all types of ultrasonic flowmeters in 2025 and 2030 worldwide and by region
- Market shares for all types of ultrasonic flowmeters in 2025 worldwide and by region
- Market growth and forecasts for all types of ultrasonic flowmeters through 2030
- Industries and applications where ultrasonic flowmeters are currently used, and areas of new market growth
- Product analyses for the main companies selling into the ultrasonic flowmeter market
- Supplier strategies for selling into the ultrasonic flowmeter market
- Company profiles of the main ultrasonic flowmeter suppliers

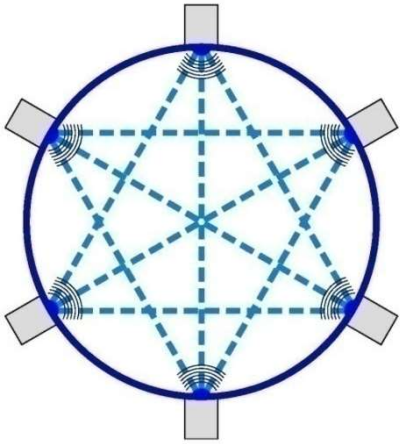
Rationale for Studies

The dynamic ultrasonic flowmeter market is driven in part by the expanding market for custody transfer of natural gas – a segment where ultrasonic flowmeters excel. Both user interest and market growth are strong in ultrasonic as well as other new-technology process control instrumentation: Coriolis, magnetic, vortex, and thermal flowmeters.

We have followed the new-technology flowmeter market closely since 2000. We completed our first ultrasonic study in 2001, followed by the 2nd Edition in 2003, the 3rd Edition in 2008, the 4th Edition in 2013, the 5th Edition in 2017, the 6th Edition in 2021, and the 7th Edition in 2023. This 8th Edition of our ultrasonic studies set builds on the knowledge gained over the years, but also represents a completely fresh look at the market.

Technology Differences

One important issue we will explore is the contrast in growth between **transit time** and **Doppler** flowmeters. While Doppler flowmeters remain an excellent solution for dirty liquids, transit time flowmeters have been showing faster growth in recent years. Much of the new product development is going into transit time meters. Transit time flowmeters are typically more accurate than Doppler meters, and multipath transit time meters have become more widely used for custody transfer of natural gas.



End view illustration of an ultrasonic flowmeter showing 9 of its 18 non-parallel paths

These studies also will analyze the market for **multipath** ultrasonic meters for both gas and liquid, and segment this market by number of paths. The ultrasonic flowmeter market for custody transfer of natural gas is one of the fastest growing markets within flow. We expect multipath meters for petroleum liquids to continue to show significant growth.

Key issues we plan to address

- Contrast in growth between transit time and Doppler flowmeters
- The market for multipath ultrasonic meters segmented by number of paths
- Contrast between inline, clamp-on, and insertion ultrasonic flowmeter growth
- Comparisons of portable vs. fixed clamp-on ultrasonic flowmeters
- Expanding use of ultrasonic flowmeters for custody transfer of natural gas
- New entrants in the ultrasonic flowmeter market
- Mergers and acquisitions in the ultrasonic flowmeter market

Core Study: The World Market for Ultrasonic Flowmeters

The **Core Study** is designed to provide a comprehensive view of the entire ultrasonic flowmeter market, and to combine the most important segmentation data of the inline (spoolpiece), insertion, and clamp-on components of this market. It includes all three submarkets of the worldwide ultrasonic flowmeter market:

- Inline ultrasonic flowmeters
- Clamp-on ultrasonic flowmeters
- Insertion ultrasonic flowmeters

The study presents high-level data on the three submarkets and combines the totals into a single ultrasonic flowmeter market view. So, if you need to know the geographic breakout of the total ultrasonic market, rather than only the geographic breakout for clamp-on meters, then the Core Study will provide that answer. Likewise, if you need to know the segmentation by fluid type or by industry for the total ultrasonic market, you can find the answers in the Core Study.

