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Dear Marketing Manager:

I am very pleased to let you know about our new study, *The Market for Temperature Transmitters in the Americas, Second Edition*. The many replies we received to our initial inquiries were instrumental in creating the study's final scope and structure. Overall, the response was very strongly in favor of the project, and hence we are even more excited about its completion.

We've seen an emerging need for this study from several points of view. Our original study of the subject was published in 2000, and it has been several years since either Flow Research or any other research firm has taken a serious look at the subject. Our own clientele and others have been asking us when we will do the next edition. The time seems right.

The original study found a shift from analog temperature transmitters to smart and programmable transmitters. High-tier transmitters have enhanced accuracy, and many can accept more than one type of sensor. Other trends were also identified at the time. Now, there is a set of questions surrounding the issues of whether these trends have continued, and what new trends may have commenced within the transmitters market during the last several years. Another question of particular interest is the impact that new Asian suppliers may be having on the Americas market. We have seen their influence within other technology sectors, and we expect to see it here as well.

For these and other reasons we see a real demand for the *Second Edition*. Our plan is to begin the actual research phase of the project this month and to publish in November, 2005. Again, your input has been of genuine assistance in creating the study's final research scope.

On your response form you had expressed interest in purchasing the study. For this reason, we want to make you aware of both the precise objective and final outline of the study. We also want to make you aware of the purchase options we are making available.

**Flow Research, Inc** 27 Water Street Wakefield, MA 01880 United States  
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We have enclosed material which covers the rationale for the study, the study's research scope and segments, key issues to be addressed, as well as an abbreviated Table of Contents. All of this is to give you ample descriptions of the final version of the report. Textual matter will be clear and concise. Following our established format, statistical analyses, market segmentations, and other numerical data will be richly illustrated in high-quality graphical representations for ease of review and later reference. The study will be delivered in two basic ways: 1) as a full color, spiral bound, hard copy text; and 2) in PDF format in either electronic or CD-ROM versions (choice determined by client preference).

We believe the available purchase options offer flexibility, value, and reward early commitment. Our practice has always been to offer a significant discount from the retail price for those who purchase prior to publication. We continue that practice here. In addition, and for the first time, we are bundling the CD-ROM version of the study with the bound text for pre-subscribers. The CD-ROM version has a retail value of \$450 - our usual price - but is offered at no additional cost to those who make the early decision. Please refer to the enclosed pricing sheet for details.

In closing, we thank you again for your expression of interest in this study. We believe it is needed research at the right time. It appears that you may agree.

Best regards,

Dr. Jesse Yoder,  
President  
Flow Research, Inc.

## EZ Order Form

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It's easy to order *The Market for Temperature Transmitters in the Americas, Second Edition*. To do so, you can fill out the bottom of this form and email, fax, or post it to Flow Research, or simply give us a call. *No matter which option you choose, we appreciate your business!*

Name: _____ Title: _____ Company: _____ Email: _____ <input type="checkbox"/> Check Enclosed    Amount: \$ _____ <input type="checkbox"/> Purchase Order    PO#: _____ <input type="checkbox"/> Bill my company Tel: _____ Fax: _____	Street: _____ City: _____ State: _____ ZIP: _____ Country: _____ <input type="checkbox"/> VISA <input type="checkbox"/> Master Card Account Number: _____ Expiration Date: _____ Name on Card: _____ Signature: _____
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# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **Rationale for Study**

In the last study, we found a shift from analog temperature transmitters towards smart and programmable transmitters. One objective of the study is to see if the shift towards smart and programmable temperature transmitters has continued over the past few years and, if it has, at what rate. High-tier transmitters have enhanced accuracy, and many can accept more than one type of sensor. The last study found significant growth in high-tier transmitters. We propose to determine if this trend has continued in the past few years.

