

# The World Market for Gas Flow Measurement, 2<sup>nd</sup> Edition

## Overview



## Featuring Three Add-On Modules

**Publication Date:  
August 2010**



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## The World Market for Gas Flow Measurement, 2<sup>nd</sup> Edition: An Overview

Flow Research is working on a new market study on the worldwide gas flow measurement market. The primary goal of this study is to determine the size of the gas flow measurement market in 2009. Forecasts through 2014 will be included. The study is called **The World Market for Gas Flow Measurement, 2nd Edition**.

The study has multiple purposes:

- To determine worldwide market size for the gas flow measurement in 2009
- To determine worldwide market shares for gas flow measurement market in 2009
- To forecast market growth through 2014 for all eight types of flowmeters used in this market
- To identify the industries and applications where gas flow measurement is used
- To identify market growth sectors
- To provide a product analysis for the main companies selling into the gas flow measurement market
- To provide product descriptions, line size data, and average selling prices in this market
- To provide strategies to manufacturers for selling into the gas flow measurement market
- To provide company profiles of the main suppliers into the gas flow measurement market
- And much more

### Why Flow Research?

- We specialize in flowmeter markets and technologies
- We have researched all flowmeter types
- We study suppliers, distributors, and end-users
- Our worldwide network of contacts provides a unique perspective
- Our mission is to supply the data to help your business succeed

### Rationale for Study

Flow Research published the first edition of our worldwide gas flow measurement study in September 2004. We have been following the gas flow market regularly since then, providing periodic updates in our **Market Barometer** and **Energy Monitor** publications ([www.worldflow.com](http://www.worldflow.com)). We have also done user interviews that show that the interest in gas flow measurement among users remains at a very high level. We believe that this is an optimal time to quantify the growth in this market, and to take another in-depth look at what appears to be an expanding market.

## Key Issues to be Addressed in the Study

Gas flow measurement applications and their associated revenues have grown significantly during the last few years. A major driver of this growth worldwide has been the expansion in demand for natural gas and related energy products. There has also been significant new capital projects growth in large regional economies such as India and China during this time as well.

Our research intends to determine where growth is occurring - and where it is not - in terms of application, industry, and geography. The results of this study will inform the reader about where the highest returns should be expected to occur through 2014 in these three basic market segments.

The box below highlights some of the areas which you may find of greatest interest, and which will comprise the basic building blocks of this study:

### Key Issues Addressed

This study will address the key issues in the gas flow measurement market, including:

- What is the technological state of the market today?
- What applications are growing – and which are not?
- What regions of the world hold the greatest growth prospects – and why?
- Are there new competing technologies to the traditional devices – and what are they?
- What is the current breakdown in use between insertion and inline device types?
- Are there new gas flow measurement standards that must be understood?
- What industries represent the greatest growth potential – and why?
- What are the features that end-users are looking for in gas flow measurement?

## The Founding Sponsor Program

Here at Flow Research, our primary focus is to develop and to make available to you the data which will help your business make informed decisions. The best decisions are most often made with the best information being available at the right time. Thus, we believe it is vital to know what information we must develop in order to best assist our clients, and to continually update this information to maximize its usefulness.

The above is the basic idea behind the *Founding Sponsor Program*. Founding Sponsors have the best opportunity to influence the actual areas of research we will cover in each study. Founding Sponsors receive periodic progress updates as a study is completed. And, Founding Sponsors also receive a sizable discount once the research is ready for publication.

To learn more about the *Founding Sponsors Program*, please review the insert enclosed.

The proposed basic research segmentation is listed in the following pages.

## **Proposed Study Segmentation**

### **Geographic Regions:**

- North America
- Europe, including Central Europe and FSU
- Middle East/Africa
- Japan
- China
- Asia without Japan/China
- Latin America

### **Flowmeter Types:**

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

### **Line Sizes:**

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

### **Application Areas:**

- Custody Transfer of Natural Gas
- Non-Custody Transfer: Natural Gas
- Process Gas Measurement
- Utility Applications
- Stack and Flare Gas
- Compressed Natural Gas (CNG)
- Combustion Gas
- Other

### **What's in this for my 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
- The best information creates the best decisions

## **Proposed Study Segmentation** *(continued)*

### **Industries:**

- Oil and Gas (production/transportation/distribution)
- Refining
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power Generation
- Water & Wastewater
- Other

### **Supplier Market Size and Market Shares:**

- Provided for each technology type
- Forecast information through 2014

### **Sales by Distribution Channel:**

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

### **Gas Measurement Sales by Customer Type:**

- End-Users
- OEMs
- Systems Integrators
- Engineering and Consulting Firms

### **Strategies for Success:**

- Discussion of market forces at work
- Strategic action perspectives
- Real world success stories

