Global Prospects for Metering and Advanced Metering Infrastructure

Description: A key new market driver has emerged. With the exception of Germany, policy makers and utilities alike believe they need to invest in smart metering because everyone else is doing so. It is forecast that this most powerful of drivers will push residential electricity smart meter shipments to 60 million units in 2015, compared to 15 million units shipped in 2009.

Scope of this research:
- The report provides market size (Units and $m) forecasts of the following for 45 countries:
  - Residential electricity meter sales by technology (electro-mechanical, electronic, pre-payment, AMR, AMI), 2005-15
  - Commercial, Industrial and Grid electricity meter sales, 2005-15
  - Gas, Water and Heat electricity meter sales, 2005-15

Research and analysis highlights:
- Detailed profiles on the key global markets for smart metering including the USA, Canada, Mexico, Brazil, France, Germany, the Netherlands, Spain, the UK, Denmark, Finland, the Czech Republic, Poland, Hungary, Russia, South Africa, India, China and Australia
- The global value of the smart metering market for residential customers will reach $5.7bn by 2015 up from $1.6bn in 2009, including both smart meters and attendant infrastructure such as communication modules, data concentrators, home-side gateways, utility-side MUCs, HAN cards, in-home devices, smart thermostats and meter data management software.

Key reasons to purchase this research:
- The most comprehensive report ever compiled on smart metering
- Detailed profiles on the key global markets for smart metering, and detailed data and forecasts for a further 26 countries
- Vendor market shares for smart meters and communications modules by region

Contents:
SUMMARY
Key conclusions
How to use this report
Introduction to the report
Report definitions
The world market for metering
The vendor landscape
Only around 50% of an AMI budget will go to vendors
Meter manufacturers
Communications vendors
MDM
Systems Integrators
Meter vendor market shares

Smart metering
Key applications for smart metering
Key drivers for smart metering
Key issues for smart metering

North America

Canada
Conclusions: Ontario will provide valuable lessons for the rest of Canada
Utility sector: Canada has partially restructured its utility sector
Metering: Ontario has begun to roll out smart metering
USA
Conclusions: Stimulus funds and positive regulators have driven rapid US market growth
Utility sector: Investor-owned utilities dominate the US utility sector
Metering: AMI using RF dominates the US metering sector

Mexico
Conclusions: Mexico is a strong opportunity for smart metering vendors
Utility sector: CFE and Luz y Fuerza del Centro are the key electric utilities in Mexico
Metering: Mexico will switch from electro-mechanical to electronic metering

South America
Brazil
Conclusions: Brazil represents a substantial opportunity
Utility sector: Brazil has restructured its electricity sector
Metering: Brazil has a number of local meter vendors

Western Europe
France
Conclusions: We expect the French roll out for smart metering will start in 2012
Utility sector: EDF dominates the French electricity industry
Metering: France has a significant metering sector across all utilities

Germany
Conclusions: Germany is large but uncertain prize for smart metering vendors
Utility sector: Germany is Europe's most complex utility sector
Metering: Germany has a liberalised metering sector

Netherlands
Conclusions: We expect the Dutch smart metering programme to be complete by 2020
Utility sector: Retail-distribution unbundling is nearly complete
Metering: DNOs have the responsibility for metering

Spain
Conclusions: Spain will deliver smart metering although with delays
Utility sector: Endesa and Iberdrola are Spain's key electric utilities
Metering: Electricity and water meters dominate the Spanish market

UK
Conclusions: The UK is looking to accelerate its smart metering roll out
Utility sector: The UK is the most liberalised of Europe's energy markets
Metering: The metering segment is fully liberalised in the UK market

Nordic markets
Denmark
Conclusions: DONG is the major remaining opportunity in Denmark
Utility sector: DONG is by far the largest utility in Denmark
Metering: Metering is the responsibility of the DNO in Denmark

Finland
Conclusions: Finland will complete its smart metering roll out by 2013
Utility sector: Finland has a highly fragmented utility sector
Metering: Metering is the responsibility of the DNO in Finland

Eastern Europe
Czech Republic
Conclusions: PLC set to dominate in the Czech Republic
Utility sector: retail competition has yet to bite in the Czech Republic
Metering: The Czech metering sector cover all utilities
Hungary
Conclusions: Pilot projects will determine whether smart metering will be multi-utility
Utility sector: Hungary has restructured and privatised its utility sector
Metering: Metering is the responsibility of the DNO in Hungary

Poland
Conclusions: Poland is a key target for smart metering vendors
Utility sector: Liberalisation has yet to spur meaningful retail competition
Metering: Poland's electricity metering market is fully electronic
Former soviet union

Russia
Conclusions: Russia is a major opportunity for smart metering vendors
Utility sector: Russia has comprehensively restructured its electricity system
Metering: Russia's local players have the largest market share

Middle East

Africa

South Africa
Conclusions: We expect South Africa to install smart meters for larger customers
Utility sector: Eskom manages most of South Africa's electrical system
Metering: South Africa is the world's largest pre-payment meter market

Asia Pacific

Australia
Conclusions: Managing Australia's peak load is the key driver for smart metering
Utility sector: Australia has a fragmented retail market
Metering: A smart metering roll out is underway in Victoria

China
Conclusions: Even local manufacturers are struggling to make a profit
Utility sector: SGCC and SCG are the major DNOs in China
Metering: China has a large installed base of electricity and water meters

India
Conclusions: We expect AMI shipments to begin in earnest in 2011
Utility sector: India's power sector is someway behind its BRIC counterparts
Metering: India has moved away from electro-mechanical metering

Data appendix
Argentina
Japan
South Korea
Austria
Belgium
Bulgaria
Estonia
Greece
Ireland
Latvia
Lithuania
Norway
Portugal
Romania
Slovakia
Slovenia
Switzerland
Turkey
United Arab Emirates
Israel
Ukraine
Kazakhstan
Uzbekistan

Methodology
Overall methodology
Calculating market size, segments and market value
Market shares
Market forecasts

