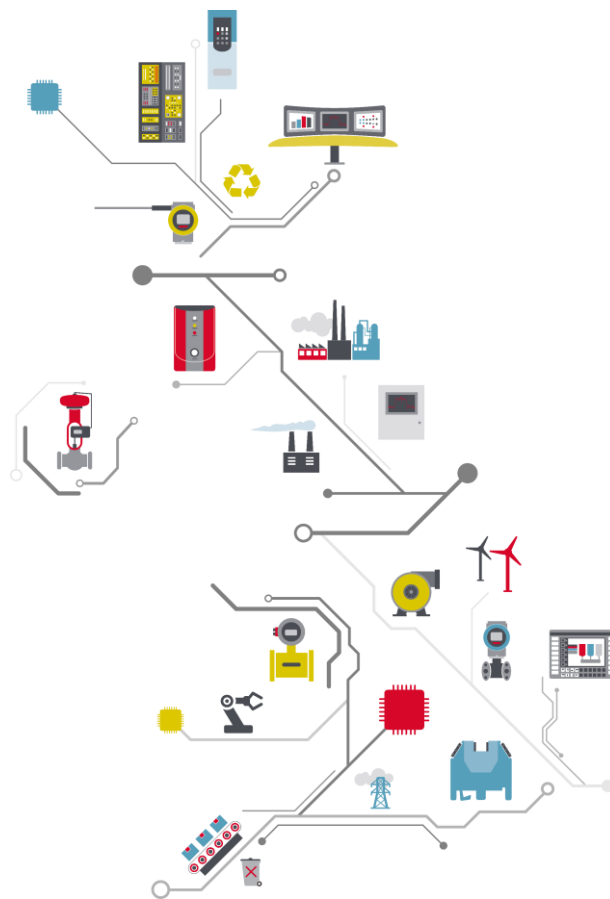


MACIES INTRODUCTION & FAQ



MACIES is subject to Competition Law. These Rules were developed taking into account the Office of Fair Trading's guidance for 'