

## **Radar Level Transmitter - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Radar Level Transmitter Market size is estimated at USD 573.05 million in 2024, and is expected to reach USD 758.58 million by 2029, growing at a CAGR of 5.77% during the forecast period (2024-2029).

Coronavirus's impact has not been the same on the vendors since some of them offer and service radar-level transmitters only for the food sector. In contrast, others provide only for the oil & gas sector. Nowadays, vendors who cater to food processing are most profitable since the manufacturing of food-related items has been deemed under essential services, and those facilities have been working extra hours to fulfill the demand. However, from the supply side, the vendors face issues procuring the components due to disruption in the supply chain

#### Key Highlights

- Level measurement technology is widely used across many sectors such as construction, industrial, wastewater, manufacturing, oil, and gas, among others. Radar level measurement is based on calculating the time required for completion of the trip between the transducer and the sensed material level.
- The performance of radar level transmitters has improved over the last few years, but their costs haven't increased at a similar rate. They have become more affordable compared to several other level measurement technologies. However, the product's economic benefit isn't limited to return on investment (ROI) also. As the expertise required to set up newer level technologies has decreased, installation and operations costs have even gone down significantly.
- For both non-contacting or contacting radar, significant improvements in digital signal processing and radar component design have allowed them to handle a broader range of applications even as the price has dropped. In the case of some radar level transmitters, the operating frequency has moved to the W band. Within this frequency spectrum, instruments operating from 78 GHz to over 80 GHz are now more popular than other variants.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

-To an end-user, the focus should not be the operating frequency because some level applications are better-suited for lower operating frequencies. Moreover, the higher frequency provides unprecedented flexibility in terms of installation. Thus, the need to retrofit the process connections where instruments are installed has decreased. Another benefit of higher frequency is the instrument signal is much narrower than the signal from instruments operating in the C band.

## Radar Level Transmitter Market Trends

### Contact System (Guided Wave Radar) Technology to Hold Maximum Market Share

- Radar transmitter can have a hard time in applications with different dielectric constants that cause electric reflectivity. If there is a material with low conductivity like propane or LNG, signals can bounce back weak. This is where GWR can help because it focuses energy down a rod, which shows changes in the dielectric constant, and allows readings that couldn't be seen before.
- The significant increase in signal strength and efficiency allows GWR to be used in boiler-level applications. Newer GWR designs have sensors, microprocessors and mounting innovations that enable them to get even closer to the process they're measuring. While high-temperature applications used to rely on pressure devices to indicate level, gradual improvement in radar and GWR are allowing them to also serve in these environments.
- For instance, in case of power and steam generation which undergo fast starts and cycling operations, dynamics in the steam drum rapidly change causing inaccuracies in traditional level measurement techniques that rely on pressure. This inaccuracy may lead to carryover which can cause coating of critical boiler components and turbine blades, or it may waste energy due to excessive blowdowns. To ensure accurate level measurement in the steam drum during all operations, users have moved towards GWR level transmitters to directly measure the level as this technology is not affected by changes in process media characteristics.
- Companies are working towards product innovations, which is helping to overcome this challenge. For instance, Mangetrol International Inc has developed an innovative probe design that includes new Condensation Control Technology (CCT) coupled with its original patented Automatic Steam Compensation (ASC). The new steam probe with CCT eliminates inaccuracies caused by condensation so that optimal performance can be achieved. Rosemount provides 5300 Level transmitter based on GWR technology. This transmitter is suitable for challenging measurements on liquids, slurries, and solids, providing modern reliability and safety features in level and interface applications.

### Asia Pacific Occupies the Largest market Share

- The market for radar level transmitters in the Asia-Pacific region is anticipated to witness significant growth owing to the established base of industries, such as chemicals & petrochemicals and mining industries. Due to rapid economic growth and large-scale urbanization in these countries, China and India provide exciting opportunities for players offering radar-level transmitters.
- In addition to the products offered by the key players, the market is also witnessing the growth of product offerings from domestic players. For example, SBEM Pvt., Pune, India, Ltd has been offering non-contact, continuous Pulsed Radar-based Level transmitter series 138 for level indication of bulk solids & liquids.
- The chemicals and petrochemicals, food & beverages industries are observing development in the region. Water-intensive industries such as these require treatment facilities and are expected to generate greater demand for the market studied. Besides, the high rate of urbanization in emerging countries across the region has increased the pressure on existing water and wastewater infrastructure. This, in turn, has pushed the demand for level monitoring solutions, partly to improve asset efficiency and partly to meet water conservation goals.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Radar Level Transmitter Industry Overview