Study Organization

The Core Study bases its segmentation on the worldwide findings of the two companion standalone studies, Modules A (inline) and B (clamp-on and insertion), which provide more detailed segmentation. It segments the three technologies by eight geographic regions and presents worldwide totals for each of the technologies. We also include the average selling price for ultrasonic flowmeters worldwide and by region. The Core Study reviews nine other flowmeter technologies, shares growth factors relevant to ultrasonic flowmeters, and provides product analysis for each of the major suppliers.

The study provides worldwide market size data for 2025 in both dollars and units for each of the three ultrasonic technologies and by geographic region. It also provides forecast data for each technology type both worldwide and by region for each year of the study period from 2025 through 2030. Market data includes CAGR (compound average growth rates) for each region through 2030.

Segmentation

Geographic Segmentation

- North America (United States and Canada)
- Western Europe
- Eastern Europe / Former Soviet Union (FSU)
- Mideast / Africa
- Japan
- China
- Asia / Pacific (including India)
- Latin America (Mexico, Central and South America)

Shipments of All Ultrasonic Flowmeters Worldwide and by Region

CORE STUDY
All Ultrasonic Flowmeters

Type

- Inline
- Clamp-on
- Insertion

Average Selling Price

- Worldwide
- By Region

Fluid Type

- Petroleum Liquids
- Non-petroleum Liquids
- Gas
- Steam

Market Shares of Ultrasonic Flowmeter Manufacturers

- Worldwide
- Inline
- Clamp-on
- Insertion

Industry

- Oil & Gas
- Refining (refineries, gas processing)
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- Other

Inline Ultrasonic Flowmeters by Distribution Channel

- Direct Sales
- Independent Representatives
- Distributors
- E-Business

Clamp-on and Insertion Ultrasonic Flowmeters by Distribution Channel

- Direct Sales
- Independent Representatives
- Distributors
- E-Business

Inline Ultrasonic Flowmeters by Customer Type

- End-users
- Original Equipment Manufacturers (OEMs)
- Systems Integrators
- Engineers/Consultants

Clamp-on and Insertion Ultrasonic Flowmeters by Customer Type

- End-users
- Original Equipment Manufacturers (OEMs)
- Systems Integrators
- Engineers/Consultants

Strategies for Success

- Competitive points of product emphasis
- Discussion of market forces at work
- Pursuing new applications
- Technical developments
- Customer education and other market strategies and tactics
- Acquisitions and product partnerships
- Forming alliances to enhance product offerings

Company Profiles

- Business profiles of the main suppliers of ultrasonic flowmeters
- Histories, current organization
- Overall product line summaries
- Ultrasonic flowmeter product line descriptions

CORE STUDY
All Ultrasonic Flowmeters

The following are some of the many companies we are profiling in the Core Study and Modules A and B:

- Anhui Jujie Automation Technology
- Badger Meter
- Eastech Flow Controls
- Emerson
- Endress+Hauser/SICK
- Faure Herman – Ultraflux
- FLEXIM
- Fluenta
- FTI Flow Technology, Inc.
- Fuji Electric
- GF Piping Systems
- Goldcard Smart Group
- GWF
- Honeywell Elster
- Höntzsch
- IDEC Corporation: Accusonic
- KROHNE
- OVAL Corporation
- Panametrics
- Rittmeyer
- RMG
- Sensia
- Siemens
- Tecfluid
- TechnipFMC
- Tokyo Keiki
- Tokyo Keiso
- Vortek Instruments (div. of TASI)
- XSENS Technologies
- And more

Publication Date

Core Study:
The World Market for Ultrasonic Flowmeters, 8th Edition

Q4 2026

Flow Research Gold Partner Program

By becoming a Gold Partner, you can enjoy a significant discount on the regular price of the study.

Being a Gold Partner requires making an early commitment to purchase the study, but you can make payments either in one amount at the beginning of the study or split into two, with the second payment due upon delivery of the study.

For more details, please contact Jesse Yoder at +1 781 245-3200 or jesse@flowresearch.com.

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Module A: The World Market for Inline Ultrasonic Flowmeters

MODULE A
Inline Ultrasonic Flowmeters

The inline market is quite different from the clamp-on and insertion markets in applications, industries, price points, and many other factors. By isolating the inline (spoolpiece) market from the clamp-on and insertion markets, we provide a much more compelling and informative analysis.

