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The World Market for Positive Displacement Flowmeters, 3rd Edition

Overview



Publication Date: Q3 2020

www.flowPD.com

The World Market for Positive Displacement Flowmeters, 3rd Edition

Flow Research is conducting a new market study on the worldwide positive displacement flowmeter market. The primary goal is to determine the size of the positive displacement flowmeter market in 2019, with forecasts through 2024. The study is called *The World Market for Positive Displacement Flowmeters, 3rd Edition*.

Reasons for Growth

Positive displacement flowmeters are the workhorses of today's flowmeter world. They perform many important flow measurements that many people take for granted. Most notably, they are widely used for water and gas billing in residential, commercial, and industrial applications.

The large, saturated PD market makes revenue growth challenging. However, at the same time, the PD market overall benefits from the strength of a large installed base.

Rationale for Study

Even though PD meters face stiff competition from new-technology meters in some segments, they still remain the best solution for certain applications. PD meters excel where many other flowmeters have difficulties: low flow rates and high viscosity liquids.

Positive displacement flowmeters remain one of the most widely used types of flowmeters for measuring the flow of water, gas, and petroleum liquids. They remain a solid choice for many applications in today's modern process control environment.

We believe it is important to update this market. Our research will determine how well PD meters are holding their own in today's competitive environment.

The study plans to accomplish multiple purposes:

- Determine worldwide market size for the positive displacement flowmeter market in 2019
- Determine worldwide market shares for the positive displacement flowmeter market in 2019
- Forecast market growth for all types of positive displacement flowmeters through 2024
- Identify the industries and applications where positive displacement flowmeters are used, and identify market growth sectors
- Provide a product analysis for the main companies selling into the positive displacement flowmeter market
- Provide strategies to manufacturers to sell into the positive displacement flowmeter market
- Provide company profiles of the main suppliers of positive displacement flowmeters

Key positive displacement flowmeter market issues addressed in this study

- Growth outlook for PD meters
- Use in water, gas, oil and other process applications
- Replacement by other technology types
- Competitive price pressure
- End-user need
- Adoption rate of communication protocols
- Features that end users are looking for
- How to successfully compete in this highly competitive market

Background

Flow Research has been following the positive displacement flowmeter market since we published the first edition of our worldwide PD flowmeter study in 2002. We published a second edition in 2012 and provide quarterly updates on the market in our *Market Barometer* (www.worldflow.com).

In conducting this study, we are contacting all known manufacturers of positive displacement flowmeters worldwide to assemble a picture of the total PD flowmeter market. We ask suppliers to provide detailed information about geographic segmentation, industries sold into, types of PD flowmeters sold, and many other product segments. As a result, the study identifies where growth is occurring in the market, and the underlying factors driving that growth.

When analyzing target markets, Flow Research uses the perspective of all three segments – manufacturer, distributor/representative, and end user. We maintain regular communication with all three of these groups in order to be best positioned to note both subtle and significant shifts in technologies or buying patterns. We also use this steady flow of new information in support of our two Worldflow quarterly publications, **Market Barometer** and **Energy Monitor**. (For more information about Worldflow Monitoring Service, visit www.worldflow.com.)

Segmentation

Geographic Segmentation

- North America (U.S. and Canada)
- Western Europe
- Eastern Europe/FSU (inc. Central Europe and Former Soviet Union)
- Mideast and Africa
- Japan
- China
- Rest of Asia/Pacific
- Latin America (Mexico, Central, and South America)

Technology Types

- Oval Gear
- Rotary
- Helical Gear
- Nutating Disc
- Oscillating Piston
- Diaphragm
- Spur Gear
- Other

Casing Types

- Single
- Double

PD Operating Principle

A positive displacement flowmeter measures process fluid flow by continually filling and emptying compartments of known and fixed volume. In its most basic design, these compartments are placed between rotors that serve as measuring elements as they are rotated. Flowrate is calculated based on the number of times these compartments are filled and emptied in a period of time. The number of rotations of the rotor is typically counted by a pulse transmitter and converted to fluid volume and flowrate.

History of Positive Displacement Flowmeters

PD flowmeters date back to 1815, when Samuel Clegg invented a water-sealed rotating drum meter. Ten years later, Clegg's son-in-law, John Malam, together with Samuel Crosley, invented an improved model. Problems remained, however, including high cost, freezing, and large size. In 1830, James and Edward Dakwyne introduced nutating disc meters, a design still used today as water meters.

In 1843 and 1844 Thomas Glover and William F. Richards both independently developed "dry" gas diaphragm meters. Glover's meter contained two diaphragms and a sliding valve.