+ Average Selling Prices by geographic region

+ Factors contributing to and limiting growth

And more

### **Comprehensive Company Profiles and Product Analyses will include the following firms:**

- ABB
- Brooks Instrument
- Cameron
- Elster-Instromet
- Emerson: Daniel
- Emerson: Micro Motion
- Emerson: Rosemount
- Endress+Hauser
- Fluid Components International
- FMC Measurement Solutions
- GE Sensing
- Honeywell
- Instromet
- Invensys: Foxboro
- Itron: Actaris Metering Systems
- KROHNE
- OVAL Corp.
- Sensus Metering Systems
- Sierra Instruments
- Siemens
- Tokyo Keiso
- Yamatake
- Yokogawa

And others

## Background

Dr. Jesse Yoder is President of Flow Research Inc., a company he founded in 1998. Dr. Yoder has 22 years' experience as a writer and analyst in process control and instrumentation. Since 1990, he has written more than 100 market research studies, most of them in flow and instrumentation. Some of the recent and currently planned Flow Research studies are as follows:

[The World Market for Coriolis Flowmeters, 3<sup>rd</sup> Edition](#) (September 2008)  
[The World Market for Mass Flow Controllers](#) (July 2008)  
[Volume X: The World Market for Flowmeters, 3<sup>rd</sup> Edition](#) (July 2010)  
[The World Market for Gas Flow Measurement, 2<sup>nd</sup> Edition](#) (August 2010)  
[The World Market for Steam Flow Measurement](#) (March 2008)  
[The World Market for Ultrasonic Flowmeters, 3<sup>rd</sup> Edition](#) (January 2008)  
[The World Market for Thermal Flowmeters](#) (October 2009)  
[The World Market for Turbine Flowmeters, 2<sup>nd</sup> Edition](#) (Q3 2010)  
[The World Market for Positive Displacement Flowmeters, 2<sup>nd</sup> Edition](#) (Q4 2010)  
[The World Market for Pressure Transmitters, 2<sup>nd</sup> Edition](#) (October 2007)  
[The World Market for DP Flowmeters and Primary Elements](#) (January 2007)  
[The Global Market for Magnetic Flowmeters, 4<sup>th</sup> Edition](#) (May 2009)  
[Worldwide Survey of Flowmeter Users, 2<sup>nd</sup> Edition](#) (January 2006)  
[The World Market for Vortex Flowmeters, 4<sup>th</sup> Edition](#) (June 2010)

These studies are described at <http://www.flowresearch.com/flow.htm>

Dr. Yoder has also written more than 110 articles on flow and instrumentation for trade journals. Links to many of these can be found at <http://www.flowresearch.com/articles.htm>.

Norm Weeks, Market Analyst, joined Flow Research in November 2004 after a 24-year stint with Verizon. At Verizon, Norm specialized in creating innovative customer solutions, product management, and product marketing. He is now a fulltime market analyst for Flow Research, has completed several studies, and regularly contributes articles and editorial assistance to our [Market Barometer](#) and [Energy Monitor](#) publications.

Belinda Burum, Vice President and Editor, has worked in high tech for 16 years as a technical writer and marketing communications manager. She joined the company in 2002, and has since then worked on many projects. She has a strong customer focus. In addition to her work on market studies, Belinda is serving as associate editor of the [Market Barometer](#) and the [Energy Monitor](#).

Besides writing and publishing studies of this type, Flow Research specializes in user surveys that include a detailed analysis of customer perceptions. In addition, Flow Research provides quarterly updates on the flow and energy industries in the [Market Barometer](#) and the [Energy Monitor](#). The [Energy Monitor](#) analyzes the current state of the oil & gas, refining, power, and renewables industries, and the implications for instrumentation supplier. Both reports are part of the [Worldflow Monitoring Service](#); more details are available at [www.worldflow.com](http://www.worldflow.com). For more information on Flow Research, please visit our website at [www.flowresearch.com](http://www.flowresearch.com).



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*Blaise Pascal*

## **The Flow Research *Founding Sponsor Program***

To produce studies that most closely match our clients' needs, Flow Research instituted the Founding Sponsor Program. This program enables companies who wish to participate at a high level in a study's research to influence its scope and segmentation. In addition, Founding Sponsors receive regular updates from Flow Research on study progress, and receive a significant discount on the regular price of the study.

Procedure: Early in the planning phase of a study, Founding Sponsors receive a proposal that includes the proposed segmentation. Founding Sponsors can propose additional segmentation, and can also suggest changes to the proposed segmentation. While the decision to adopt particular segmentation ultimately lies with Flow Research, and is based on input from all contributors, we will do our best to accommodate the specific needs of each of our clients.

During the research phase of a study, Flow Research will issue regular reports that provide updates on the progress of the research. These reports will be sent to Founding Sponsors, who are then invited to provide any additional input or comments into the study.

