Smart Water Meters - Global Strategic Analysis

Description: This report analyzes the worldwide markets for Smart Water Meters in US$ Thousand. The report provides separate comprehensive analytics for the US, Canada, Japan, Europe, Asia-Pacific, and Rest of World.

Annual estimates and forecasts are provided for the period 2013 through 2020. Market data and analytics are derived from primary and secondary research. Company profiles are primarily based on public domain information including company URLs.

The report profiles 67 companies including many key and niche players such as:

- Aclara Technologies LLC
- Aquiba Pty Ltd.
- Arad Group
- Badger Meter, Inc.
- Cyan Holdings PLC

Contents:

I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS
  Study Reliability and Reporting Limitations
  Disclaimers
  Data Interpretation & Reporting Level
  Quantitative Techniques & Analytics
  Product Definition and Scope of Study

II. EXECUTIVE SUMMARY

1. INDUSTRY OVERVIEW
   Smart Water Meters: Enabling Water Utilities to be Energy-Efficient, Engaged, Responsive, and Resilient
   Growth Drivers in a Nutshell
   Critical Risk Factors to be Addressed Prior to Smart Water Meters Deployment
   Mounting Economic and Environment Challenges Drives the Need for Smart Water Networks
   Table 1: Global Water Utility Expenditure by Type (2015): Percentage Breakdown of Capital Expenditure and Operational Expenditures for Each Cost Component (includes corresponding Graph/Chart)
   The Evolution of the Smart Water Grid: Foundation for Market Penetration
   Myriad Benefits of Smart Water Meters Drive Global Adoption
   Reduction in Non-Revenue Water (NRW) Losses
   Enhanced Operational Efficiency
   Improved Asset Management
   Provision of Actionable Intelligence
   Enabling Modernization of Aging Infrastructure
   Improved Customer Relationships
   Global Market Outlook
   North America and Europe Dominate the Smart Water Meter Market
   Emerging Economies, Led by Asia and Latin America, to Erode North American Market Share
   Competitive Landscape
   Itron Leads the Global Water Metering Technologies Market
   Table 2: Leading Water Meters Companies Worldwide (2014): Market Share Breakdown for Diehl Metering, Elster, Itron, Jiangxi Sanchuan, Ningbo Sanxing, Sensus, and Others (includes corresponding Graph/Chart)
   Managed AMI Services Offer Lucrative Modernization Options to Water Utilities
   Customized Marketing Strategies: The Need of the Hour for Building Awareness

2. MARKET TRENDS, ISSUES & DRIVERS
   Expanding Global Population and the Resulting Need for Smart Water Infrastructure: A Strong Growth Driver
   Table 3: Global Population Estimates (2000-2050) (includes corresponding Graph/Chart)
   Table 4: Total Population Worldwide by Urban and Rural Population in Thousands: 1950-2050P (includes corresponding Graph/Chart)
Rising Popularity of Smart Water Networks Boosts Demand for Smart Water Meters

Smart Water Network Attributes
- Automatic Leak Detection Capability
- Pre-specified Days for Outdoor Watering
- Watering Restrictions
- Novel Water Tariff
- Understanding Consumption Patterns
- Stringent Regulations by Water Bodies and Governments Strengthen Market Prospects

Growing Demand for Advanced Metering Infrastructure (AMI) Lends Traction to Market Growth

Table 5: Global Advanced Metering Infrastructure (AMI) Market (Annual Revenues in US$ Million) 2014E & 2018P (includes corresponding Graph/Chart)

Surging Demand from Water Utilities Worldwide Benefit Market Expansion

Internet of Things Poised to Revamp the Water Utilities Sector

Upcoming Smart Cities to Fuel Large-Scale Adoption of Smart Water Meters

Rising Need for Smart Water Meters in Agricultural Sector Offers Huge Untapped Market Potential

Key Challenges Hampering Widespread Adoption of Smart Water Management Solutions
- High Cost of Installation and Deployment
- Sceptics Question Actual Value Realized through Smart Water Networks
- Security and Reliability Concerns
- Reliance on Battery Power Instead of Mains Supply
- Slow Technological Advancement Limits Choice of Products
- Lack of Flexible Demand Management Programs for Water

3. SMART WATER METER INNOVATIONS & ADVANCEMENTS
Integration of Cellular Technology Takes Smart Water Meters to the Next Level
- Selecting a Suitable Cellular AMI Technology

Advantages of Water Meters with Cellular Connected Endpoints
- Informed Consumers
- Enhanced Water Management
- Improved Water Conservation
- Lower Operational Costs

