



Using the annual MCAA Industry Forecast? Forecasts now available for Individual Product Lines!

MCAA Product Line Forecast Report

Working together, MCAA and Global Automation Research LLC have developed a more extensive forecast report, the Product Line Forecast report (PLF report). The PLF report provides MCAA members with 17 categories, comprising **75 individual product lines**.

MCAA Industry Forecast

The MCAA Industry Forecast reports the current year market value and 5-year forecast for 15 process automation product categories. Each category is composed of several individual product lines. For example, the "Electronic Flow" category is composed of Magnetic, Coriolis, Ultrasonic, Vortex and Thermal Mass Flow Meters. The product category forecast is one part of a more extensive report covering discussions of 12 industry segments, an international summary, special topics each year, and a brief mid-year update report.

PLF Report Scope

MCAA members will have access to market forecasts for 75 process automation product lines. (See PLF Scope below.) The report provides the prior year and current (base) year market size estimate and a five-year forecast. Each product line market size estimate and forecast is further segmented by 12 process industry segments. (See Industry Coverage below.)

Deliverable

The report is an Excel spreadsheet containing a database of market information for client-selected product lines and/or groups. A separate Demo PLF Report has been prepared that shows the entirety of a report content. Global Automation Research LLC will offer a 40 minute webinar option for clients who wish an in-person review of the report data with a principal analyst of Global Automation Research LLC.

Report Availability

Market data will be updated annually, after completion of that year's MCAA Industry Forecast, typically mid to late September.



PLF Report Fees

MCAA Sponsorship - Global Automation Research LLC is providing a 30 per-cent to MCAA members.

Product Line Forecast Report Fees*

		Number of Product Lines	First 3**	5 to 15	16 to 25	25+
USA	Fees per Order	MCAA Member	\$2,500 Minimum	\$400 each	\$275 each	Contact Global Automation Research LLC
		Non-MCAA Member	\$3,575 Minimum	\$575 each	\$425 each	

*PLF Fees are subject to change at any time. A formal proposal from Global Automation Research LLC is the commercial commitment to a Client inquiry

** The minimum order value = \$2,500 for MCAA Members, \$3,575 for non-members

Product Line Forecast Report Fees*

		Number of Product Lines	First 3**	5 to 15	16 to 25	25+
Canada	Fees per Order	MCAA Member	\$1,250 Minimum	\$200 each	\$150 each	Contact Global Automation Research LLC
		Non-MCAA Member	\$1,800 Minimum	\$300 each	\$225 each	

*PLF Fees are subject to change at any time. A formal proposal from Global Automation Research LLC is the commercial commitment to a Client inquiry

** The minimum order value = \$1,250 for MCAA Members, \$1,800 for non-members

40 Minute Webinar Option

The webinar will include an overview of the forecasting methods used by Global Automation Research LLC and a walk-through of the Excel Workbook PLF report. Finally, Client questions will be addressed, throughout the presentation. Fees for the 40 minute webinar are \$600.00.



Delivery Time

Delivery time will typically be 2 to 6 weeks, depending on current Global Automation Research LLC commitments.

2021 PLF Report

A PLF report version, based on the Sept. 2021 MCAA Forecast, is available after December 1, 2021.

Proposals

MCAA members can obtain formal proposals for their custom PLF reports from Global Automation Research LLC.

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ADDITIONAL GLOBAL AUTOMATION RESEARCH LLC RESOURCES

Global Automation Research LLC provides a broad range of additional market research and analysis services. We can provide our Clients with more extensive and focused analysis of product, industry or region markets and acquisition strategic services. See at the end of this document for more information.

Product Line Forecast Scope

PLF Category Code	PLF Category	PLF Code	Client selects PLF Products Lines*	*Some PLF Product Lines are the Sum of the Market Value for the following Products
A	Pressure	A01	Differential Pressure Flow	
		A02	Differential Pressure Level	
		A03	Gauge/Abs Pressure Trans.	
		A04	Pressure Transducers	
		A05	Orifice Plates	
		A06	Pitot Tubes/Bars	
		A07	Other Flow Elements	Venturi Flow, Flow Nozzle, Other Flow Elements
B	Temperature	B01	Temperature Sensors	Temp RTD's, Thermocouples
		B02	Thermowells	
		B03	Temperature Transmitters	
C	Electronic Flow	C01	Magnetic Flow Meters	
		C02	Coriolis Flow Meters	
		C03	Ultrasonic Flow Meters	
		C04	Vortex Flow Meters	
		C05	Thermal Mass Flow Meters	
D	Mechanical Flow	D01	PD Flow Meters	
		D02	VA Flow Meters	
		D03	Turbine Flow Meters	
E	Continuous Level	E01	Capacitance Level	
		E02	Ultrasonic Level	
		E03	Microwave NC Level	
		E04	Microwave Contact Level	
		E05	Mechanical/Other Level	Float, Magneto-strictive, Nuclear, Other Level
F	Point Level	F01	Capacitance Point Level	
		F02	Ultrasonic Point Level	
		F03	Conductance Point Level	
		F04	Vibration Point Level	
		F05	Other Point Level	Nuclear, Thermal, Other Point Level

