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A Proposal for a Market Research Study on the Worldwide Flowmeter Market

Flow Research is proposing a new market study on the worldwide flowmeter market. The study will be conducted by Flow Research. The primary goal is to determine the size of the worldwide flowmeter market in 2007. In addition, forecasts through 2012 will be included. The study will be called **The World Market for Flowmeters, 2nd Edition**.

The View from 20,000 Feet

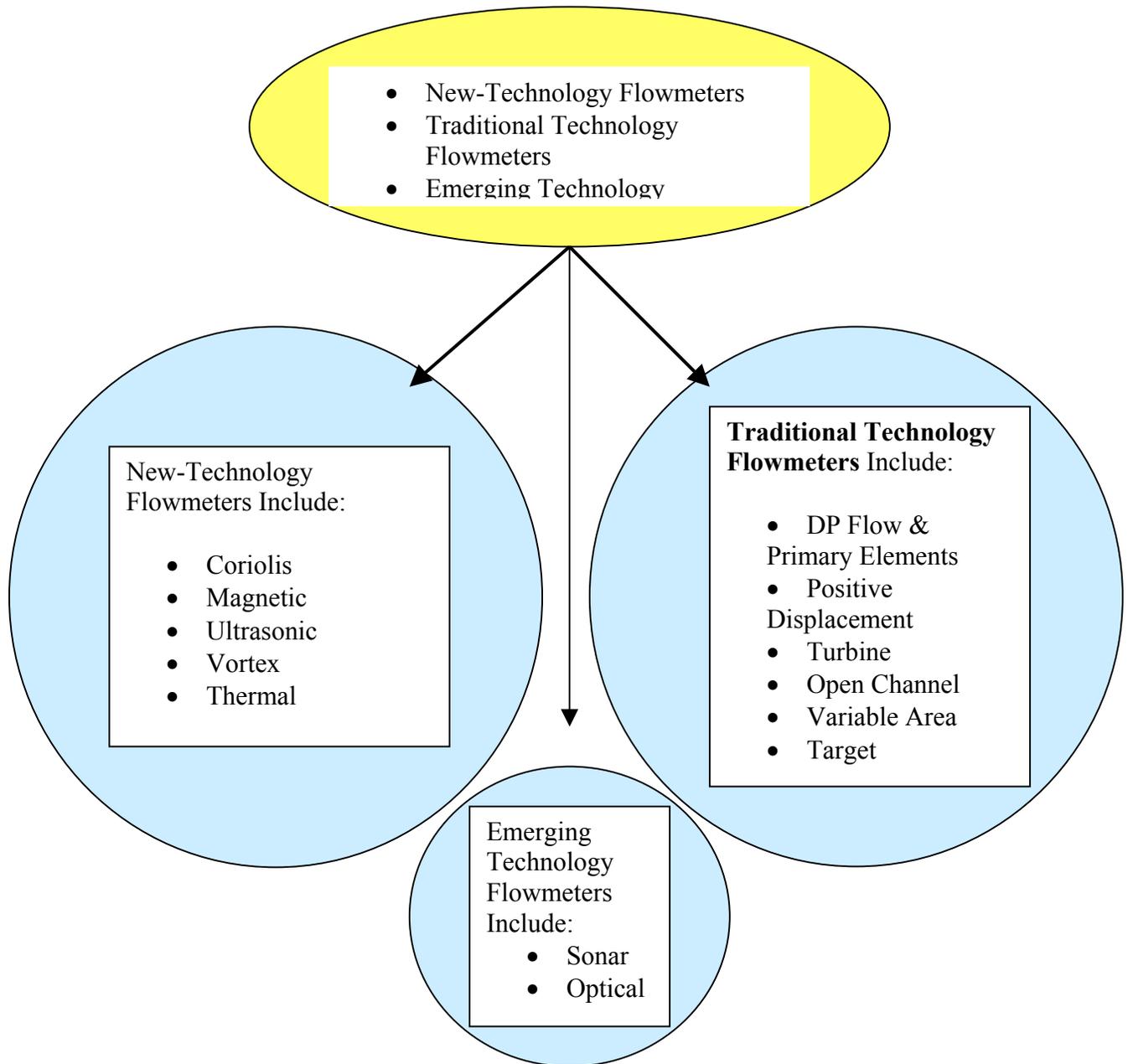


The study has multiple purposes:

- To determine worldwide market size and market shares for all types of flowmeters in 2007
 - To forecast market growth for all types of flowmeters through 2012
 - To determine the breakout of liquid, gas, and steam for individual flow technologies
 - To provide a product analysis for the main companies selling into the flowmeter market
- To provide strategies to manufacturers for selling into the flowmeter market
 - To provide company profiles of the main suppliers of flowmeters.