Big Data Analytics: The Next Big Thing in Smart Water Networks
- Cloud Computing and SaaS to Revolutionize Management of Water Utilities
- Driblet: A Major Technology Breakthrough that Self-Generates Energy for Operation
- FLUID: An Intelligent Water Consumption Measuring Solution
- Aquai Puck: A Smartphone Connected Water Consumption Reader for Appliances
- An Informatics Architecture for Smart Meters
- Application of Ultrasonic Technology in Water Meters Gain Momentum
- Other Noteworthy Innovative and Advanced Smart Water Solutions
- T2 Virtual Network Solution from T2
- Smart Water Solutions from Neptune Technology Group
- Mueller Systems' Mobile App mobileRDM
- AmCoBi's AquaHawk Alerting Solution
- Badger Meter's Smart Water Meter Solutions
- Silver Spring Networks' IPv6 Network
- Dynamic Flow Technologies' Microwave-based Water Meter
- i2O Technology: Leveraging the IoT for Water Networks
- Valve-Controlled Wireless Intelligent Water Meter by Minsen
- Sensus and BAI Introduce SensusFlexNet Systems

4. PRODUCT OVERVIEW
Smart Meters
- Features of a Smart Meter
- Smart Meters vs. Conventional Meters
- Smart Meters vs. Automatic Meter Reading
Water Meters
- Types of Water Meters
- Reading a Meter: The Evolution of Wireless Sensor Networks
Smart Water Metering: A Prelude
- Structure of a Smart Water Metering System
- Meter Data Management Software
- Application Software
- Smart Endpoint
Supervisory Control and Data Acquisition (SCADA)
Advanced Metering Infrastructure (AMI)
Automated Meter Reading (AMR)
Smart Water Meters
Components of Smart Water Meters
Microcontroller Unit (MCU)
Meter Transceiver Unit (MXU)
Data Loggers
Radio Transmitters
Gateway
Classification of Smart Water Meters
Positive Displacement Meters
Velocity Meters
Fluidic Oscillator Water Meters
Ultrasonic Transit Time Water Meters
Electromagnetic Water Meters
Multi-Jet Water Meters
Single-Jet Water Meters

5. PRODUCT INTRODUCTIONS
Itron Unveils 4G LTE Smart Metering Solution
Arad Debuts SONATA Ultrasonic Residential Water Meter
Badger Meter Introduces E-Series Ultrasonic Meters
Kamstrup Introduces Smart Metering Solution
Badger Meter Launches BEACON® Advanced Metering Analytics Solution and Smart Water Solutions
Aclara Technologies Unveils STAR_prestige
Badger Meter Unveils BEACON Advanced Metering Analytics
Lamar County Electric to Integrate Aclara's eTWACS System with AMI for Electric, Water and Gas Utilities
Itron Launches Itron TOTAL AMI Solutions for Gas, Water and Power Applications
Mueller Systems Launches Mi.Echo 2-Way AMI System with Automatic Leak Detection
Itron Introduces Cellular AMI Solutions for Water Utilities in North America
Libelium Unveils Waspmote Smart Water Control Sensor Platform
Capstone Metering Selects Novatel Wireless for M2M Module of Cellular Smart Water Meters

6. RECENT INDUSTRY ACTIVITY
Honeywell Completes Acquisition of Elster Division from Melrose Industries
Trimble Takes Over Telog Instruments
Badger Meter Inks Agreement to Acquire Assets of United Utilities
Abbotsford BC Selects Innovyze's DemandAnalyst for Smart Water Network
Mueller Systems Enrolls Into LoRa™ Alliance
Sensus Commences Meter Manufacturing Plant in Fuzhou
United Water Selects Sensus for Deploying Smart Water Management Solution
Aeris Partners with Badger Meter for Smart Water Meter Deployment
Sensus Replaces Faulty iPerl Smart Water Meters in Chicago Glenview Suburb
Itron Inks Water Meter Supply Contract with Yorkshire Water
State of California Certifies Kamstrup flowIQ Smart Water Meter
Semtech Corporation, Mueller Systems, Senet to Set Up Low-Power WAN in Ventura County
City of Grand Prairie Selects Itron for Upgrading Metering, Customer Service Operations
City of Murfreesboro Selects Itron Smart Water Solutions
Itron Commences Project for Upgrading Water Meters in Jordan
The City of North Miami Beach Water Utility Partners Itron for Modernizing Water Distribution System
Apa Nova Bucuresti Selects Itron for Modernizing Water Metering System
Neptune Technology to Collaborate with Global Water Management for Connected Utility Partnership Program
Kamstrup and Itron Collaborate For Developing Smart Metering for Austrian Market
Echologics Sets Up Innovation Site for Testing "Smart" Leak Detection Solutions
City of Yonkers Partners with Mueller Systems for Modernizing Water Meter Infrastructure
The City of Kannapolis Selects Mueller Systems for Upgrading Water System
The Arad Group Acquires Controlling Stake Cicasa
Waternet Purchases Licenses of Innovyze's InfoWorks WS
The City of Le Mans Selects Arad Group's Octave Ultrasonic Bulk Water Meters
Bad Koenig Town Chooses Sensus iPERL Smart Water Meter System
Badger Meter Takes Over Aquacue
Itron Wins Contracts for Supplying Advanced Automated Meters in India
Thames Water Commences First Ever Smart Water Program in UK
Utility Partners of America Installs Smart Water Meters for Albuquerque Bernalillo County Water Utility Authority
Novatel Wireless Ships M2M Enabler HS 3001 Modules to Capstone Metering
Arad Group Wins Water Meter Contract from Delhi Jal Board
Arad Group Partners with IBM for Integrating Water Meter Solutions with Big Data
Sensus Delivers Millionth iPERL™ Residential Water Meter to City of O’Fallon

