Gas Meters: Global Market Forecast and Trends 2013 – 2050

Description:

The fast moving global gas meter market is currently worth $2.49 billion annually and we forecast that by 2018 annual demand value will have increased by 13.2% to $2.82 billion. But the growth is far from being about smart meters, the case for which is not as compelling as for electricity. In our report, we analyse the market globally, regionally and by major territories to produce detailed assessments of current and future market size by volume and value, by type of meter.

Global growth is principally reliant on China, which will continue its gasification progress from a relatively low base, and Russia, with continued expansion of the extensive gas network and more importantly, increasing the use of household meters. For the international metering industry these two markets present big challenges as they are very largely supplied by domestic manufacturers, with mainly large bulk and specialised gas meters being imported.

In Europe and North America there will be some growth in gas coverage in varying degrees. Some countries have reached saturation, notably Netherlands (95% coverage), Italy (90%) and UK (82%) and demand in these markets is driven by replacement need if no smart meter option has developed. Other markets present opportunities for increased coverage, such as Russia (63% coverage) and the USA (50%) plus some other smaller economies. There will also be opportunities for conversion from LPG to natural gas notably in Japan and Mexico.

The business case for gas smart metering is less attractive than for electricity. There has been a fairly substantial growth in smart gas metering in the US, mainly with the addition of communication modules attached to existing diaphragm meters. Otherwise, with some exceptions, the gas metering market will not see a move into smart metering at anything like the pace predicted for electricity, which itself is turning out to be slower than originally expected.

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