Multipath inline ultrasonic flowmeters are especially important in the fast-growing market for custody transfer of natural gas. In this module we analyze the inline market in terms of dollar and unit shipments worldwide and by region, as well as by average selling prices worldwide and by region.

This study provides segmentation for 15 categories:

- Technology Type
- Single/Dual Path Transit Time
- Multipath Transit Time
- Mounting Type
- Single and Dual Transmitters
- Fluid Type
- Intelligence Level
- Communication Protocol
- Petroleum Liquids Applications
- Non-petroleum Liquids Applications
- Gas Applications
- Line Size
- Industry
- Distribution Channel
- Customer Type

What's in this for your company?

- See the emerging applications and where the growth is
- Understand world and regional markets
- Get to know your real competition
- Learn what other suppliers manufacture, where, and for whom
- Rely on the best information for the best decisions

Module A: Worldwide Data Segmentation

All segmentation for this inline ultrasonic flowmeter study is provided worldwide as well as by the eight geographic regions below, with forecast data through 2027.

Geographic Segmentation

- North America (United States and Canada)
- Western Europe
- Eastern Europe/FSU (Former Soviet Union)
- Mideast/Africa
- Japan
- China
- Asia/Pacific (including India)
- Latin America (Mexico, Central and South America)

MODULE A
Inline

Shipments of Inline Ultrasonic Flowmeters Worldwide and by Region in Revenues and Units

Worldwide and by Region by Technology Type

- Transit Time – Single Path / Dual Path
- Transit Time – Multipath

Plus individual segments for **Shipments of each of the Technology Types above** Worldwide and by Region

Average Selling Prices of All Inline Ultrasonic Flowmeters Worldwide and by Region

Average Selling Prices of Inline Ultrasonic Flowmeters Worldwide by Region by Technology

- Transit Time – Single Path/Dual Path
- Transit Time – Multipath

Shipments of Inline Ultrasonic Flowmeters Worldwide by Mounting Type

- Wafer
- Flanged
- Other

Market Shares of Inline Ultrasonic Flowmeter Manufacturers

- Worldwide and by geographic region

Shipments of Inline Ultrasonic Flowmeters Worldwide by Configuration

- Single transmitter
- Dual transmitter

Shipments of Inline Ultrasonic Flowmeters Worldwide and by Region

Intelligence Level

- Smart
- Conventional

Communication Protocol (smart meters)

- HART (wired)
- Foundation Fieldbus™
- Profibus®
- Modbus
- Ethernet
- Wireless
- Other

(Inline Ultrasonic Flowmeters continued)

MODULE A
Inline

Fluid Type

- Petroleum Liquids
- Non-petroleum Liquids
- Gas
- Steam

Petroleum Liquid Applications

- Custody Transfer of Petroleum Liquids
- Check Metering
- Leak Detection (upstream / midstream / downstream)
- Liquefied Natural Gas (LNG) including custody transfer and other applications
- In-plant Process Measurement
- Other

Non-petroleum Liquid Applications

- Custody Transfer of Non-petroleum Liquids
- Check Metering
- Water Treatment/Disposal/Reinjection of Oil/Gas Wells
- In-plant Process Measurement
- Batch / Filling
- Other

Industry

- Upstream Oil & Gas
- Midstream Oil & Gas
- Refining (Oil / Gas Processing / Treatment)
- Downstream Oil & Gas (transportation, distribution)
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- Other

Gas Applications

- Custody Transfer of Natural Gas
- Check Metering
- Leak Detection
- Process Measurement
- Compressed Natural Gas (CNG)
- Flare / Stack Gas Flow Measurement
- Other

Line Size

- ≤ 2 inches
- > 2–4 inches
- > 4–8 inches
- > 8–12 inches
- > 12–24 inches
- > 24 inches

Distribution Channel

- Direct Sales
- Independent Representatives
- Distributors
- E-Business

Customer Type

- End Users
- Original Equipment Manufacturers (OEMs)
- Systems Integrators
- Engineers/Consultants

Strategies for Success

- Growth factors and technologies effecting change in the market
- Strategies for selling into the competitive inline ultrasonic flowmeter market