7. FOCUS ON SELECT PLAYERS
Aclara Technologies LLC (USA)
Aquiba Pty Ltd (Australia)
Arad Group (Israel)
Master Meter, Inc. (USA)
Badger Meter, Inc. (USA)
Cyan Holdings PLC (UK)
Datamatic, Inc. (USA)
Diehl Metering GmbH (Germany)
Elster Group GmbH (Germany)
Elster Water Metering (UK)
Iskraemeco (UK) Ltd. (UK)
Itron, Inc. (USA)
Jiangxi Sanchuan Water Meter (China)
Kamstrup (Denmark)
Mueller Systems LLC (USA)
Neptune Technology Group (USA)
Ningbo Water Meter Co., Ltd. (China)
Sensus (USA)
Suntrontech Co., Ltd (China)
Tantalus Systems Inc. (Canada)
Wasion Group Limited (China)
Zhejiang Holley Liyuan Metering Co., Ltd./ Holley Water Meter (China)

8. GLOBAL MARKET PERSPECTIVE
Table 6: Worldwide Recent Past, Current & Future Analysis for Smart Water Meters by Geographic Region
US, Canada, Japan, Europe, Asia-Pacific, and Rest of World Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 7: World 8-Year Perspective for Smart Water Meters by Geographic Region
Percentage Breakdown of Dollar Sales for US, Canada, Japan, Europe, Asia-Pacific, and Rest of World Markets for Years 2013, 2015 and 2020 (includes corresponding Graph/Chart)

III. MARKET
1. THE UNITED STATES
A. Market Analysis
Smart Water Meter Deployments Witness Healthy Growth in the US
Growing Demand for Advanced Metering Infrastructure Benefits Market Expansion
Transition towards Smart Technologies Benefits Smart Meter Adoption
Looming Water Shortage Drives Smart Water Meter Upgrades in the State of California
Growth of Cellular Enabled Smart Water Deployments in North America to Gain Traction
Key Challenges and Concerns Hampering Widespread Adoption of Smart Water Meters
Product Introductions
Strategic Corporate Developments
Select Key Players
B. Market Analytics
Table 8: US Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

2. CANADA
A. Market Analysis
Product Introductions
Strategic Corporate Developments
Tantalus Systems Inc.
A Major Canada-Based Company
B. Market Analytics
Table 9: Canadian Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

3. JAPAN
Market Analysis
Table 10: Japanese Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4. EUROPE
A. Market Analysis
European Smart Water Meter Market to Witness the Fastest Growth
Rising Deployments of Advanced Metering Infrastructure (AMI) Spurs Demand for Smart Water Meters
European Market Offers Significant Opportunities for Smart Meter Service Providers
B. Market Analytics
Table 11: European Recent Past, Current & Future Analysis for Smart Water Meters by Geographic Region France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets Independently Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)
Table 12: European 8-Year Perspective for Smart Water Meters by Geographic Region Percentage Breakdown of Dollar Sales for France, Germany, Italy, UK, Spain, Russia, and Rest of Europe Markets for Years 2013, 2015 and 2020 (includes corresponding Graph/Chart)