The diaphragm meters used today are similar to these early meters, but with major improvements in construction materials. The original diaphragm meters – created in response to problems with the existing sealed drum meters of the day – had sheet metal enclosures and sheepskin diaphragms. Today's diaphragm meters are made of cast aluminum and the latest synthetics.

Fluid Types

- Municipal Water
- Municipal/Industrial Gas
- Petroleum Liquids
- Non-petroleum Liquids (other than water)

Industries

- Oil & Gas (upstream, midstream, and downstream)
- Refining
- Chemical
- Food & Beverage
- Pharmaceutical/Biopharmaceutical / Life Sciences
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- District Energy
- Other

Applications

- Custody Transfer of Petroleum Liquids
- Billing for Liquids
- Gas Utility Billing
- High Viscosity Applications
- In-plant Processing
- Other

Sales by Customer Type

- End Users
- OEMs
- Systems Integrators
- Engineering and Consulting Firms

This study also includes:**Supplier Market Shares**

- Worldwide and
- by geographic region

Company Profiles

(see box with partial list)

Company Profiles

The following is a partial list of the companies profiled in this study

- Aichi Tokei Denki
- Badger Meter
- Bopp & Reuther
- Brodie Meter
- Diehl Metering
- Dresser NGS
- Flow Technology Inc.
- Great Plains Industries
- Honeywell Elster
- Isoil Impianti
- Itron
- KRAL
- Liquid Controls (IDEX Corp.)
- MacNaught
- Max Machinery
- OVAL Corp.
- Red Seal Measurement
- Satam
- TechnipFMC
- Tuthill Transfer

Sales by Distribution Channel

- Direct Sales
- Independent Reps
- Distributors
- E-Business

Growth Factors and Strategies for Success

- Discussion of market forces at work
- Factors contributing to growth
- Factors limiting growth
- Strategic action perspectives
- Real-world success stories

Publication Date: The target date for publication of this study is Q3 2020.

Flow Research, Inc. is the only market research company whose primary mission is to research process control instrumentation markets. We create these studies through interviews with suppliers, distributors, and end-users. Topics include all of the flowmeter technologies – both new and traditional – as well as pressure transmitters; temperature sensors; level devices; and studies specifically focused on certain major markets for flowmeters such as the oil and gas markets. Flow Research also started a working group focusing on flowmeter calibration, and has completed two studies on flowmeter calibration facilities. For further information on studies, links for articles and more visit the Flow Research website at www.flowresearch.com or call us at +1 781-245-3200.

Dr. Jesse Yoder, President of Flow Research and the lead analyst for this study, has over 30 years of experience writing about and analyzing process control and instrumentation markets, beginning as president and founder of Idea Network. In addition to the years he has spent writing market studies, Dr. Yoder spent 10 years as a technical writer. Almost four years of this were spent writing technical manuals and training guides for the process control division of Siemens. He also taught technical writing at the graduate level at Northeastern University and the University of Massachusetts Lowell. Dr. Yoder spent 10 years as an adjunct philosophy professor at the University of Massachusetts Lowell and Lafayette College.

Dr. Yoder has received two patents for new flowmeter designs. Several prototypes of these designs have been built and are currently being tested. He has led the research of over 250 market studies, published nearly 300 articles on flow and instrumentation in industry journals, and two books. His latest book, *The Tao of Measurement: A Philosophical View of Flow and Sensors*, with Richard E. Morley as co-contributor, was published in 2015 by the International Society of Automation (ISA). Topics covered include temperature, pressure, flow, time, length, and area. Dr. Yoder is currently writing a third book called *Advances in Flow Measurement* that will be published in 2020 by CRC Press.

Belinda Burum, Vice President, worked in journalism and advertising before entering high tech as a writer, marketing communications manager, and customer references consultant. She joined Flow Research in 2002, and has worked on many projects, studies and publications.

Norm Weeks, Senior Market Analyst, joined Flow Research in November 2004 after 24-years with Verizon specializing in innovative solutions for major enterprises, introducing new products and lifecycle management strategies, and product marketing. He also served as Director of the Urban Fellows Institute in New York. At Flow Research, he has a major involvement in and his contributions to project development, research, analysis and writing are significant. Custom projects are a specialty. He also contributes to White Papers, Worldflow and other publications.

Leslie Buchanan, Publication Production Associate, and Research Assistant, joined Flow Research in March 2010, with skills from a variety of work and life experiences. Early on, she worked with the contacts database, assisted with customer liaison, and took on our publication formats. She has since become increasingly involved in many capacities with Flow Research studies, projects, Worldflow and other publications.

Victoria Tuck, Administrative Assistant, joined Flow Research in June, 2012. She has experience in both the fast-paced law firms of Boston, and in various nonprofit organizations.