One main goal of this study is to determine the size of the flowmeter market worldwide in 2007. We will approach this subject from the bottom up by analyzing the market size for each type of flowmeter, and then totaling these into the size of the entire flowmeter market.

This study divides the flowmeter market by technology into three types:



Flow Research has conducted or is conducting in-depth individual market studies on many of these flow technologies, including Coriolis, magnetic, ultrasonic, vortex, and DP flow and primary elements. We already have up-to-date data for most of these technologies. We will obtain the updated information for the remaining technologies, including positive displacement and turbine flowmeters. The result will be a completely up-to-date analysis of the worldwide flowmeter market for 2007.

The last time we performed such a comprehensive analysis was in February 2003, for the first edition of this study. That study was a great success, and we expect even better results for the second edition.

Background of Study

The worldwide flowmeter market has changed substantially since the first edition of this study was published in 2003. While 2003 was a down year for many companies, the flowmeter market began improving in the fourth quarter of that year. The last three years, 2004, 2005, and 2006, have been years of significant growth for the worldwide flowmeter market. Growth in the energy markets and demand for instrumentation from China and India are some of the reasons for this growth. In addition, suppliers have released a steady stream of new products, especially for new-technology flowmeters. It is time to take a new look at the worldwide flowmeter market in 2007, to determine the amount of growth that has occurred, and to see how the different technologies stack up against each other.

Rationale for Study

Since completing our first worldwide flowmeter market study in 2003, we have been following this market very closely. Many developments have been described in our quarterly report, the **Market Barometer**. Each issue of the Market Barometer includes an update on the market for each type of flowmeter. This new study builds on the knowledge we have gained over the years, since the 2003 edition, but it is a completely new look at this market. For more information on the Market Barometer, go to www.worldflow.com.

Key Issues Addressed

This study will address the key issues in the worldwide flowmeter market, including:

- Growth in the ultrasonic flowmeter market, especially the market for custody transfer of natural gas
- Continued growth in the Coriolis flowmeter market
- Comparison of the DP flowmeter and primary elements market to other flow markets
- The impact of the expanding oil & gas and energy industries on the flowmeter market
- The effect of growth in China, India, and other developing countries on the worldwide flowmeter market
- Continued expansion of the magnetic and vortex flowmeter markets
- The impact of new-technology flowmeters on the positive displacement and turbine flowmeter markets
- Mergers and acquisitions in the worldwide flowmeter market
- The impact of new standards, such as the new American Petroleum Institute (API) standard for vortex flowmeters used in custody transfer

Proposed Segmentation

The proposed segmentation for this study is as follows.

Geographic Segmentation:

- North America
- Europe, including Central Europe and FSU
- Japan
- Asia without Japan
- Rest of World (Latin America, Africa, Middle East)

New-Technology Flowmeters

Coriolis Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Bent Tube vs. Straight Tube
- Liquid, Steam, and Gas
- Market Shares

Magnetic Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Wafer, Flanged, and Insertion
- Market Shares

Ultrasonic Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Transit Time, Doppler, and Hybrid
- Liquid, Steam, and Gas
- Market Shares

Vortex Flowmeters



- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Multivariable, Smart, and Conventional
- Liquid, Steam, and Gas
- Market Shares

Thermal Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Liquid and Gas
- Market Shares

What's in this for my company?

- See the emerging applications and where the growth is.
- Understand world and regional markets
- Get to know your real competition
- Learn what other suppliers manufacture, where, and for whom
- The best information creates the best decisions

Traditional Technology Flowmeters

DP Flow and Primary Elements

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- DP Flow Transmitters and Primary Elements
- Liquid, Steam, and Gas
- Market Shares

Positive Displacement Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Water, Gas, Oil, Industrial Liquids
- Market Shares

Turbine Flowmeters

- Product Analysis



- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Water, Gas, Oil, Industrial Liquids, Steam
- Market Shares

Open Channel Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Market Shares

Variable Area Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Liquid, Gas, and Steam
- Market Shares

Target Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Liquid, Gas, and Steam
- Market Shares

Emerging Technology Flowmeters

Sonar Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Liquid and Gas
- Market Shares



Optical Flowmeters

- Product Analysis
- Geographic Breakout Worldwide
- Market Size in Dollars and Units
- Liquid, Gas, and Steam
- Market Shares

Strategies

Company Profiles

Publication Date

The target date for publication of this study is February 2008.