Company Profiles of the main suppliers of inline ultrasonic flowmeters

- Histories, current organization, overall product line summaries
- Inline ultrasonic flowmeter product line descriptions
- Company strategies

Publication Date:

***Module A:* The World Market for Inline Ultrasonic Flowmeters**

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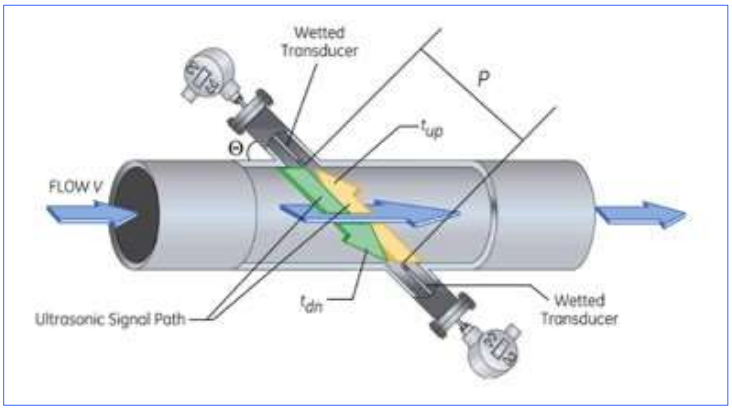

Christian Doppler

Module B: The World Market for Clamp-on and Insertion Ultrasonic Flowmeters

MODULE B
Clamp-on and Insertion Ultrasonic Flowmeters

Clamp-on devices are highly versatile. They can be used as portable or fixed meters for economical meter upgrades, as check meters, and in a host of other applications. Insertion devices permit users to obtain the benefits of ultrasonic technology in virtually any line size. The segmentation in ***Module B:* The World Market for Clamp-On and Insertion Ultrasonic Flowmeters**, will provide a comprehensive view of these two ultrasonic flowmeter technologies, their markets, and their unique qualities and advantages.

Module B: Worldwide Data Segmentation

All segmentation will be provided worldwide as well as by the eight geographic regions below, with a base year of 2025 and forecast data provided through 2030. This study will provide a **separate section** of segmentation **for clamp-on** ultrasonic flowmeters **and** a **separate section** of segmentation **for insertion** ultrasonic flowmeters.

Note: **Distribution Channels** and **Customer Types** for clamp-on and insertion ultrasonic flowmeters combined are included in the Core Study segmentation.

Geographic Segmentation

- North America (United States and Canada)
- Western Europe
- Eastern Europe/FSU (Former Soviet Union)
- Mideast/Africa
- Japan
- China
- Asia/Pacific (including India)
- Latin America (Mexico, Central and South America)

Clamp-On Ultrasonic Flowmeters

Shipments of Clamp-On Ultrasonic Flowmeters Worldwide and by Region
Technology

- Transit Time – Single/Dual Path
- Transit Time – Multipath
- Doppler

Plus individual shipments and forecasts of each of the Technology Types above Worldwide and by Region

(Clamp-On Ultrasonic Flowmeters continued)

MODULE B
Clamp-on and Insertion

Average Selling Prices

- Average selling prices for all eight regions

Average Selling Prices by Technology Type

- Transit Time – Single/Dual Path
- Transit Time – Multipath
- Doppler

Mounting Type

- Portable
- Fixed

Fluid Type

- Petroleum Liquids
- Non-petroleum Liquids
- Gas
- Steam

Liquid Applications

- Check Metering
- Leak Detection (upstream / midstream / downstream)
- Liquefied Natural Gas (LNG) – including all applications
- In-plant Process Measurement
- Other

Industry

- Upstream Oil & Gas (exploration & production)
- Midstream Oil & Gas (from upstream to refining/processing facility)
- Refining
- Downstream Oil & Gas (refined product transportation and distribution)
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- Other

Market Shares for Leading Suppliers of Clamp-on Ultrasonic Flowmeters

- Worldwide
- For each geographic region

Insertion Ultrasonic Flowmeters

MODULE B
Clamp-on and Insertion

Geographic Segmentation

- North America (United States and Canada)
- Western Europe
- Eastern Europe/Former Soviet Union (FSU)
- Mideast/Africa
- Japan
- China
- Asia/Pacific
- Latin America (Mexico, Central and South America)