She handles a variety of office functions – essential to keep any business running – as well as assisting in other ways, including the contacts database and news for the Worldflow publications.

Gabriella DeCologero, Director of Marketing, joined Flow Research in June 2019. She is in charge of our social media outreach, and has brought her graphic design talents to our marketing efforts. Gabriella is also assisting in our customer contacts and outreach.

Flow Research studies contribute to an ongoing view of the flowmeter market

Listed below is a summary of recent and upcoming Flow Research studies in the area of process control instrumentation. These studies are further described at www.FlowStudies.com.

The World Market for Coriolis Flowmeters, 6 th Edition	www.FlowCoriolis.com
The World Market for Magnetic Flowmeters, 6 th Edition	www.FlowMags.com
The World Market for Ultrasonic Flowmeters, 5 th Edition	www.FlowUltrasonic.com
The World Market for Vortex Flowmeters, 6 th Edition	www.FlowVortex.com
The World Market for Primary Elements, 2 nd Edition	www.FlowPlate.com
The World Market for Pressure Transmitters, 5 th Edition	www.PressureResearch.com
The World Market for Thermal Flowmeters, 2 nd Edition	www.FlowThermal.com
The World Market for Positive Displacement Flowmeters, 2 nd Ed.	www.FlowPD.com
The World Market for Turbine Flowmeters, 2 nd Edition	www.FlowTurbine.com
The World Market Mass for Flow Controllers, 3 rd Edition	www.FlowMFC.com
The World Market for Multiphase Flowmeters, 2 nd Edition, and Module A: The World Market for Watercut Meters	www.FlowMultiphase.com www.WatercutMeters.com
The World Market for Flowmeters, 7 th Edition, and, Module A: Strategies, Industries, and Applications	www.FlowVolumeX.com
The World Market for Gas Flow Calibration Facilities	www.FlowCalibration.org
The World Market for Liquid Flow Calibration Facilities	
The World Market for Natural Gas and Gas Flow Measurement, 2 nd Edition (six volumes)	www.GasFlows.com
The World Market for Oil and Oil Flow Measurement	www.OilFlows.com
The World Market for Steam Flow Measurement	www.SteamFlows.com
Worldwide Survey of Flowmeter Users, 2 nd Edition	www.FlowResearch.com
The World Market for Level Devices: Radar, Magnetic Level Indicators, and Ultrasonic	www.LevelResearch.com
The World Market for Liquid Analytical Instruments	www.FlowAnalytical.com

Worldflow Monitoring Service

In addition, Flow Research provides quarterly updates on the flow and energy industries in the *Market Barometer* and *Energy Monitor*. *Market Barometer* provides current information on process control instrumentation and the companies within the industry. *Energy Monitor* analyzes the current state of the Oil & Gas, Refining, Power, and Renewable industries, and the implications for instrumentation suppliers. Both reports are part of the Worldflow Monitoring Service. More details are available at www.worldflow.com.



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Blaise Pascal

The Flow Research Gold Partner Program

To produce studies that most closely match our clients' needs, Flow Research has instituted the Gold Partner Program. This program enables companies who wish to participate at a high level in a study's research to influence its scope and segmentation. In addition, Gold Partners receive regular updates from Flow Research on study progress, and receive a significant discount on the regular price of the study.

Procedure: Early in the planning phase of a study, Gold Partners receive a proposal that includes the proposed segmentation. Gold Partners can propose additional segmentation, and can also suggest changes to the proposed segmentation. While the decision to adopt particular segmentation ultimately lies with Flow Research, and is based on input from all contributors, we do our best to accommodate the specific needs of each of our clients.

During the research phase of a study, Flow Research will issue regular reports that provide updates on the progress of the research. These reports will be sent to Gold Partners, who are then invited to provide any additional input or comments into the study.

Being a Gold Partner requires making an early commitment to purchase the study. However, in return, Gold Partners receive a significant discount off the regular price of the study. Payment can be made either in one amount at the beginning of the study, or split into two, with the second payment due upon delivery of the study.

For additional details, or to find out how the Gold Partner Program applies to any particular study, please contact Flow Research. We look forward to working with you!

For answers to any question you may have regarding the above, please contact Norm Weeks at +1 781 245-3200, or norm@flowresearch.com.

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(Photo courtesy of TechnipFMC)



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Why Flow Research?

- We specialize in flowmeter markets and technologies.
- We research both new-technology and traditional technology flowmeters.
- We contact every known supplier for each study.
- We have data on the flowmeter market going back to 1992 and have been actively following it since then.
- We offer our studies in both electronic and color-printed hardcopy format.

www.flowPD.com