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Dear Friend of Flow:

We are pleased to announce the release of our new study, **The World Market for Ultrasonic Flowmeters, 3<sup>rd</sup> Edition**. This is a completely new edition of a study that was first published in 2001 and 2003. The ultrasonic flowmeter market is the fastest growing of any flowmeter market, and it is especially important for flowmeter suppliers to have accurate and up-to-date data on this market.

This study is unique in that we received extremely good cooperation from the suppliers. In almost every case, suppliers who returned our questionnaire filled it out completely. And we received filled out questionnaires from nearly all the significant suppliers. Although this study was somewhat delayed, the result was that we were able to get very solid numbers for 2007.

This study breaks new ground in terms of segmentation. Some examples of the segmentation include the following:

- Geographic region
- Transit Time/Doppler/Hybrid
- Single and Dual/Multipath
- Clamp-on/Insertion/Spoolpiece
- Liquid/Gas/Steam
- Line Size
- Portable/Fixed
- Diametral/Chordal/Hybrid
- Smart/Conventional
- Communication Protocol\
- Single/Dual/Three/Four/Five/Six+ Paths
- Application (7)
- Industry (10)

We have tried to isolate the fast-growing market for custody transfer of natural gas by looking at it from several perspectives. I am hopeful that this 470-page study will clarify that market, and will also provide some good insights into the market as a whole, due to the extensive segmentation.

One reason for the comprehensive segmentation in this study is the excellent feedback we received to our initial proposal, which is reprinted in Appendix A. The diametral/chordal/hybrid segmentation came as direct feedback from this proposal, as did quite a lot of other segmentation. We greatly appreciate the feedback we received from suppliers.

The ultrasonic study has traditionally been one of our most popular studies, and this study is already very much in demand. We welcome any comments on the study.

Best regards,

Jesse Yoder  
President  
Flow Research, Inc.

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