Gas Metering Report Ed 2 2017
From 1st to 3rd Generation of Meter

Installed Base and Demand for Meters
Diaphragm, Ultrasonic, Smart Meters
Intelligent Safety Meters
Residential, C&I Meters
Smart Meters
Future Trends
The Growth of the Gas Industry
Natural Gas, City Gas, LPG

♦ This report describes the gas meter market and analyses the variety of gas supply systems which drive metering.

♦ The market for gas meters is quantified for each gas consuming country, demand for meters is analysed in number of units and $ value, by category of gas meter; residential, AMR, AMI, PPM, C&I, smart meters.

♦ 2016 is the base year, with forecasts from 2017 to 2021.

♦ The major trends are described in terms of technology and market development, with detailed reviews of the countries and technologies leading the industry.

♦ We go further than market statistics for meters. Marketers need statistics about gas meters, but for a comprehensive understanding of the industry and of the market, we believe that they need to understand how it has developed, how it has reached its current stage and how this will lead to the future.

♦ The gas industry has experienced fundamental changes in the last decades: new feedstocks, geographical expansion, the creation of a transport system. These have led to a huge growth in the industry, changes in the way it operates and the need for new ways of metering.
The report analyses the gas meter market population in 2016;

- **Numbers of piped gas consumers**
- **Annual demand for gas meters in units and value for every gas consuming country.**
- **With 2016 as base year, sales are forecast from 2017 to 2021, analysed by meter type.**

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The first chapter of marketing data starts with tables for 10 regions of the world, and 53 countries, accounting for 98% of global gas consumption and 96% of gas meter sales. These tables summarise the population of gas consumers and global demand for gas meters in units and $ value.

**GAS METER MARKET—COUNTRY REVIEWS**

Each regional and country section contains market reviews with:

- **A summary of the gas supply industry, distribution and consumers**
- **Gas meters sales in base year 2016 with forecasts from 2017 to 2021 in numbers of units, $ sales and average selling price per meter** - for Residential, AMR, AMI, PPM, Commercial and Industrial, and Smart Meters
- **Status and commentary on Ultrasonic Meters and Smart Metering**
- **Gas meter vendors**

Expanded market commentary for the United States, Japan, China and India.

- **Special Reviews of smart metering for France, Ireland, Italy, Netherlands, the United Kingdom, Japan and the United States**

*183 page, 78 figures, 116 tables*
## 1. The Gas Meter Market

### SALES FORECASTS IN METER UNITS AND $ VALUE BY METER TYPE, 2016-2021

The core of this report is contained in the series of tables below, which provide the composition of meter sales in numbers of meters, value and average selling price per meter.

63 tables for 10 regions and 53 countries, representing 96% of gas meter sales

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2. Gas Metering and the Gas Supply Industry

♦ This report describes the evolution of gas metering and the gas supply industry which supports it, from start to the present day, and projects the future of gas meter technology and demand.

- Diaphragm meters ➔ Ultrasonic Meters ➔ Earthquake and Catastrophe Protection ➔ Smart meters

Historically the demand for gas meters, like demand for electricity and water meters, followed a stable long-term path. It grew steadily as gas penetration increased, first for city coal gas and then for natural gas. There have been cyclical variations of this pattern caused by periods of low new installations and replacements, mainly due to wars or to economic circumstances. This pattern is changing in several ways. Networks and meter vendors need to understand how this change is coming about and how to predict the future cycles of demand, where and when they will be. The market is changing and there will be large variations in the demand cycles from country to country.

♦ These changes and variations are explained and charted in the report.

We believe that it is important to understand the past development of the metering industry. Piped gas is not a new industry and much of today’s equipment and practice derives from long experience. The distribution of manufactured city gas was already well established in many countries before natural gas became a widely used fuel outside the United States during the last fifty years.

♦ This progression is charted, leading to today’s world stock of nearly 500 million gas meters, mostly mechanical diaphragm meters. The average life of a diaphragm gas meter is 35 to 45 years, sometimes even more and it is necessary to survey a long period of time with historical data to establish the long-term demand trends.

♦ The old certainties are on the move. Ultrasonic meters with shorter lives are making their appearance and smart gas metering is being deployed in selected countries.

This will fundamentally change the demand cycle of replacement. But the changes are not universal. The business cases for smart metering differ from market to market and many countries are retaining their traditional mechanical meters and practices.

♦ The report identifies the new gas consuming countries where the demand cycle is being established for the first time or is going to change because of a change in meter technology.

These markets are limited in number today but they will increase in the future. Vendors need to plot these trends to plan production capacity efficiently, and to do this on an ongoing basis. The electro-technical industry has been plagued by a cycle of shortage and surplus of production capacity. Unless meter vendors monitor the demand cycles, production capacity will become more erratic, costs will rise and fall unpredictably, and profits will suffer.

♦ This report will enable vendors to plan to safeguard their futures and seize opportunities.
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