

The Global Water Metering Landscape: Technology Shifts, Competitive Strategies, and Market Outlook

New Insight Report + Data
Complete report available by 31 March 2023.
Data provided through our Data Navigator platform.

About this Insight Report

The century-old water metering market is at an inflection point, as a host of new digitally enabled technologies and business models transform global water utilities' relationships with their meters and meter providers. Against this backdrop, metering vendors face a host of macroeconomic, regulatory, and competitive shifts, from COVID-related supply chain shortages to a growing roster of agile newcomers and outsiders looking in.

Metering is the largest segment of the global digital water market, accounting for a third of total digital water spend. Bluefield projects that meter technology and services spend will scale at a 7.8% CAGR from US\$7.5 billion in 2021 to US\$14.7 billion in 2030, with 1.5 billion meters and endpoints sold.

This Insight Report provides an in-depth analysis of the global water metering market, including technology shifts, competitive dynamics, and market outlook. The report highlights emerging trends across the metering hardware, software, connectivity, and services landscape, and evaluates the strategic positioning of 20 top meter firms serving diverse global markets, as well as the broader ecosystem of metering software and services firms.

Diverse Roster of Firms Vie for Global Metering Dominance

Top global metering vendors range from water pure-plays, IoT firms, and energy metering incumbents to highly diversified industrial conglomerates serving the telecom, aerospace, and healthcare sectors.



report SCOPE

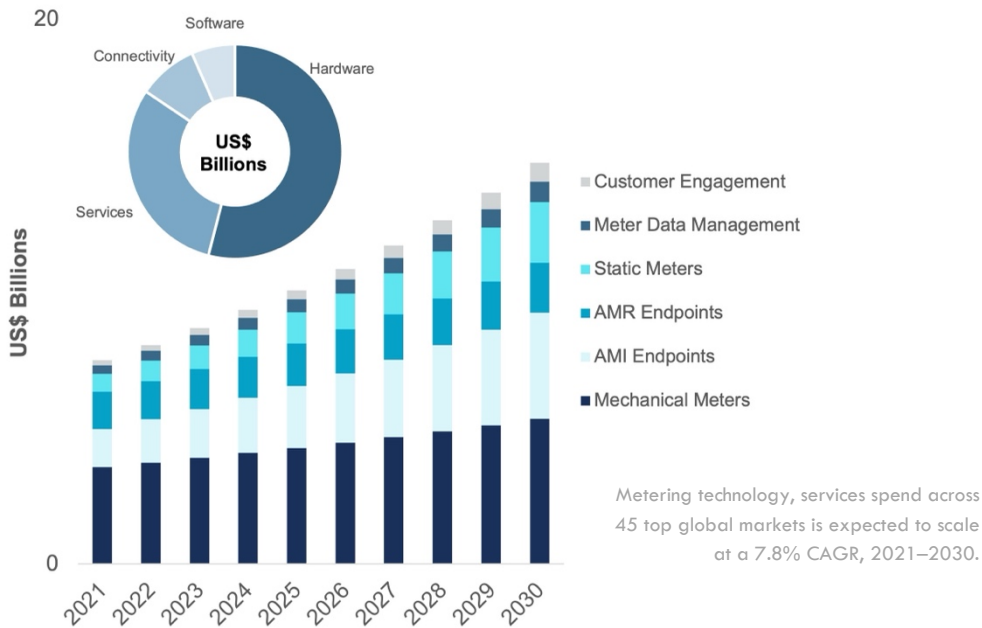
Backed by a transparent research methodology, this Insight Report provides **qualitative and quantitative market data** to help companies understand the **current landscape** and **projected future growth** of the global water metering market.

report HIGHLIGHTS

- Drivers and trends shaping global water metering market
- Key technology and business model shifts
- Competitive landscape of global metering providers
- Market share of key global metering companies
- Company profiles of leading metering players
- Market forecasts by region and technology segment (\$ spend and meter unit sales)

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Exhibit: Global Water Metering Forecast by Segment & Product Type, 2021–2030



Comprehensive analysis of water metering drivers, trends, technology shifts, and competitive strategies to help companies compete in the water metering market.

Who should buy this report?

