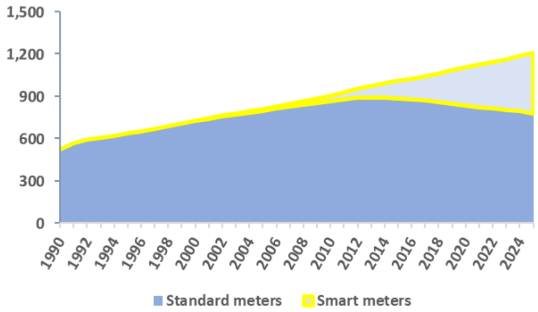
Water Meters Smart & Standard Ed 3 2021



AMI and AMR Water Meters
Standard Residential Meters, Sub Meters
Commercial Meters, Industrial Meters,
Custodial Transfer Meters, Non-custodial Network Management Meters
Digitisation, Blockchain
Competitive analysis

Smart water meters, both AMI and AMR, after a slow start are taking off in the water sector. The smart share in total revenue has increased from 28.2% in 2012 to 46.7% in 2020. The share of C&I and bulk meters has decreased from 36.4% to 26.7%. This does not mean that the C&I segment is in decline, the value has grown by 13.8% during the same period. The report plots these trends with market commentary.

- *Smart water meter market deployments listed.*
- *The water meter market is analysed by meter type with base year 2019 and forecast to 2025 by country by these categories of water meter, in nits nd $ value.*

  - AMI meters
  - AMR meters
  - Standard Residential Billing 15-25 mm meters
  - Prepayment meters
  - Sub meters.
  - Apartment/Small Commercial Building meters........... > 25-50 mm.
  - ICI Industrial Commercial Institutional meters ....5-100 mm.
  - Bulk Transfer/Custody Transfer meters......................... ≥ 300 mm.
  - Network Management (Non-custodial) meters................ ≥ 300 mm.

- European residential meter practices shown by country: volumetric/velocimetric meters, meter class A to D.
- Analysis of the impact of Covid on the meter market., with a detailed resume of the pandemic by country and wave.

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- Smart water metering is taking off, driven by water shortage and leakage detection, which costs the global industry $39 billion a year in lost revenue. Customer billing & service, detection of pipe faults, asset management and modelling are also important drivers.
- The growth, composition and legal status of the water supply industries of the major countries outlined. (including small countries with national smart rollouts).
  - **Europe** - France, Germany, Ireland, Italy, Malta, Netherlands, Poland, Spain, Turkey, United Kingdom
  - **CIS** - Russia, Ukraine
  - **Middle East & Africa** - Algeria, Egypt, Morocco, Tunisia, South Africa
  - **Asia Pacific** - Australia, China, India, Indonesia, Japan, Korea, Malaysia, Philippines, Taiwan, Thailand
  - **North America** - United States, Canada
  - **Central America** - Mexico
  - **South America** - Argentina, Brazil
- Sub-metering is growing in importance - countries, legislation, metering services, vendors.
- Digitisation and blockchain offer game changing advances in the ability to control resources, manage utility businesses and operate smart networks.
- Profiles and market shares of the leading water meter vendors, : Elster, Itron, Sensus, Badger, Arad, Neptune, Diehl, Aclara.
- Profiles of sub meter service companies: Techem, ista, Minol Brunata Zenner.
- AMI/AMR vendor technologies profiled: Aclara Star AMI Technology, Sensus FlexNet AMI Technology, Badger Beacon Automated Metering Analytics, Mueller MiNet AMI System, Elster Falcon PR^ and PR& Registers, Itron Choice Connect AMI, Neptune R450 TW AMI, Arad Group Dialog 3G, Kamstrup AMI.
- With many small players, the water supply industry is fragmented, conservative and risk averse. The utilities have been slow to embrace new technology. Smart metering is making most progress in countries with large utilities or management contractors to invest in technology. The different country scenarios are outlined.
- Demand drivers in the water meter market are a combination of ever expanding water connections, commercial pressures, water depletion and growing demand for water, flooding and drought, industrial growth and improving living conditions, and growing awareness of water management. These are driving wider metering coverage and smart metering.

299 pages, 204 tables, 24 figures

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