



Gas Meter Report



Ed 8- 2010

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The World Gas Meter Report & Database Ed 8 2010 & The Meter Manufacturers Directory Ed 5 2010

Introduction

The gas meter market has been following the electricity meter trend to AMR in the US for some years and is increasingly doing the same in Europe, but at a much slower pace. With a new consciousness towards energy efficiency, driven partly by fears about the environment and partly by concern about energy security, gas utilities are now considering advanced metering, jumping from AMR one way to AMI two way communication. The UK is the first country to announce a national roll-out of advanced electricity and gas meters, totalling an enormous deployment of 49 million meters. We predict that gas metering will follow the trend to advanced metering more widely in the next few years.

Report Scope

In this new edition of the Gas Meter Report we have expanded the coverage of the marketing profiles to review 51 countries in detail, an expansion from 22 countries in previous reports. The countries contained are (new countries underlined): (Europe & CIS) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, UK; Asia (Pacific) Australia, China, India, Indonesia, Japan, South Korea, Malaysia, New Zealand, Philippines, Thailand, Taiwan, Vietnam; (South America) Argentina, Brazil, Chile; (North America) Canada, Mexico, USA, (Middle East) Iran: (Africa) Egypt, South Africa. The market is now broken down in value and volume by user segment, C&I and residential. The report also contains a table of population, numbers of households and the numbers of gas consumers in all gas using countries. The report includes a discussion of the market drivers. Types of gas meter and country practices for type approval are outlined. The gas utility sector is outlined. Advanced metering is discussed, with reference to the overlap of AMR and AMI.

Market analysis and meter types

- Meter demand in units and \$ value, forecast annually from 2009 to 2013
- Regional and country analysis of demand (179 countries)

Market participants

- The major companies globally and within region are identified with market shares by value and volume
- Company mergers and consolidations
- Market leaders identified in each major market

Advanced Metering, AMR and AMI

- Survey of global AMR and deployment
- Major AMR suppliers identified with market share for leader

Detailed surveys of the 51 largest gas meter markets, over 90% of the world market volume -

(Europe & CIS) Austria, Belgium, Bulgaria, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Russia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine, UK; Asia (Pacific) Australia, China, India, Indonesia, Japan, South Korea, Malaysia, New Zealand, Philippines, Thailand, Taiwan, Vietnam; (South America) Argentina, Brazil, Chile; (North America) Canada, Mexico, USA, (Middle East) Iran: (Africa) Egypt, South Africa.



- Number of gas customers
- Annual meter demand in units and \$ value (2009-2013)
- Meter type
- Market trend
- AMR deployment and development
- Type approval and certification, together
- Significant changes which are driving market development
- Market participants
- Utility background and market characteristics

Tables and spreadsheets containing:

- Global analysis and forecasts (2009-2013) for every market, for each of 179 countries
 - Gas consumers and annual demand (2009-2013)
 - Market analysis by stock/balance, imports, exports and demand, for every country
 - Market size and forecast for each year from 2009 to 2013 for every country, units and \$ value
- Analysis of demand by end user segment, C&I and residential in volume and value.
- Historical export data from 1997 to 2008/09 in units, \$ value and unit prices
 - A separate Excel file is available containing all of these tables plus an analysis of unit exports by country of origin and destination, for each year from 2003 to 2009

Meter Manufacturing Companies

- Major meter companies identified and consolidations and mergers outlined
- Directory of 989 meter manufacturers, including 288 producing gas meters

Metrology

- Outline of global metrology institutions and standards, procedures for type approval and meter verification
- Regional details and cooperation arrangements
- Methodology changes which are driving meter market developments

Methodology

The methodology of the study has been reviewed comprehensively by the ABS Intelligence Unit and new metrics have been introduced to reflect market evolution.

Each of the three main drivers was assessed separately (new building, replacement and refurbishment of meters, and up-grading of meters) and relevant metrics were considered, introduced or rejected. This is a more complex exercise than it at first appears and some obvious candidates were rejected after piloting calculations showed them to be false discriminators.

The dynamics of the market are changing and issues such as the conversion from electromechanical to solid state meters and the effect on replacement rates in the C&I and residential sectors have been reviewed. The growth of new housing, the demographic trends of household size, and electrification ratios have been researched and their implications assessed.

Extensive work has gone into reviewing the methodology, identifying improvements and establishing the correct metrics of the market and its dynamics. We believe that the new methodology is a significant improvement. It is described in detail in the report.