- Metering manufacturers (including electric & gas metering providers)
- Metering service providers
- IoT Firms
- Water pure-plays
- Diversified equipment providers
- Big tech and telecom firms
- Private equity, venture capital investors, and financial firms
- Water and wastewater utilities

Sample Insights

- Top metering firms have made 32 total acquisitions in the past 15 years, leveraging M&A to buy up distribution channels, scale meter product portfolios, and diversify into other digital water segments.
- Shifts in metering technology (e.g., static meters, analytics software) and services (e.g., cellular and LPWAN communications, as-a-Service business models) are shaking up the metering landscape, spurring utility demand and opening the door to a host of new competitors.
- Incumbent U.S. water metering providers (Sensus, Neptune Technology Group, Badger Meter, Itron) enjoy double-digit market share, though newer players from Europe (Kamstrup, Axioma Metering) and China (Sanchuan Wisdom, Suntront Technology) are making inroads in key regional markets.

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Key questions addressed in this report

What is the outlook (\$ spend and unit sales) for the global metering market by country and by technology segment?

What is the market share of key metering companies and what are their expansion strategies?

How are technology shifts—such as the shift from mechanical to static meters—impacting market growth opportunities?

What are the distinct capabilities of leading metering vendors and how do vendors differentiate themselves?

What are the market factors and trends driving metering hardware, software, services, and connectivity investment?

How is the water metering market impacted by supply chain challenges, including the semiconductor shortage?

How are software and telecom firms competing in the metering space?

We find real value in Bluefield's responsiveness and transparency in answering questions about the supporting data and research methodology used in their water market insights.

--Research Specialist
Black & Veatch



Bluefield's reports contain tons of useful, detailed data and qualitative inputs into key trends. We rely on their insights for our business planning.

--Market Research Analyst
Leading Engineering Company



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- Metron-Farnier
- Mueller Water Products
- Neptune Technology Group
- Sagemcom
- Sanchuan Wisdom
- Sensus
- Suntront Technology
- Taggle Systems
- ZENNER International

Bluefield selected **20 global metering manufacturers** offering diverse coverage in terms of geography, firm size, value chain position, and product offerings. Our analysis focuses on comparing these firms' capabilities and strategic positions in digital water.

Each company profile includes:

- Overview & Strategy
- Key Statistics
- Water Metering Product Offerings
- Recent Market Activity
- Clients / Case Studies

*Appendix includes Select Meter Product Specs by Vendor (Factors Measured, Data Interval, Data Upload Frequency, Device Memory, Broadcast Network, Battery Life, Warranty Period, Meter Digits, Battery Type).

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\$3,500 USD Report

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Purchase option 2: Report + Data

Data is a key component to this analysis. Our team has compiled relevant data dashboards available as an add on purchase option. Dashboards are accessible in Bluefield's Data Navigator platform.

\$5,000 USD Report + Data

Immediate report download upon release.

Access to data provided same day.

Purchase Report

As most people know, Amazon is a very data-driven culture. Having the depth of market intelligence and the ability to deep dive into Data Navigator has been invaluable to our team. We are able to quickly generate defensible insights that guide our decision-making process.

-- Patrick Keaney
Worldwide Head of Development
AWS Water



about

BLUEFIELD RESEARCH

Companies across the value chain are developing strategies to capitalize on opportunities in water but are often challenged by a lack of high-quality, reliable intelligence. Bluefield bridges this gap with actionable, data-backed analysis that is supported by a transparent research methodology and ongoing access to our global team of water experts.

As an independent insight firm focused exclusively on water & wastewater in the municipal and industrial sectors, executives rely on our suite of insight services to validate assumptions, address critical questions, and strengthen strategic planning processes.

Bluefield works with key decision makers at utilities, project development companies, industrial companies, engineering firms, technology vendors, manufacturers, and investment companies, giving them tools to execute growth strategies.

Bluefield does not charge or exchange goods with industry players for inclusion in its research. The firm retains editorial control and the right to express fact-based opinions that are not influenced by clients.

Boston
Barcelona
Chicago
New York
Paris
San Francisco

North America: +1 (617) 910 2540

Europe: +34 617 464 999

www.bluefieldresearch.com

waterexperts@bluefieldresearch.com