



The World Market for Gas Flow Measurement, 2nd Edition

Overview



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An Overview of a Market Research Study on The Worldwide Gas Flow Measurement Market

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 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, and to identify market growth sectors
- 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). 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.

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.

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 proposed basic research segmentations are 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

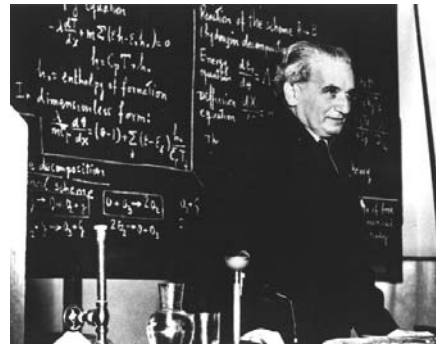
And more

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



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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.