It has been several years since anyone has taken a serious look at the temperature transmitter market. During this time, supplier consolidation has occurred, and temperature transmitter technology has continued to evolve. Flow Research intends to take a new look at the temperature transmitter market. We plan to determine market sizes by type of temperature transmitter, determine market shares, and identify growth trends. With the background of the earlier study available as a baseline, we expect to accurately describe how the market has changed over the past five years, and to realistically describe what the market will look like in the next several years to come..

The objectives of the study will be achieved by providing a comprehensive view of the temperature transmitters market from the perspectives of supply, distribution, and product utilization. Key findings will be realized through the use of structured in-depth supplier interviews, internet surveys and reviews, and secondary research of technical resources. An end-user survey will supplement the core study.

## **Scope**

The data developed in this study will include total revenues and unit sales by type of temperature transmitter, and average selling prices. Other data will include the following:

- Market shares for the suppliers of each temperature transmitter type
- Detailed product descriptions by supplier
- Growth forecasts for each type of temperature transmitter (through 2010).
- Growth forecasts for all temperature transmitters for each industry
- Market shares for each type of temperature transmitter in the Americas
- Temperature transmitter sales by distribution channel
- Temperature transmitter sales by customer type
- Profiles of all supplier companies
- Strategies for success

# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **Study Segments**

### **Temperature Transmitter Types**

- High Tier
- Smart
- Programmable
- Analog
- Low Cost

### **Temperature Transmitter Mounting Types**

- Rail-mounted
- Headmounted
- Fieldmounted

### **Communication Protocols**

- HART
- Proprietary Digital
- Foundation Fieldbus
- Profibus
- Modbus
- Serial
- Others

### **Market Sizes**

- Breakdowns by technology type
- Breakdowns by geographic region

### **Market Shares**

- By technology type by supplier
- By supplier by geography
- By transmitter type by industry

### **Market Forecasts**

- Total for all technologies included in study (in US Dollars)
- By geographic region (in US Dollars and number of units)
- By technology (in US Dollars and number of units)

# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **Study Segments** (continued)

### **Geographic Regions**

- United States
- Canada
- Latin America (Central & South America)

### **Industries and Vertical Markets**

- Oil & Gas Exploration, Production, and Transportation
- Oil & Gas Refining
- Chemical
- Pharmaceutical
- Food Processing
- Pulp & Paper
- Metals & Mining
- Power
- Water & Wastewater
- Automotive
- Aerospace
- Heat Treating
- Plastics
- Food Transportation
- HVAC
- Textiles
- Electronics / Semiconductor
- Other

### **Total Transmitter Sales by Distribution Channel**

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

### **Total Transmitter Sales by Customer Type**

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

# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **Study Segments** (continued)

### **Company Profiles**

- Profiles of all identified manufacturers including contact information, product line(s), and other essential information

### **Strategies for Success**

- Discussions of market forces at work
- Strategic action perspectives
- Real world success strategies

## **Key Issues in this Study**

- Is the move from analog to smart and programmable temperature transmitters continuing?
- Is the growth of high-tier temperature transmitters continuing?
- What is the distribution of rail-mounted, headmounted, and fieldmounted temperature transmitters by geographic region?
- To what extent are low cost suppliers from China, India, and other countries penetrating the temperature transmitter market in the Americas and influencing prices?
- What consolidation has occurred in the industry? Will this continue?
- What trends are occurring with communication protocols? How quickly are the adoption rates for Foundation Fieldbus and Profibus temperature transmitters growing?
- What technology changes are occurring among temperature transmitter products?
- How quickly is e-business growing as a distribution channel?
- What features are end-users looking for in temperature transmitters?
- Are end-users switching from one type of temperature transmitter to another and, if so, why?

# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **TABLE OF CONTENTS** (abbreviated)

### **CHAPTER   SUBJECT**

#### **1      Executive Summary**

- Overview
- Methodology
- Methods for Industrial Temperature Measurement
- Growth Factors
- Shipments of Temperature Transmitters in the Americas by Geographic Region
- Temperature Transmitter Shipments in the Americas by Type
- Market Shares for Temperature Transmitters in the Americas
- OEM and End-User Surveys
- Strategic Perspectives

#### **2      Introduction**

- Overview
- Study Objectives
- Methodology
- Geographic Regions
- End-User Industries
- Temperature Transmitter Industry Structure
- Team History and Experience

#### **3      Temperature Product and Technology Analysis**

- Background of Industrial Temperature Measurement
- Historical Perspective on Temperature Measurement
- Temperature Scales
- Methods of Industrial Temperature Measurement
- Temperature Transmitter Technology

# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **CHAPTER SUBJECT (continued)**

- Low-Cost Temperature Transmitters
- Analog Temperature Transmitters
- Programmable Temperature Transmitters
- Smart Temperature Transmitters
- High-Tier Temperature Transmitters
- Fieldbus Temperature Transmitters
- Temperature Transmitter Product Analysis by Supplier

## **4 Temperature Transmitter Market Size and Forecast**

- Growth Factors for the Temperature Transmitter Market
- Shipments of Temperature Transmitters in the Americas by Geographic Region
- Temperature Transmitter Shipments in the Americas by Type
- Shipments of Temperature Transmitters in the USA by Type
- Shipments of Temperature Transmitters in Canada by Type
- Shipments of Temperature Transmitters in Latin America by Type
- Average Selling Price of Temperature Transmitters
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- Shipments of Programmable Transmitters by Geographic Region
- Shipments of Analog Transmitters by Geographic Region
- Shipments of Low-Cost Transmitters by Geographic Region
- Shipments of Temperature Transmitters by Mounting Type
- An Overview of Communication Protocols
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- Shipments of Temperature Transmitters by Industry
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# *The Market for Temperature Transmitters in the Americas, Second Edition*

## **CHAPTER SUBJECT (continued)**

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- Leading Suppliers of Temperature Transmitters in the Americas
- Market Shares for Temperature Transmitters in the Americas
- Market Shares for Temperature Transmitters by Geographic Region
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- Market Shares for the Leading Suppliers of Analog Temperature Suppliers
- Market Shares for the Leading Suppliers of Programmable Temperature Transmitters
- Market Shares for the Leading Suppliers of Smart Temperature Transmitters
- Market Shares for the Leading Suppliers of High-Tier Temperature Transmitters
- Market Shares by Industry

### **6 Strategies for Success**

- Overview
- *(Study findings will determine strategy elements)*
- Guidelines for Applying the Strategies

### **7 Company Profiles**

- Supplier Contact Information
- Supplier Product Lines

### **8 Exhibits**



## *User Perspectives Survey*

The purpose of the Survey is to capture the views of the market's end-users as another means of informing suppliers to the markets. Purchase decisions and application requirements and changes are best understood – and most easily anticipated – from the perspective of end-users. The Survey is offered as a supplement to the core sensor and transmitter studies, yet it is also an indispensable learning tool.

The industries sampled in the Survey will be drawn from those covered in the core studies. The pertinent questions regarding applications, product preferences, buying criteria, accuracy and safety considerations, purchase plans, sales channels, service levels, and supplier sources will all be asked and included in the results.

Below is a brief outline of the ***User Perspectives Survey*** for your review:

### Survey Segments

- Industry
- Company Size/Employee Totals
- Primary Applications
- Transmitters in Use (by quantities and by types)
- Purchase Factors and Supporting Rationales (with priority ratings)
- Unmet Needs from Products and Suppliers
- Descriptions of Ideal Transmitters
- Anticipated Changes in Applications
- Industry Growth Estimates (through 2008)
- Purchase Plans (through 2008)
- Size of Installed Base of Transmitters
- Communication Protocols in Use and Planned
- Requirements for Multivariable Temperature Transmitters (present, future)
- Redundancy Requirements
- Safety and Other Approvals
- Retrofit/Replacement/New Purchase Prospects
- Decision Maker (who specifies equipment purchases)
- Satisfaction Levels (re manuals, training, service, and technical support)
- Purchase Sources (direct sales, independent representative, stocking distributor, systems integrator, Internet)

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