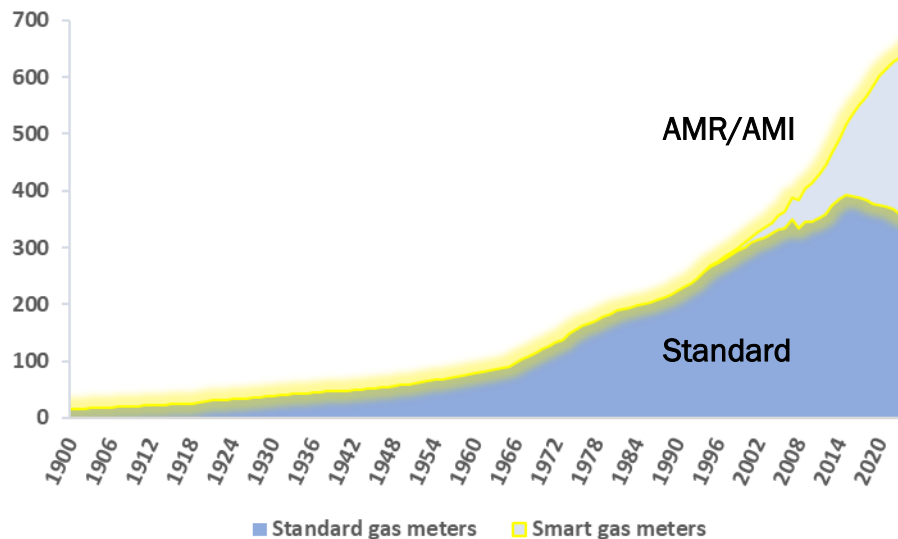


Gas Meters Smart & Standard Ed 4 2021



Smart gas metering is gaining momentum, with expansion of the Chinese natural gas market, European rollouts accelerating and the US continuing to convert to AMR and AMI metering. Nationwide stocks of diaphragm meters are being converted by replacements with smart meters, or with the addition of communication modules to the existing well-tested diaphragm and rotary meters. The report charts these developments over a ten-year time frame from 2015 and forecast to 2025.

The market is split by residential, standard and AMR/AMI, PPM, communication modules, C&I and grid meters And analysed by country.

- ◆ Global gas meter demand is forecast in units and value, totals of all meters and smart meters, from base year 2015 to 2025 in the countries with piped gas networks and over 600,000 gas customers.
- ◆ Analysis of sales of gas meters for 43 countries, by meter type - Basic Residential, AMR/AMI, Prepayment, Communications Modules, C&I - units, value, and average selling price, from 2019 to 2025. Tables of the global total, regional totals and countries.
- ◆ The major meter technologies are described with total market shares; diaphragm, rotary, turbine, orifice and ultrasonic, plus outline of Coriolis, vortex and MEMS meters.
- ◆ The major customers for gas meters, the gas transmission and distribution utilities, are outlined in each of the 43 countries profiled, together with their structure.
- ◆ The number of housing units, residential and commercial gas customers with piped gas are charted for each profiled country, from 1900 to 2020.

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- ◆ At the city gate station gas pressure is high, grid and bulk meters need to be robust and highly accurate. Commercial & Industrial (C&I) meters contributed only 1% of meter sales in units in 2019, but this important segment of high value meters was worth \$1 billion.
- ◆ Global market shares are accompanied with profiles of the meter manufacturers, including those with small shares in numbers of meters but leading positions in high end meters for high pressure measurement - Elster, Itron, Landis+Gyr, Dresser, Diehl, Apator, Sagemcom, Sensus, Dongfa Group, Holley, Emerson.
- ◆ Fundamental changes in the demand cycle for meters are taking place in the residential segment. Meter vendors need to understand the new trends to plan their footprint and to avoid mismatch, over-capacity and pressure on profits. Historically the demand for gas meters followed a stable long-term path, driven by the increase of gas penetration, first for city coal gas and then for natural gas. The country-wide deployments of smart meters now starting, involve replacing the entire stock of residential meters with 20 year lives, in a short period of perhaps 5 years. This has never happened before and it means that there will be peaks of replacement and troughs of low demand.
- ◆ The NGV and Autogas segment is reviewed, a small but growing segment for gas meters, with numbers and metering technology.
- ◆ Gas metering cannot be fully understood in isolation. It is not all piped natural gas. Market-ers need to understand the gas supply industry, how it has developed and where it will go in the future. The industry is described, from its start with local town gas to the international natural gas industry today, piped and LNG. There are still other pockets of gas; town gas, LPG both piped and in cylinders and local tanks of natural gas.

Two sets of tables contain the core data of the report

THE GLOBAL PIPED GAS METERING LANDSCAPE 2019/20

	Population	Households	Piped gas consumers	Demand for meters	Demand for meters
	Million	Million	Thousand	Thousand	\$ million
Global					
10 regions					
71 countries					

213 pages, 78 figures and 118 tables, 3 illustration.

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The Gas Meter Market

SALES FORECASTS IN METER UNITS AND \$ VALUE BY METER TYPE, 2019-2025

The series of tables below provide the composition of meter sales in numbers of meters, value and average selling price per meter.

63 tables for 7 regions and 43 countries, representing 97% of gas meter sales

	2019	2020	2021	2022	2023	2024	2025
'000 meters							
Residential							
PPM							
AMI							
Industrial & grid							
Total meters							
\$ million							
Residential							
PPM							
AMI							
Industrial & grid							
Total value							
Average selling price \$							
Residential							
PPM							
AMI							
Industrial & grid							

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