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. The Founding Sponsor program is explained on page nine. We hope you will decide to become a Founding Sponsor for this study.

Please review the above segmentation and let us know if there is any additional segmentation you would like to see, or if you would like to propose changes to the existing segmentation.

Thank you in advance for your input, and we hope to hear from you!

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 more than 100 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:

How will the Founding Sponsor Program help me?

- You can have your specific data requirements included in the study
- You help determine the scope and final objectives
- You receive periodic updates as the research progresses
- You are among the first to receive final study results
- You receive favorable pricing and other purchase terms

[Volume I: The World Market for Coriolis Flowmeters, 3rd Edition](#) (2007)
[Volume II: The Global Market for Magnetic Flowmeters, 3rd Edition](#) (September 2005)
[Volume III: The World Market for Ultrasonic Flowmeters, 3rd Edition](#) (2007)
[Volume IV: The World Market for Vortex Flowmeters, 3rd Edition](#) (March 2006)
[Volume V: The World Market for DP Flowmeters and Primary Elements](#) (January 2007)
[Volume VI: Worldwide Survey of Flowmeter Users, 2nd Edition](#) (January 2006)
[Volume VII: The World Market for Positive Displacement Flowmeters](#) (2002)
[Volume VIII: The World Market for Turbine Flowmeters](#) (2002)
[Volume IX: The World Market for Pressure Transmitters, 2nd Edition](#) (July 2007)
[Volume X: The World Market for Flowmeters \(includes all flow technologies\)](#) (2008)
[Volume XI: The World Market for Gas Flow Measurement](#) (September 2004)
[Volume XII: The World Market for Steam Flow Measurement](#) (March 2007)
[Volume XIII: The World Market for Mass Flow Controllers](#) (September 2007)
[The Market for Temperature Sensors in the Americas, 2nd Edition](#) (May 2006)
[The Market for Temperature Transmitters in the Americas, 2nd Edition](#) (November 2006)

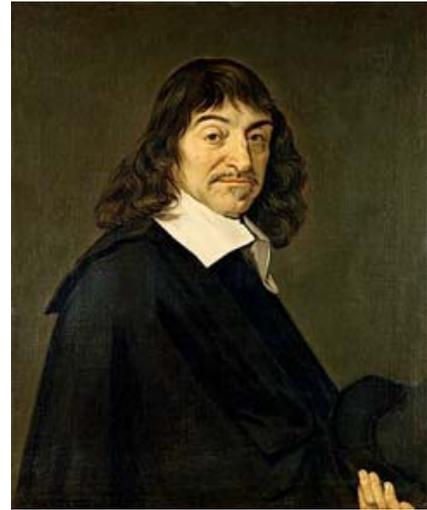
These studies are described at <http://www.flowresearch.com/flow.htm>

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 supplier. 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.



René Descartes

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The Flow Research Founding Sponsor Program

To produce studies that most closely match our clients' needs, Flow Research instituted the Founding Sponsor Program. This program enables companies who wish to participate at a high level in a study's research to influence its scope and segmentation. In addition, Founding Sponsors receive regular updates from Flow Research on study progress, and receive a significant discount on the standard retail of the study.

Procedure: Early in the planning phase of a study, Founding Sponsors receive a proposal that includes the proposed segmentation. Founding Sponsors can propose additional segmentation, and can also suggest changes to the proposed segmentation. While the decision to adopt particular segmentation ultimately lies with Flow Research, and is based on input from all contributors, we will do our best to accommodate the specific needs of each of our clients.

During the research phase of a study, Flow Research will issue regular reports that provide updates on the progress of the research. These reports will be sent to Founding Sponsors, who are then invited to provide any additional input or comments into the study.

Being a Founding Sponsor requires making an early commitment to purchase the study. However, in return, Founding Sponsors receive a significant discount off the regular price of the study. Payment can be made either in one amount at the beginning of the study, or split into two, with the second payment due upon delivery of the study.

For additional details, or to find out how the Founding Sponsor program applies to any particular study, please contact Flow Research. We look forward to working with you!

If you have any questions about the Founding Sponsor program, please contact Norm Weeks at (781) 245-3200, or norm@flowresearch.com.

The World Market for Flowmeters, 2nd Edition



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Why Flow Research?

- We specialize in flowmeter markets and technologies
- We have researched all flowmeter types
- We study suppliers, distributors, and end-users
- Our worldwide network of contacts provides a unique perspective
- Our mission is to supply the data to help your business succeed