Being a Founding Sponsor requires making an early commitment to purchase the study. However, in return, Founding Sponsors receive a significant discount off the regular price of the study. Payment can be made 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 additional details, or to find out how the Founding Sponsor program applies to any particular study, please contact Flow Research. We look forward to working with you!

If you have any questions about the Founding Sponsor program, please contact Norm Weeks at (781) 245-3200, or [norm@flowresearch.com](mailto:norm@flowresearch.com).

## Featuring Three Add-On Modules

**Our new gas flowmeter study will also feature three add-on modules that will provide more in-depth information on end-user markets and on custody transfer.**

**Module A: Natural Gas Producers Worldwide** - Module A is mainly oriented towards companies that want to enhance their instrumentation sales worldwide to the larger producers of natural gas. It will include company profiles of the large producers, strategies for marketing to them, and a discussion of trends in flow measurement relative to these large companies.

This module will feature profiles of many of the leading producers and distributors of natural gas worldwide. The following are some of the many natural gas producers covered in this module:

- Aramco National Iranian Oil Co.
- Abu Dhabi National Oil Co. (UAE)
- BP Corporation
- Chevron
- China National Petroleum Corp.
- ConocoPhillips
- Egyptian General Petroleum Corp.
- ExxonMobil
- Gazprom (Russia)
- Iraq National Oil Co.
- Kuwait Petroleum Corp.
- National Oil Company (Libya)
- Nigerian National Petroleum Corp.
- PetroChina
- Petroleum Development Oman
- PDVSA (Venezuela)
- PETRONAS (Malaysia)
- Royal Dutch/Shell
- Qatar General Petroleum Corp.
- Saudi Aramco
- Statoil (Norway)
- Total (France)

This module will also describe the relationships among these companies and strategies for marketing to them.



**Module B: Natural Gas Producers in the Middle East** - Module B will include profiles of natural gas producers in the Middle East, and will be oriented towards instrumentation companies that want to increase their sales to the Middle East.

This module is based on extensive research done on oil and gas companies in the Middle East. In the second half of 2009, Flow Research did onsite interviews with 15 natural gas producers in the Middle East. Companies interviewed were in the United Arab Emirates (UAE), Saudi Arabia, Qatar, and Oman. The purpose of these interviews was to better understand gas flow

measurement trends in this region. We asked companies what kinds of flowmeters they are using and what their expectations are for the future. The result provides a very clear picture of flowmeter usage in the Middle East. The following are some of the many companies that will be included in Module B:

- Abu Dhabi National Oil Co. (UAE)
- Dolphin Energy (UAE, Qatar)
- Dubai Petroleum Company (UAE)
- Dubai Supply Authority (UAE)
- Egyptian General Petroleum Corp. (Egypt)
- GASCO (UAE)
- Ibn Zahr (Saudi Arabia)
- Iraq National Oil Company (Iraq)
- Kuwait Petroleum Corp, (Kuwait)
- National Industrial Gases Co. (Saudi Arabia)
- National Oil Company (Libya)
- Oman Gas Company (Oman)
- Petrokemya (Saudi Arabia)
- Petroleum Development Oman (Oman)
- Qatargas Operating Company (Qatar)
- RasGas (Qatar)
- SABIC (Saudi Arabia)
- SADAF (Saudi Arabia)
- Saudi Aramco
- S-Chem, Chevron (Saudi Arabia)
- Sonatrach (Algeria)

**Module C: The World Market for Custody Transfer of Natural Gas** - Module C will focus specifically on the market for custody transfer of natural gas, which is the fastest-growing niche within the flowmeter market. It will contain market data on ultrasonic, turbine, and differential pressure (DP) flowmeters used for custody transfer applications, and will discuss strategies for selling into this market.



Much of the growth in this market has been due to growth in the use of ultrasonic flowmeters for custody transfer applications. Thus growth has been spurred by the publication of AGA-9 by the American Gas Association (AGA) in 1998. AGA-9 lays out criteria for buyers and sellers of natural gas to follow when using ultrasonic flowmeters for custody transfer of natural gas. Module C compares the use of DP, turbine, and ultrasonic flowmeters for custody transfer of natural gas,

and projects the growth in these technologies through 2014.

Modules A, B, and C can be ordered as add-ons to the gas flow study, or as standalone reports. These additional modules will provide a great deal of in-depth research that will complement and build on the results of the gas flow study. You can find more details at [www.gasflows.com](http://www.gasflows.com).

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*Above: Oman Gas Company  
Photo by Flow Research*



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## Why Flow Research?

- We specialize in flowmeter markets and technologies
- We have researched all flowmeter types
- We have interviewed gas flow end-users onsite in many countries
- We have more than ten years of historical data on the gas flow measurement market
- We follow the flowmeter and energy markets on a quarterly basis through our *Market Barometer* and *Energy Monitor*