PLF Category Code	PLF Category	PLF Code	Client selects PLF Products Lines*	*Some PLF Product Lines are the Sum of the Market Value for the following Products
G	Tank Gauging	G01	Microwave NC Tank Gauging	
		G02	Hydrostatic Tank Gauging	
		G03	Microwave Contact Tank Gauging	
		G04	Servo Tank Gauging	
		G05	Other Mech. Tank Gauging	Float & Tape, Load Cell, Other Mech/Elec Tank Gauging
H	Gauges & Switches	H01	Magnetic Level Gauges	
		H02	Temperature Gauges	Mechanical, Electronic Pressure gauges
		H03	Temperature Switches	Mechanical, Electronic Pressure Switches
		H04	Pressure Switches	Mechanical, Electronic Temp Gauges
		H05	Pressure Gauges	Mechanical, Electronic Temperature Switches
J	Control Systems	J01	HMI	
		J02	DCS	DCS Hardware, Software, Project & Operations Services
		J03	PLC	PLC Hardware, Software, Project & Operations Services
		J04	SCADA	
		J05	Remote I/O	
K	Data Acquisition	K01	PC Front Ends DAQ	
		K02	Data Loggers DAQ	
		K03	Standalone DAQ Systems	
		K04	Recorders	
M	Control Valves	M01	Valves	Sliding Stem, Rotary, Other Control Valves
		M02	Positioners	Pneumatic, Electric Positioners
		M03	Actuators	Pneumatic, Electric Actuators
N	F&G Detection Systems	N01	Combustible Gas Detectors	IR-Open Path, IR-Point, Catalytic Gas Detectors
		N02	Toxic Gas Detectors	SS MOS, Echem, Other Gas Detectors
		N03	IR/UV Flame Detectors	
		N04	F&G Systems	
P	Safety Instrumented Systems	P01	SIS Pressure	
		P02	SIS Temperature	
		P03	Other SIS Inst	Safety Inst Sys Flow, Level, Other
		P04	SIS-ESD Systems	

PLF Category Code	PLF Category	PLF Code	Client selects PLF Products Lines*	*Some PLF Product Lines are the Sum of the Market Value for the following Products
Q	Gas Analytical	Q01	Photometers	Non-Dispersive, Filter, Tunable Diode Laser Photometers
		Q02	NIR Spectrometer	NIR, FT-NIR Spectrometer
		Q03	Other Spectrometers	FT-IR, Raman, Open Path, Mass Spectroscopy
		Q04	Oxygen	ZrO2, Paramagnetic, Echem Gaseous Oxygen
		Q05	Chromatography	Gas Chromatographs, BTU Analyzers
		Q06	Moisture	NIR, Capacitance, AIO2, P2O5/Quartz, Mirror Moisture
		Q07	Other Gas Analyzers	Opacity/Dust Photometers, Chemi, FID, T/C Analyzers
R	Liquid Analytical	R01	pH/ORP Inst./Sensors	PH/ORP Sensors, Instruments
		R02	Conductivity Inst./Sensors	Conductivity Sensors, Instruments
		R03	DO Inst./Sensors	DO Sensors, Instruments
		R04	Other Echem Inst./Sensors	Other Echem Sensors, Instruments
		R05	TOC/Wet Chem	Water Analyzers, TOC
		R06	Density/Viscosity	Mech./Coriolis/Nuclear/uW Density and Viscosity Meters
		R07	Other Liquid Analyzers	Turbidity, Refractometry, Color Meters
S	Metering Pumps (1) (2)	S01	Diaphragm Metering Pumps	
		S02	Piston Metering Pumps	
		S03	Other Metering Pumps	Syringe, Rotary, and Other Pump Types
T	Inst. & Valve Service (2)	T01	Field Service	
		T02	Factory Repair	
		T03	Remanufacture	
(1) Does not include water treatment chemical dosing pumps, analytical controllers				
(2) Not provided in MCAA Forecast Report				

Industry Coverage

Industries included in each Product Line Forecast

Oil & Gas	Electric Utilities
Petroleum Refining	Municipal Water & Wastewater
Chemicals	Mining
Pharmaceutical	Primary Metals
Food & Beverage	Cement
Pulp & Paper	All Other



Terms of Use

Calendar Time: Projects are initiated on the Monday following the receipt of the initial payment and project authorization. Proposed calendar time excludes the weeks of major holidays such as Thanksgiving, New Years, Independence Day, etc.