The global radar level transmitter market is moderately fragmented. The companies operating in the market are leveraging strategic collaborative initiatives to offer specialized products, increase their market share, and increase their profitability. The companies operating in the market are also into mergers and acquisitions of start-ups that help in improving the served market portfolio on radar level transmitters to strengthen their product capabilities, thus offering lucrative expansion opportunities. Some of the recent developments in the market are:

- December 2020 - AMETEK Drexelbrook expanded its guided wave radar, level measurement offering with the introduction of an enlarged coaxial sensor for The Impulse GWR. The new 1.66' diameter probe offers reliable accuracy within high viscosity liquids. The new coaxial sensor option for The Impulse GWR allows the material to easily flow off of the probe when used with viscous fluids.
- March 2021 - AMETEK announced that it had completed the acquisition of three companies, including Magnetrol International, Crank Software, and EGS Automation (EGS). The company spent nearly USD 270 million on these acquisitions, which have combined annual sales of approximately USD120 million.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

### Table of Contents:

#### 1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

#### 2 RESEARCH METHODOLOGY

#### 3 EXECUTIVE SUMMARY

#### 4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Impact of COVID-19 on the Market
- 4.3 Market Drivers
  - 4.3.1 Rising Demand for Radar Level Transmitters in the Water and Wastewater Industry
  - 4.3.2 High Reliability, Precision, and Stability Offered by Radar Level Transmitters
- 4.4 Market Challenges
  - 4.4.1 Technical Challenges Related to Accuracy in Measurements and High Cost
- 4.5 Industry Value Chain Analysis
- 4.6 Porters Five Force Analysis
  - 4.6.1 Threat of New Entrants
  - 4.6.2 Bargaining Power of Buyers/Consumers
  - 4.6.3 Bargaining Power of Suppliers

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.6.4 Threat of Substitute Products
- 4.6.5 Intensity of Competitive Rivalry

## 5 MARKET SEGMENTATION

- 5.1 Technology
  - 5.1.1 Contact System (Guided Wave Radar)
  - 5.1.2 Noncontact System (Free Space Radar)
    - 5.1.2.1 FMCW Radar
    - 5.1.2.2 Pulsed Radar
- 5.2 Application
  - 5.2.1 Liquids, Slurries, and Interfaces
  - 5.2.2 Solids
- 5.3 End-user Industry
  - 5.3.1 Oil and Gas
  - 5.3.2 Food and Beverages
  - 5.3.3 Water and Wastewater
  - 5.3.4 Chemicals and Petrochemical
  - 5.3.5 Metals and Mining
  - 5.3.6 Other End-user Industries
- 5.4 Geography
  - 5.4.1 North America
  - 5.4.2 Europe
  - 5.4.3 Asia-Pacific
  - 5.4.4 Rest of the World

## 6 COMPETITIVE LANDSCAPE

- 6.1 Company Profiles
  - 6.1.1 Siemens AG
  - 6.1.2 Emerson Electric Co.
  - 6.1.3 Endress+Hauser Management AG
  - 6.1.4 ABB Limited
  - 6.1.5 Honeywell International Inc.
  - 6.1.6 VEGA Grieshaber KG
  - 6.1.7 Krohne Messtechnik
  - 6.1.8 Yokogawa Electric Corporation
  - 6.1.9 Ametek Inc.
  - 6.1.10 Magnetrol International Inc.
  - 6.1.11 Schneider Electric SE
  - 6.1.12 Pepperl+Fuchs Pvt. Ltd
  - 6.1.13 Automation Products Group Inc.
  - 6.1.14 Nivelco Process Control Corp.
  - 6.1.15 Matsushima Measure Tech Co. Ltd

## 7 INVESTMENT ANALYSIS

## 8 FUTURE OF THE MARKET

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Radar Level Transmitter - Market Share Analysis, Industry Trends & Statistics,  
Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-27"/>
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