LIST OF TABLES
Table 1: Size (Units) of the global metering market, 2004-2009
Table 2: Value ($m) of the global metering market, 2004-2009
Table 3: Forecast size (Units) of the global metering market, 2010-2015
Table 4: Forecast value ($m) of the global metering market, 2010-15
Table 5: Global residential smart metering forecast by technology, 2008-2015
Table 6: Global residential smart metering forecast (value) by technology, 2008-2015
Table 7: Meter manufacturers are leading the expansion up the AMI value chain
Table 8: Few communications specialists have expanded their product portfolios
Table 9: Meter data management vendors have not ventured into AMI hardware
Table 10: Few systems integrators have developed AMI solutions
Table 11: AMI* residential meter market shares by region, 2009
Table 12: AMI* residential communications market shares by region, 2009
Table 13: AMI* residential value market shares for North America split between meters and communications, 2009
Table 14: Global residential electricity meter market shares (Units), 2009
Table 15: Residential electricity meter market shares (Units) in North America, 2009
Table 16: Residential electricity meter market shares (Units) in South America, 2009
Table 17: Residential electricity meter market shares (Units) in EMEA, 2009
Table 18: Residential electricity meter market shares (Units) in Asia Pacific, 2009
Table 19: Global ICG electricity meter market shares (Units), 2009
Table 20: ICG electricity meter market shares (Units) in North America, 2009
Table 21: ICG electricity meter market shares (Units) in South America, 2009
Table 22: ICG electricity meter market shares (Units) in EMEA, 2009
Table 23: ICG electricity meter market shares (Units) in Asia Pacific, 2009
Table 24: Size (Units) of the metering market in North America, 2004-2009
Table 25: Value ($m) of the metering market in North America, 2004-2009
Table 26: Forecast size (Units) of the metering market in North America, 2010-2015
Table 27: Forecast value ($m) of the metering market in North America, 2010-15
Table 28: North America residential smart metering forecast by technology, 2008-2015
Table 29: North America residential smart metering forecast (value) by technology, 2008-2015
Table 30: AMI* residential value market shares for North America split between meters and communications, 2009
Table 31: Largest DNOs in Canada by State, 2009
Table 32: Size (Units) of the metering market in Canada, 2004-2009
Table 33: Value ($m) of the metering market in Canada, 2004-2009
Table 34: Forecast size (Units) of the metering market in Canada, 2010-2015
Table 35: Forecast value ($m) of the metering market in Canada, 2010-15
Table 36: Forecast volume (units) of the smart metering market in Canada, 2008-2015
Table 37: Forecast value ($m) of the smart metering market in Canada, 2008-2015
Table 38: Electric meter points installed by utility type in the USA, 2008
Table 39: Key competitors in the US smart metering sector and their scope of business
Table 40: Size (Units) of the metering market in the USA, 2004-2009
Table 41: Value ($m) of the metering market in the USA, 2004-2009
Table 42: Forecast size (Units) of the metering market in the USA, 2010-2015
Table 43: Forecast value ($m) of the metering market in the USA, 2010-15
Table 44: Smart metering status of US electric DNOs with 1m+ installed domestic and commercial meters, 2009
Table 45: Electric utilities in the US that have yet to award AMI projects and our forecast deployment schedule by regulated entity
Table 46: Electric utilities in the US that have yet to award AMI projects and our forecast deployment schedule by regulated entity (Cont'd)
Table 47: Forecast volume (units) of the smart metering market in the USA, 2008-2015
Table 48: Forecast value ($m) of the smart metering market in the USA, 2008-2015
Table 49: Size (Units) of the metering market in Mexico, 2004-2009
Table 50: Value ($m) of the metering market in Mexico, 2004-2009
Table 51: Forecast size (Units) of the metering market in Mexico, 2010-2015
Table 52: Forecast value ($m) of the metering market in Mexico, 2010-15
Table 53: Forecast volume (units) of the smart metering market in Mexico, 2008-2015
Table 54: Forecast value ($m) of the smart metering market in Mexico, 2008-2015
Table 55: Size (Units) of the metering market in South America, 2004-2009
Table 56: Value ($m) of the metering market in South America, 2004-2009
Table 57: Forecast size (Units) of the metering market in South America, 2010-2015
Table 58: Forecast value ($m) of the metering market in South America, 2010-15
Table 59: Size (Units) of the metering market in Brazil, 2004-2009
Table 60: Value ($m) of the metering market in Brazil, 2004-2009
Table 61: Forecast size (Units) of the metering market in Brazil, 2010-2015
Table 62: Forecast value ($m) of the metering market in Brazil, 2010-15
Table 63: Forecast volume (units) of the smart metering market in Brazil, 2008-2015
Table 64: Forecast value ($m) of the smart metering market in Brazil, 2008-2015
Table 65: Size (Units) of the metering market in Western Europe, 2004-2009
Table 66: Value ($m) of the metering market in Western Europe, 2004-2009
Table 67: Forecast size (Units) of the metering market in Western Europe, 2010-2015
Table 68: Forecast value ($m) of the metering market in Western Europe, 2010-15
Table 69: Residential electricity AMI meter shipments in Western Europe, 2004-09
Table 70: Forecast residential electricity AMI meter shipments in Western Europe, 2010-15
Table 71: Western Europe residential smart metering forecast by technology, 2008-2015
Table 72: Western Europe residential smart metering forecast (value) by technology, 2008-2015
Table 73: Size (Units) of the metering market France, 2004-2009
Table 74: Value ($m) of the metering market in France, 2004-2009
Table 75: Forecast size (Units) of the metering market in France, 2010-2015
Table 76: Forecast value ($m) of the metering market France, 2010-15
Table 77: Forecast volume (units) of the smart metering market in France, 2008-2015
Table 78: Forecast value ($m) of the smart metering market in France, 2008-2015
Table 79: Size (Units) of the metering market Germany, 2004-2009
Table 80: Value ($m) of the metering market in Germany, 2004-2009
Table 81: Forecast size (Units) of the metering market in Germany, 2010-2015
Table 82: Forecast value ($m) of the metering market Germany, 2010-15
Table 83: Smart metering topologies under consideration in Germany
Table 84: Forecast volume (units) of the smart metering market in Germany, 2008-2015
Table 85: Forecast value ($m) of the smart metering market in Germany, 2008-2015
Table 86: Size (Units) of the metering market in the Netherlands, 2004-2009
Table 87: Value ($m) of the metering market in the Netherlands, 2004-2009

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