The Database

The report is accompanied by a database which includes:

- The tables from the report
- Current demand in units and value
- Forecasts annually to 2013 in units and value
- Export analysis annually from 1997 to 2007 in units, total \$ value and unit value
- Spreadsheet of exports by country of origin and importing country for 2003 to 2009



The Directory

The report is accompanied by a directory which includes:

A directory of 989 meter manufacturers (288 gas) with (where available) the address, tel, fax and generic email.

Price of report - £1,995
Price of Directory - £630
Price of report & excel database - £2,295
Price of report & excel database and directory - £2,495
<i>*For US Dollar and Euro prices please refer to www.absenergyresearch.com</i>

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7.1.15 Latvia

Table 7.15. Population, household and meter base - Latvia

Population	Households	Gas Consumers
2010	2010	2010
2,231,503	907,519	443,204

Annual demand for gas meters

Demand for gas meters in Latvia in 2009 was 21,318 units. The market is expected to remain roughly at this level through to 2013. By value, the market will be worth only slightly more in 2013 at €1.25 million.

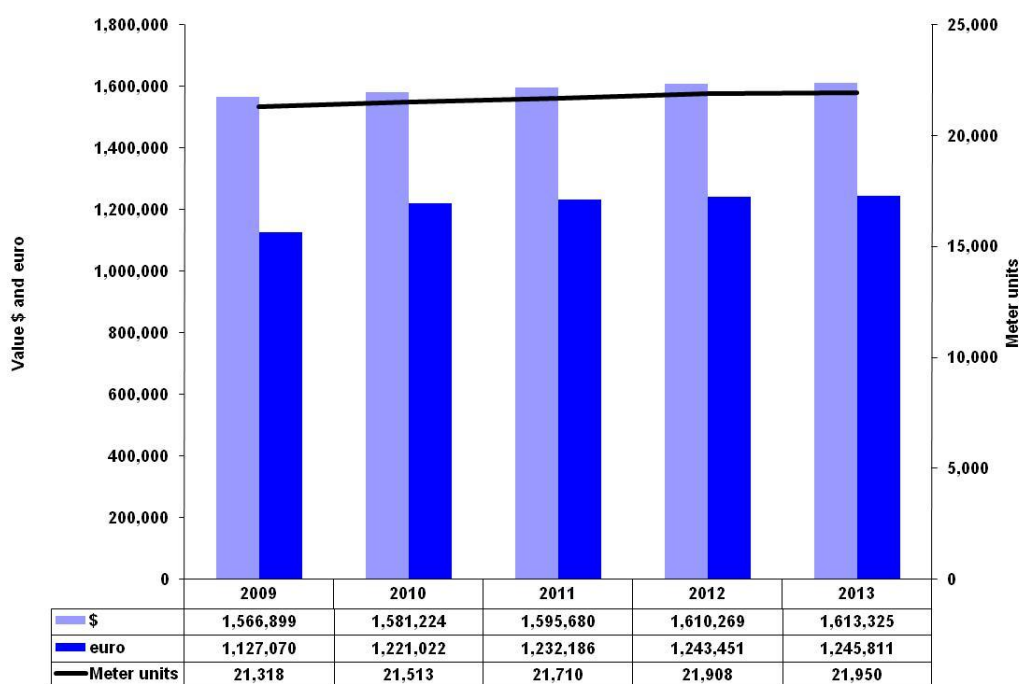


Figure 7.43. Annual demand for gas meters – Latvia

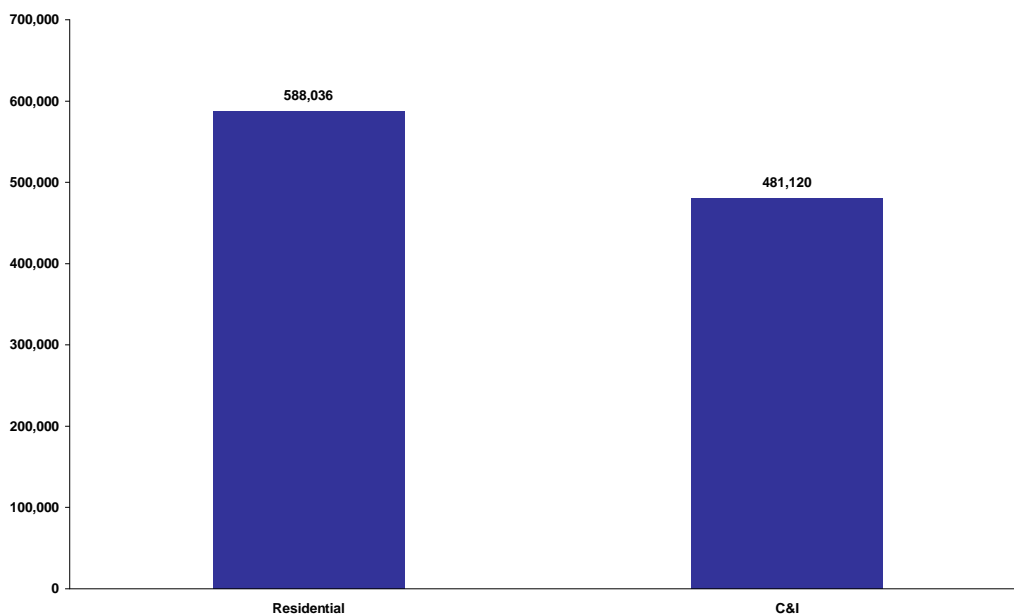


Figure 7.44. Gas Meter Segments by Value €2009 - Latvia

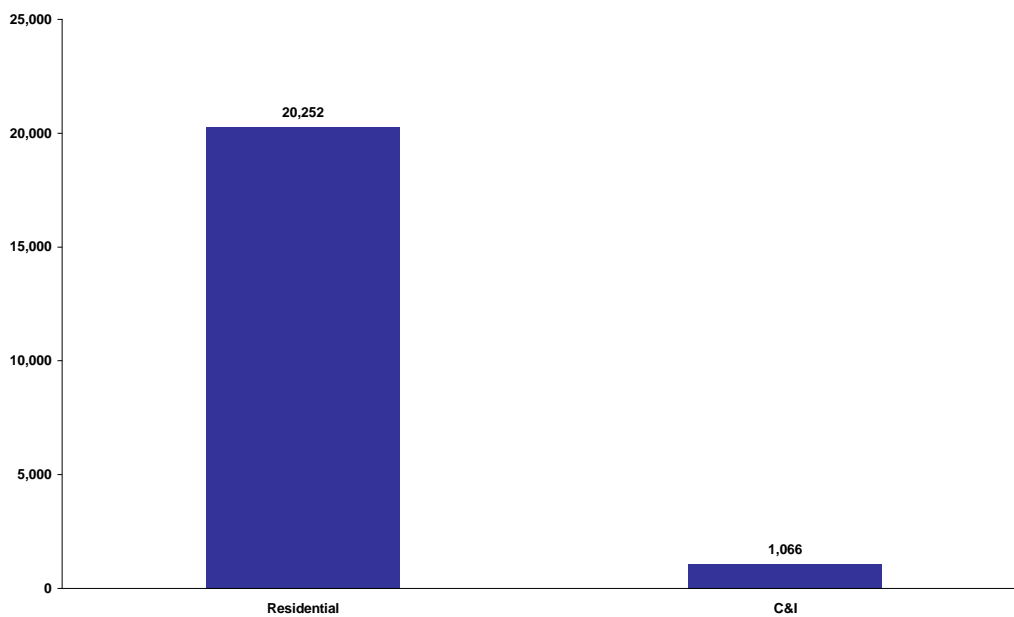


Figure 7.45. Gas Meter Segments (Units) 2009 - Latvia

Type approval and verification

The European Measuring Instruments Directive (MID) applies.

Utility background

Latvia does not produce any type of gas and imports all of its requirements directly from Russia, via pipelines originating in Siberia and passing through Minsk and Lithuania.

The share of natural gas in primary energy consumption in 2002 was 31.5% and in final energy consumption it was 6.7%.

Natural Gas has an important place in the Latvian energy market and it has been forecast that the share of gas in the total energy consumption will go up, bringing down the respective share of heavy fuel oil. The larger consumers of natural gas are heat generation at approximately 60%, industry at approximately 25% and other consumers at approximately 15%.

The Riga region accounts for 82% of the total natural gas consumption of Latvia, whereas natural gas is not used at all in Letgale region with the exception of Daugavpils city and Preili region. In Kurzeme, the highest gas consumption is in Liepaja.

The country is the least advanced of the Baltic States in deregulating its gas market; there has been no unbundling, no market opening and negligible network access to third parties.

The system of natural gas supply in Latvia includes 1,244 km of main and 3,507 km of distribution pipelines.

Latvijas Gaze is the joint stock company responsible for importing and supplying gas.

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