Water Meter Report

Ed 8- 2010

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

Introduction

The water meter sector is beginning to change, following in the path of the advanced metering revolution taking place in the energy sector, but at some distance behind it. In the US water utilities started to deploy AMR several years ago but it has not reached parity with the energy utilities. The emphasis is now changing for both sectors, to AMI. In a time of rising water prices there is a need to control costs but another important consideration enters the equation for water, scarcity of the resource. In recent years there have been a number of critical droughts in countries scattered over the globe. In some countries which rely on hydropower this has lead to a shortage of electricity, as was the case in Brazil several years ago. In other countries it has affected both industry and the population. In Taiwan in 2008/09 water was rationed to industry in order to provide drinking water for the population. In China scarcity of water is a national priority at the highest level. In the Middle East, Spain, the southern states of America water scarcity is a recurrent problem. Smart water meters are being deployed to manage the resource and this is a growth area. Irrigation meters are also increasingly prominent.

Another issue which the ABS reports addresses is the penetration and increasing usage of sub-metering. Property owners have always charged their tenants for water, but mostly they include it in the rent or allocate costs by RUBs (ratio utility billing), apportioning the charge according to floor area, numbers of occupants or some such variable. Sub-meters encourage tenants to use less water and they guarantee fair charges. Sub-meters have been around for some years but their usage is growing and we predict more growth. Sub-meters are used not only to measure total consumption but to monitor individual usage points, such as taps and boilers

Report Scope

In this new edition of the Water 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 installed base of utility water meters in all countries.

A valuable addition to the report is the inclusion of sub-meters, which we have not covered before. The report includes a discussion of the market drivers. Types of water meter and country practices for type approval are outlined. The water 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 water 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 2008/09

Meter Manufacturing Companies

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

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 tables from the report
• Current demand in units and value
• Forecasts annually to 2013 in units and value
• Export analysis annually from 1997 to 2008/9 in units, total $ value and unit vale
• Spreadsheet of exports by country of origin and importing country from 2003 to 2008/9

The Directory

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

Price of report - £1,995
Price of Directory - £630
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Table of Contents

List of Figures

List of Tables

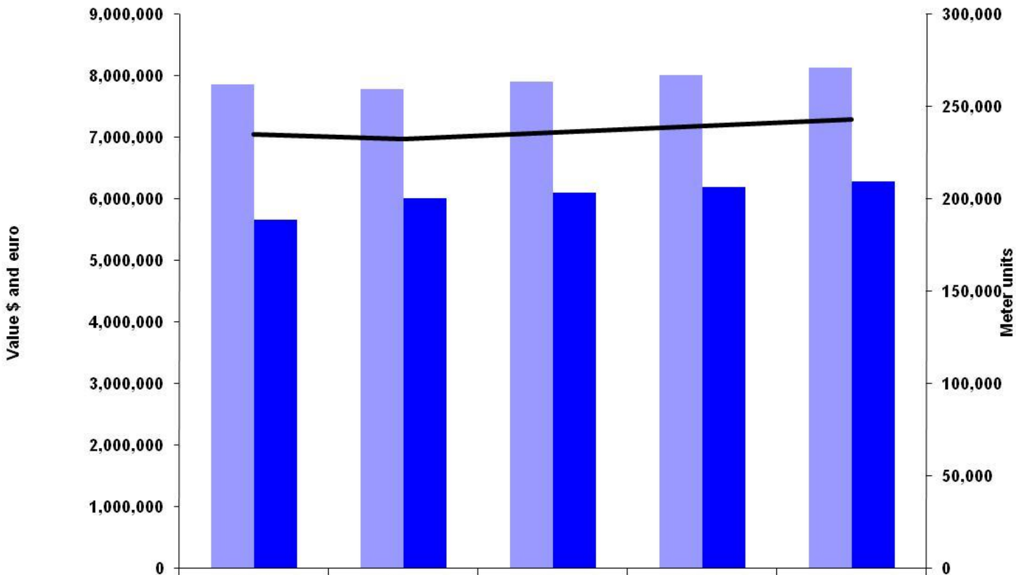
8.1.2 Austria

Table 8.2. *Population, household and meter base - Austria*

Population	**Households**	**Installed Utility Water Meter Base**
2010	**2010**	**2010**
8,210,281	3,770,224	2,824,380

Annual demand for water meters

Demand in 2009 was 235,031 meters. It is expected demand will increase a small amount to 2013 when it will reach 243,005 units. Market value in 2009 was €5.7 million and this will rise to €6.3 million in 2013.



