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A Proposal for a Market Research Study on the Worldwide Pressure Transmitter Market

Flow Research has proposed a new market study on the worldwide pressure transmitter market. The study will be conducted by Flow Research, and would have as a primary goal determining the size of the pressure transmitter market in 2006. In addition, forecasts through 2011 will be included. For more details on the study, go to www.worldpressure.com.

The study has multiple purposes:

- To determine worldwide market size and market shares for pressure transmitters in 2006
- To forecast market growth for all types of pressure transmitters through 2011
- To identify industries and applications where pressure transmitters are used, and to identify growth areas
- To provide a product analysis for the main companies selling into the pressure transmitter market
- To provide strategies to manufacturers for selling into the pressure transmitter market
- To provide company profiles of the main suppliers of pressure transmitters.

Rationale for study

Flow Research last published a worldwide pressure transmitter study in January 2004. Flow Research has recently completed a study called **The World Market for DP Flowmeters and Primary Elements**. As part of the research for this study, we obtained worldwide numbers for the pressure transmitter market that lead us to believe that this market has increased substantially since the last study. Some of this growth is no doubt due to growth in the oil and gas and other energy markets. We believe that this is an optimal time to quantify this growth, and to take another in-depth look at what appears to be a rapidly expanding market.

This study will not include pressure transducers. Pressure transducers are generally lower in cost and smaller than pressure transmitters, and are typically not used in the process industries. They typically have loose wires at one end, and do not perform at the same level as pressure

transmitters. Pressure transducers often have a millivolt output, while pressure transmitters have a 4-20 mA output or a digital output.

The proposed segmentation for this study is as follows.

The study will be divided into the following regions:

- North America
- Europe, including Central Europe and FSU
- Middle East and Africa
- Japan
- China
- Asia without China and Japan
- Latin America and Other

We are proposing to add China due to the increased amount of interest in this region. Please let us know if you would like to see data on China included. We are separating out ME and Africa into a single region because some companies prefer to see this region separately. In cases where an engineering company orders products to be shipped into a different geographic region, we plan to count the destination region as the geographic location.

Pressure Transmitters by Type

There are four kinds of pressure transmitters:

- Multivariable (MV) pressure transmitters that measure two or more process variables in a single device. These are usually pressure and temperature.
- Differential pressure (DP) transmitters measure a difference in pressure upstream and downstream of a constriction in the pipe, called a primary element.
- Gage pressure transmitters measure an amount of pressure that includes atmospheric pressure.
- Absolute pressure transmitters measure an amount of pressure that does not include atmospheric pressure.

Presesure transmitters are further subdivided according to whether they are used to measure flow or level.

Pressure Transmitters by Fluid Type

Pressure transmitters are segmented in this study according to fluid type:

- Liquid
- Steam
- Gas

Pressure Transmitters by Mounting Type

Pressure transmitters are segmented according to the mounting type. They are distinguished by whether they are shipped with any of the following mounting accessories, or with none:

- Remote seal
- Manifolds only
- Primary element assemblies
- Other
- None of the above

Pressure Transmitters by Smart vs. Conventional

Pressure transmitters are also segmented as follows:

- Smart
- Analog (conventional)
- Low Cost

Pressure Transmitters by Communication Protocol

Pressure transmitters are segmented by the following protocols:

- HART
- Foundation Fieldbus
- Profibus
- Modbus
- Proprietary Protocols
- Other

Pressure Transmitters by Industry

Pressure transmitters are used mainly in the process industries. We propose to include the following industries in this study:

- Oil & gas production, transportation, and distribution
- Refining
- Chemical
- Pharmaceutical
- Food & Beverage
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater

- Other

Pressure Transmitters by Sales Channels

The pressure transmitter market will be segmented according to the following sales channels:

- Direct Sales
- Independent Representatives
- Distributors
- E-Business

Pressure Transmitters by Customer Type

The pressure transmitter market will be segmented according to the following customer types:

- End-Users
- OEMs
- Systems Integrators
- Engineers/Consultants

Publication Date

The target date for publication of this study is July 2007.

Founding Sponsorship

We are offering the opportunity for companies to become Founding Sponsors for this study. Benefits of being a Founding Sponsor include being able to participate in determining study scope and direction, being sent regular updates on study progress, and receiving a favorable discount pricing package. Enclosed please find more details about the Founding Sponsor package. If you have any additional comments on the segmentation, please let us know.

Thank you in advance for your input, and we hope to hear from you! You can find the latest information about the pressure transmitter study at our dedicated pressure website, which is www.worldpressure.com.

Background

Dr. Jesse Yoder is President of Flow Research Inc., a company he founded in 1998. Dr. Yoder has 20 years' experience as a writer and analyst in process control and instrumentation. Since 1990, he has written 70 market research studies, most of them in the area of flow and instrumentation. Some of the recent and currently scheduled Flow Research studies are as follows:

The World Market for Pressure Transmitters, 2nd Edition (May 2007)

The World Market for Steam Flow Measurement (September 2007)
The World Market for DP Flowmeters and Primary Elements (January 2007)
The Market for Temperature Transmitters in the Americas, 2nd Edition (November 2007)
The Market for Temperature Sensors in the Americas, 2nd Edition (May 2006)
Worldwide Survey of Flowmeter Users, 2nd Edition (January 2006)
The World Market for Vortex Flowmeters, 3rd Edition (March 2006)
The Global Market for Magnetic Flowmeters, 3rd Edition (September 2005)
The Market for Temperature Transmitters in the Americas, 2nd Edition (November 2006)
Volume I: The World Market for Coriolis Flowmeters, 3rd Edition (October 2007)
Volume III: The World Market for Ultrasonic Flowmeters, 3rd Edition (October 2007)
Volume VII: The World Market for Positive Displacement Flowmeters (2002)
Volume VIII: The World Market for Turbine Flowmeters (2002)
Volume X: The World Market for Flowmeters (includes all flow technologies) (2/2008)
Volume XI: The World Market for Gas Flow Measurement (September 2004)

These studies are described at http://www.flowresearch.com/flow.htm

Dr. Yoder has also written more than 70 articles on flow and instrumentation for trade journals. Links to many of these can be found at http://www.flowresearch.com/articles.htm.

Norm Weeks, Market Analyst, joined Flow Research in November 2004 after a 24-year stint with Verizon. At Verizon, Norm specialized in creating innovative customer solutions, product management, and product marketing. He is now a fulltime market analyst for Flow Research, and has already completed several studies.

Belinda Burum, Vice President and Editor, has worked in high tech for 16 years as a technical writer and marketing communications manager. She joined the company in 2002, and has since then worked on many projects. She is a very talented writer, and has a strong customer focus. In addition to her work on market studies, Belinda is serving as associate editor of the **Market Barometer** and the **Energy Monitor**.

Besides writing and publishing studies of this type, Flow Research specializes in user surveys that include a detailed analysis of customer perceptions. In addition, Flow Research provides quarterly updates on the flow and energy industries in the **Market Barometer** and the **Energy Monitor**. The **Energy Monitor** analyzes the current state of the oil & gas, refining, power, and renewables industries, and the implications for instrumentation suppliers. Both reports are part of the Worldflow Monitoring Service. More details are available at www.worldflow.com. For more information on Flow Research, please visit our website at www.flowresearch.com.