Disclaimer: The outcome of any Global Automation Research LLC Consulting Activity such as, but not limited to, Market Assessments, ReMaP™ Assessments, Price Diagnostics Assessments, Market Opportunity Briefings, etc. represents our interpretation and analysis of information generally available to the public or specifically released by responsible persons in the subject field. It does not contain information provided us in confidence by current or past clients. We believe that our sources are reliable; however, we accept no liability associated with the use or application of this information.

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Proprietary Product: The Project Deliverable of any Global Automation Research LLC Consulting Activity constitutes the entirety of its obligation. Client agrees that no disclosure will be required of: (1) data and information contained in any Global Automation Research LLC physical and electronic databases, (2) methods and techniques of analysis, work practices, etc. or (3) any additional proprietary or non-proprietary information of Global Automation Research LLC, its Clients, and/or its subcontractors.

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ADDITIONAL GLOBAL AUTOMATION RESEARCH LLC RESOURCES

Market Opportunity Briefing

The Global Automation Research LLC Market Opportunity Briefing provides a new worldwide perspective on the Process Instrumentation and Automation (PI&A) marketplace. It draws on our Global PI&A Market Information Database to meet client needs for market information and industry trends across multiple product and industry segments. Some of the client objectives recently addressed by custom Market Opportunity Briefings include:

- Periodic product market information updates to support annual performance assessment and new-year goal setting
- Market information and trends to support the consideration of proposed strategic expansions of product lines, served markets or geographic coverage
- Assessment and selection of product market segments to meet strategic acquisition plans
- Orientation of new management to the PI&A market size, forecasted growth, segmentation, and key product technology, end user and supplier trends
- Identification of new market opportunities for new or existing product lines in selected industry or geographic segments

A Market Opportunity Briefing is not another generic market report. It is a presentation of client selected market information conducted by a Principal of Global Automation Research LLC. The briefing is focused on the product categories, industry segments and geographic regions of interest to you. As an interactive review, there are opportunities for questions and extended discussions throughout the presentation. All data presented, and other supporting information, is provided to the Client in an Excel workbook.

The scope of the briefing is defined by the client. First the specific PI&A products of interest are selected, followed by target industries and, finally, the geographic regions of interest (e.g. Global, USA, Europe, BRIC, etc).

Market Assessment - In Depth Market Research and Analysis

The Global Automation Research LLC Market Assessment is an in-depth assessment and analysis of a client-specific market segment(s) that goes beyond

the scope of a Market Opportunity Briefing. A Market Assessment is closest to a traditional “custom market research project”, but Global Automation Research LLC brings unique industry and product experience, advanced research methods, broad industry and regional coverage and an unparalleled focus on the process instrumentation and automation (PI&A) market. Market Assessments address a broad range of Client research and analysis requirements. However, most fall into four categories. See our Representative Proprietary Projects list below.

Product Market Assessments. A Product Market Assessment is an in-depth consideration of a PI&A product or a group related of PI&A products. Product Market Assessments can cover market size and forecast estimates by product, industry, and geographic region, but typically extend the scope to include topics such as segmentation by application, enclosure type, area classification, competing technologies, data communications options, and many others.

New Product/Technology Assessments. The development of a new PI&A product, whether a product line extension or incorporating a new technology, requires very specific, knowledgeable, research and analysis to address a number of important issues.

Industry Assessment. An industry assessment considers the specific nature of demand for a PI&A product(s) in one or more industry segments. Here, the focus is on industry characteristics including market structure (sales channels, competitor market position, etc.), the participation and influence of EPCs, System Integrators, and OEMs, industry specific product attributes, key trends in end user demand for PI&A products, and estimates of market size and forecasted growth by industry segment, by product, and by region.

Acquisition Strategic Services

Global Automation Research LLC has extensive experience in providing Clients with strategic acquisition support. Acquisition of an entire company, a product line, or a new technology involves unique challenges the acquiring company. Important considerations can include the satisfaction of key customers with the company, realistic assessment market size, forecasted growth and key trends claimed by the seller, and viability of claimed technology advantages to meet or exceed current competing products.

We initiate the process with our unique Market Opportunity Briefing covering the market segments of interest. This establishes the ‘fit’ with your business by



providing a detailed PI&A market perspective to establish a good basis for future business, market, and product planning.

Working with you, we identify candidate companies, explore current their situation, and review preliminary data with you to create a short list of target companies. If needed, we can make initial contact with target companies owners and/or decision makers and assist in on-going discussions with the target company. On selection of a candidate, we can provide thorough market due diligence, competitive situation, and customer satisfaction assessments.

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