

The World Market for Liquid Analytical Instruments

Proposal



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A Proposal for a Market Research Study on The World Market for Liquid Analytical Instruments

Flow Research is conducting a new market study on the worldwide market in liquid analytical instruments used in process control. The primary goal of this study is to determine the size of this liquid analytical instruments market in 2009. Forecasts through 2014 will be included. The study is called **The World Market for Liquid Analytical Instruments**.

The study has multiple purposes:

- To determine the worldwide market size for liquid analytical instruments in 2009, and to provide this data for individual geographic regions
- To determine worldwide market shares for liquid analytical instruments in 2009, and to provide this data for individual geographic regions
- To forecast market growth through 2014 for all of the significant technology types used in this market
- To identify the process industries and core applications where liquid analytical instruments are used
- To identify market growth sectors
- To provide a product analysis for the main companies selling into the liquid analytical instruments market
- To provide product, feature, and technical descriptions of liquid analytical instruments supplied into this market
- To determine average selling prices for liquid analytical instruments by technology type
- To provide strategies to manufacturers for selling into the liquid analytical instruments market
- To provide company profiles of the main suppliers into the liquid analytical instruments market
- To provide product shipment data by distribution channel and customer type
- And much more

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

Rationale for Study

Flow Research has focused exclusively on the study of process control technologies and instrumentation since its inception. Over the last twenty years, our research has resulted in the publication of more than 100 comprehensive market studies that have covered the following subject areas: all fourteen existing flowmeter technologies, temperature sensors and transmitters, pressure sensors and transmitters, and API valves. We have also conducted studies of specific flow applications such as gas flow, steam flow, water, and wastewater. Liquid analytical instrumentation is an increasingly critical component of modern industrial process management, and Flow Research is extremely excited about thoroughly researching its status today and to then be able to forecast its future over the next five years.

Flow Research uses the perspective of all three segments – manufacturer, distributor/representative, and end-user – when analyzing target markets. We maintain regular communication with all three of these groups in order to be best positioned to note both subtle and significant shifts in technologies or buying patterns. We also use this steady flow of new information in support of our two quarterly publications, *Market Barometer* and *Energy Monitor*. (see www.worldflow.com).

We believe this market is expanding for several reasons, and is also undergoing a fundamental evolution at the same time as suppliers move their technology from the laboratory to the process environment. One result of this trend is that real-time liquid analytic data is becoming increasingly available to end-users. We believe that this is an optimal time to quantify the growth in the liquid analytical measurements used in process control.

The Founding Sponsor Program

Here at Flow Research, our primary focus is to develop and to make available to you the data which will help your business make informed decisions. The best decisions are most often made with the best information being available at the right time. Thus, we believe it is vital to know what information we must develop in order to best assist our clients, and to continually update this information to maximize its usefulness.

The above is the basic idea behind the *Founding Sponsor Program*. Founding Sponsors have the best opportunity to influence the actual areas of research we will cover in each study. Founding Sponsors receive periodic progress updates as a study is completed. And, Founding Sponsors also receive a sizable discount on the study.

To learn more about the Founding Sponsor Program, please review the enclosure.

Key Issues to be Addressed in the Study

Liquid analytical measurement applications and their associated revenues have grown significantly during the last several years. A major driver of this growth worldwide has been the expansion in demand for finer analyses of process variables related to enhanced industrial process quality targets, more stringent environmental compliance standards, and technology advances. There is also a major trend moving laboratory applications to the real-time process itself. And there has been significant new capital projects growth in large regional economies such as India and China during this time as well.

Our research intends to determine where growth is occurring - and where it is not - in terms of application, industry, and geography. The results of this study will inform you about where the highest returns should be expected to occur through 2014 in these three basic market segments.

The box below highlights some of the areas which you may find of greatest interest, and which will comprise the basic building blocks of this study:

Key Issues Addressed

This study will address the key issues in the liquid analytical instrumentation market, including:

- What is the technological state of the market today?
- What applications are growing – and which are not?
- What regions of the world hold the greatest growth prospects – and why?
- Are there new competing technologies to the traditional devices – and what are they?
- Are there new liquid analytical measurement standards that must be understood?
- Which industries represent the greatest growth potential – and why?
- What are the features that end-users are looking for in liquid analytical devices?

The preliminary basic research segmentation is listed on the following pages.

Proposed Study Segmentation

Geographic Regions

- North America
- Europe, including Central Europe and FSU
- Japan
- China
- Asia without Japan/China
- Rest of World

Technology Types

- Membranes
- Optical Sensors / Infrared (Near-, Mid-)
- Electrochemistry
- Chemicals (Reagents)
- Mass Spectrometry
- Fourier Transform Infrared

Application Areas

- Chlorine / Chlorides
- Turbidity
- pH / ORP
- Conductivity / Resistivity
- Dissolved Oxygen / Oxygen Analysis
- Nutrients
- Organic Carbon / Total Organic Carbon
- Metals

Measurement Scope

- Single Parameter
- Multi-Parameter

Product Types

- Sensors
- Transmitters
- Integrated Systems

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

Proposed Study Segmentation *(continued)*

Industries

- Oil and Gas (Production / Refining)
- Chemical
- Food & Beverage
- Pharmaceutical
- Pulp & Paper
- Metals & Mining
- Power Generation
- Water
- Wastewater
- Other

Supplier Market Size and Market Shares

- Provided for each technology type
- Forecast information through 2014

Sales by Distribution Channel

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

Sales by Customer Type

- End-Users
- OEMs
- Systems Integrators
- Engineering and Consulting Firms

Strategies for Success

- Discussion of market forces at work
- Strategic action perspectives
- Real world success stories

+ Average Selling Prices by geographic region

+ Factors contributing to and limiting growth

And more

Communication Protocols:

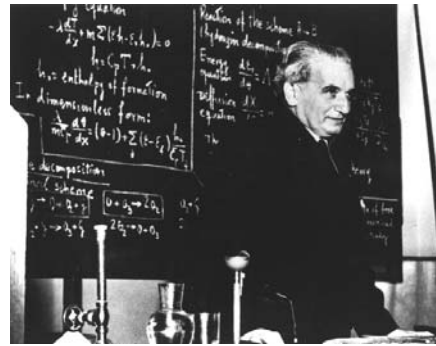
- HART®
- Ethernet IP
- Foundation Fieldbus ®
- Modbus
- TCP/IP
- Proprietary
- Wireless
- Other

Comprehensive Company Profiles and Product Analyses will include the following firms:

- ABB
- Emerson Process Management
- Endress+Hauser
- Foxboro/Invensys
- GE Sensing
- Hach
- Honeywell
- Mettler Toledo
- Yokogawa
- And others



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Theodore von Karman

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 regular price 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 would help your firm, 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 [1] 781 245-3200, or norm@flowresearch.com.

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