4a. FRANCE
A. Market Analysis
Current and Future Analysis
Strategic Corporate Development
B. Market Analytics
Table 13: French Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4b. GERMANY
A. Market Analysis
Current and Future Analysis
Strategic Corporate Development
Select Key Players
B. Market Analytics
Table 14: German Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4c. ITALY
A. Market Analysis
Current and Future Analysis
B. Market Analytics
Table 15: Italian Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4d. THE UNITED KINGDOM
A. Market Analysis
Current and Future Analysis
Government Supports UK Smart Meter Deployments
Strategic Corporate Developments
Select Key Players
B. Market Analytics
Table 16: UK Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4e. SPAIN
A. Market Analysis
Current and Future Analysis
Product Introduction
B. Market Analytics
Table 17: Spanish Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with
Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4f. RUSSIA
A. Market Analysis
   Current and Future Analysis
B. Market Analytics
Table 18: Russian Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

4g. REST OF EUROPE
A. Market Analysis
   Current and Future Analysis
   Overview of Select Markets
   Smart Water Meter Deployments Catching Pace in Ireland
   Malta, Italy and Greece Target Full-scale Roll Out of Smart Water Meters
   Debt Crisis Holds Back Iberia from Much Needed Smart Water Metering Implementation
   Product Introduction
   Strategic Corporate Development
   Select Key Player
B. Market Analytics
Table 19: Rest of Europe Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

5. ASIA-PACIFIC
A. Market Analysis
   Current and Future Analysis
   Emerging Asian Economies Offer Lucrative Growth Opportunities
   Asian Manufacturers Supply High-Quality & Low-Cost AMI Solutions
   Overview of Select Markets
   Australia
   Australian Water Utilities Embrace Smart Water Management Technologies
   Demand for SensusFlexNet Systems to Gain Traction in Australia
   China
   China Turns to Smart Water Infrastructure to Resolve Acute Water Scarcity
   Fast-Growing Chinese Smart Water Market Attracts Multinational Vendors
   Strategic Corporate Developments
   Select Key Players
B. Market Analytics
Table 20: Asia-Pacific Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

6. REST OF WORLD
A. Market Analysis
   Current and Future Analysis
   Latin American Smart Water Metering Market on the Rise
   Smart Water Deployment in South Africa Picks Up Pace
   Product Introduction
   Strategic Corporate Developments
   Select Key Player
B. Market Analytics
Table 21: Rest of World Recent Past, Current & Future Analysis for Smart Water Meters Markets Analyzed with Annual Sales Figures in US$ Thousand for Years 2013 through 2020 (includes corresponding Graph/Chart)

IV. COMPETITIVE LANDSCAPE
Total Companies Profiled: 67 (including Divisions/Subsidiaries 76)
The United States (23)
Canada (1)
Europe (24)
   - France (3)
   - Germany (6)
   - The United Kingdom (9)
- Spain (2)
- Rest of Europe (4)
  Asia-Pacific (Excluding Japan) (23)
  Africa (2)
  Middle East (3)

Ordering:


Order by Fax - using the form below

Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form

To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information

Please verify that the product information is correct and select the format(s) you require.

Product Name: Smart Water Meters - Global Strategic Analysis
Web Address: http://www.researchandmarkets.com/reports/3619372/
Office Code: SCBRY2L2

Product Formats

Please select the product formats and quantity you require:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic (PDF) -</td>
<td></td>
</tr>
<tr>
<td>Single User:</td>
<td>USD 4500</td>
</tr>
<tr>
<td>1 - 5 Users:</td>
<td>USD 6300</td>
</tr>
<tr>
<td>1 - 10 Users:</td>
<td>USD 8550</td>
</tr>
<tr>
<td>1 - 15 Users:</td>
<td>USD 10800</td>
</tr>
</tbody>
</table>

Contact Information

Please enter all the information below in BLOCK CAPITALS

Title:  
Mr ☐ Mrs ☐ Dr ☐ Miss ☐ Ms ☐ Prof ☐
First Name: ___________________________ Last Name: ___________________________
Email Address: * ___________________________
Job Title: ___________________________
Organisation: ___________________________
Address: ___________________________
City: ___________________________
Postal / Zip Code: ___________________________
Country: ___________________________
Phone Number: ___________________________
Fax Number: ___________________________

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:

Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account number</td>
<td>833 130 83</td>
</tr>
<tr>
<td>Sort code</td>
<td>98-53-30</td>
</tr>
<tr>
<td>Swift code</td>
<td>ULSBIE2D</td>
</tr>
<tr>
<td>IBAN number</td>
<td>IE78ULSB98533083313083</td>
</tr>
<tr>
<td>Bank Address</td>
<td>Ulster Bank, 27-35 Main Street, Blackrock, Co. Dublin, Ireland</td>
</tr>
</tbody>
</table>

If you have a Marketing Code please enter it below:

Marketing Code: ________________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:

(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World