Shipments of Insertion Ultrasonic Flowmeters Worldwide and by Region

Technology

- Transit Time – Single/Dual Path
- Transit Time – Multipath
- Doppler

Plus individual segments for **Shipments of each of the Technology Types above**

Average Selling Prices

- Worldwide by all eight regions

and by Technology Type

- Transit Time – Single/Dual Path
- Transit Time – Multipath
- Doppler

Fluid Type

- Petroleum Liquids
- Non-petroleum Liquids
- Gas
- Steam

Industry

- Oil & Gas
- Refining
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- Other

Application

- Check Metering
- Flare/Stack Gas Flow Measurement
- In-plant Process Measurement
- Other

Market Shares for Leading Suppliers of Insertion Ultrasonic Flowmeters

- Worldwide
- For each geographic region

Strategies for Success

- Growth factors and technologies effecting change
- Strategies for selling into the competitive clamp-on and insertion markets

Company Profiles

- Business profiles of the main suppliers of clamp-on and insertion ultrasonic flowmeters
- Histories, current organization, overall product line summaries
- Clamp-on and insertion ultrasonic flowmeter product line descriptions
- Company strategies

MODULE B
Clamp-on and Insertion

Publication Date

Module B:
The World Market for Clamp-on and Insertion Ultrasonic Flowmeters

Q4 2026

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Seven reasons to sign up for these studies today!

- 1,200+ pages in the three studies with a complete analysis of the inline, clamp-on, and insertion ultrasonic flowmeter markets.
- Only market research study available that clearly separates the data on the inline, clamp-on, and insertion ultrasonic flowmeter markets.
- Backed up by 20+ years of research into the ultrasonic and competing flowmeter markets.
- Completely analyzes the ultrasonic flowmeter market, including market size, market forecasts, market shares, strategies for success, and supplier profiles.
- We visit our clients for in-person interviews and to see the production and calibration facilities. We have visited clients multiple times in the United States, Europe, the Middle East, and Australia.
- We attend industry conferences for in-person contact and to track the latest developments. This year so far we attended the MCAA Industry Forum (Arlington, Texas) and the CEESI Gas Ultrasonic Conference (Colorado Springs, Colorado).
- Brought to you by Flow Research, the world's leading market research company on flowmeters and instrumentation.

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 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.

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. The first volume, *New-Technology Flowmeters*, published September 6, 2022, was followed by *Conventional Flowmeters* on December 15.

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.

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 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.

Belinda Burum

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

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Recent and Currently Scheduled Flow Research Studies

New-Technology Flowmeter Studies

The World Market for Coriolis Flowmeters, 8th Edition	flowresearch.com/coriolis
The World Market for Magnetic Flowmeters, 8th Edition	flowresearch.com/mag
The World Market for Ultrasonic Flowmeters, 8th Edition	flowresearch.com/ultrasonic
The World Market for Vortex Flowmeters, 8th Edition	flowresearch.com/vortex
The World Market for Thermal Flowmeters, 3rd Edition	flowresearch.com/thermal
The World Market for Mass Flow Controllers, 4th Edition	flowresearch.com/mfc
The World Market for Multiphase Flowmeters, 2nd 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, 5th Edition	flowresearch.com/pressure
The World Market for Primary Elements, 2nd Edition	flowresearch.com/flowplate
The World Market for Positive Displacement Flowmeters, 3rd Edition	flowresearch.com/pd
The World Market for Turbine Flowmeters, 3rd 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, 10th Edition	flowresearch.com/volumex
Volume X: Module A: Strategies, Industries, and Applications	flowresearch.com/volumex
The World Market for Gas Flow Measurement, 5th 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, 3rd Edition	flowresearch.com/temp

The World Market for Ultrasonic Flowmeters, 8th Edition

— OVERVIEW —

Oman Gas Company *Photo by Flow Research*

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Why Flow Research? We . . .

- Are the only company whose sole focus is the flowmeter instrumentation market
- Research all new-technology and conventional flowmeters
- Contact every known supplier
- Offer our studies in both electronic and color-printed hardcopy versions
- Draw on flowmeter data dating back to 1992, when we began actively following the market

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