	2009	2010	2011	2012	2013
$	7,870,233	7,791,531	7,905,109	8,020,342	8,137,256
euro	5,661,224	6,016,626	6,104,331	6,193,315	6,283,595
Meter units	235,031	232,681	236,073	239,514	243,005

Figure 8.4. *Annual demand for water meters – Austria*

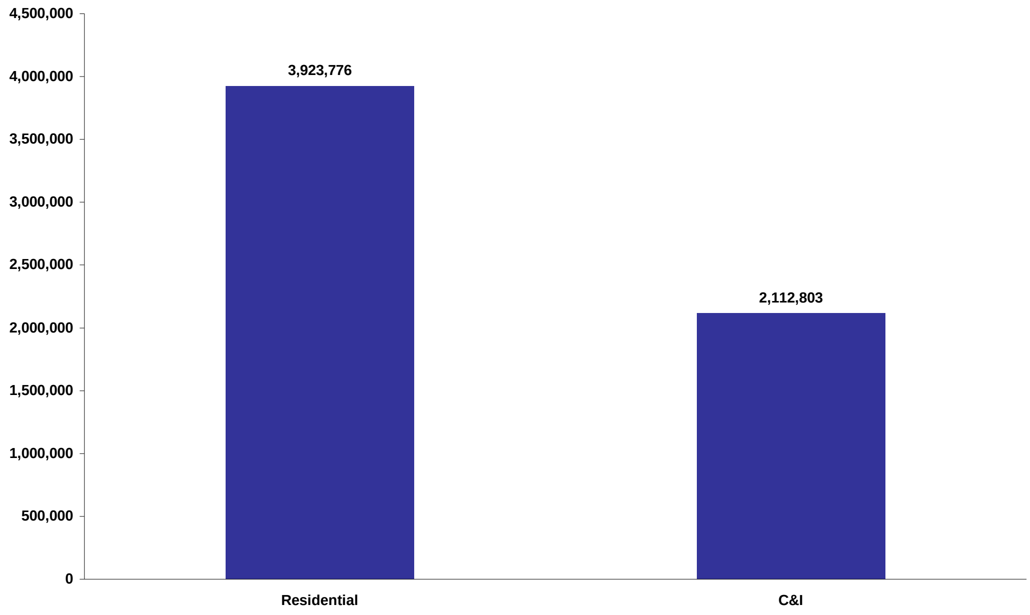


Figure 8.5. *Water Meter Segments by Value **€**2009 - Austria*

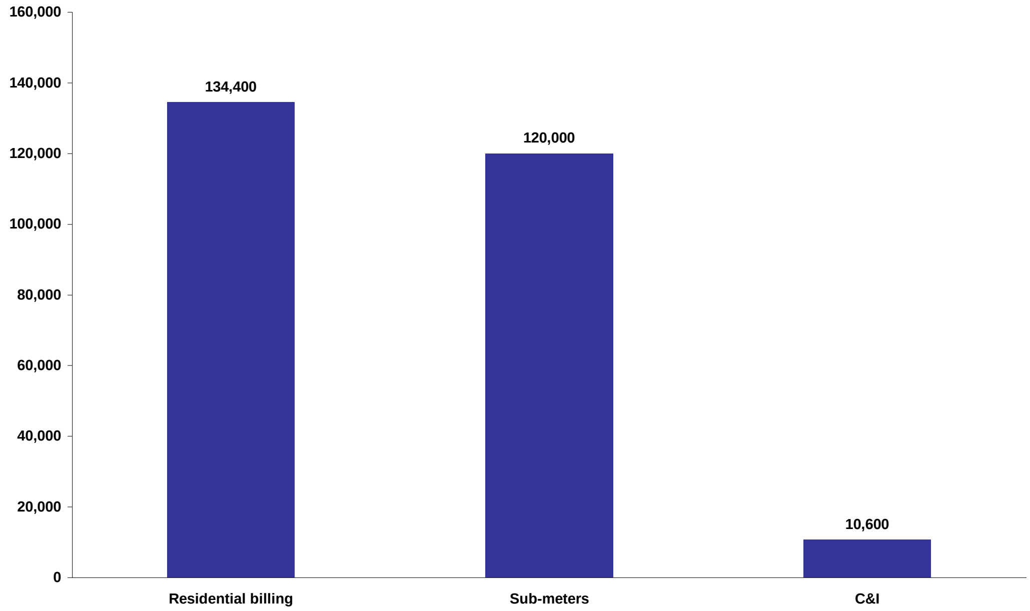


Figure 8.6. *Water Meter Segments (Units) 2009- Austria*

Market participants

- Elster
- Diehl (formerly Hydrometer and Sappel)
- Itron

Type Approval and Verification

The European Measuring Instruments Directive (MID) applies.

Utility background

Austria is a federal republic with nine provinces (Länder). Both government services and private institutions are responsible for water and waste services. The overall responsibility lies with the Authority of Water Affairs, in the federal government. Water supply is the responsibility of the regional municipalities, some of which contract supply out to private companies. There are approximately 1,000 large to medium and 4,000 small waterworks throughout Austria.

Public water supply via the public network serves mainly the domestic sector but also supplies industry and agriculture, which also use water from their own self-supply sources. There are considerable regional variations in the distribution between public supply and self-supply. For example, supply via the public network accounts for 66% of water abstraction in Voralberg compared with only 6% in Oberösterreich, where industrial activities predominate. However, there is some supply via the public network in all regions, regardless of industrial self supply.

There is widespread agreement among all actors and institutions in Austria that Austrian water resources are to remain under Austrian ownership. Furthermore, it is a general goal to keep multinational companies from gaining influence in the Austrian water market. The degree of privatisation favoured by interest groups varies considerably as does the level to which the private sector has been able to enter the market.

Government Ministry

- Federal Environmental Agency
- Austrian-Danube-Water-Cooperation

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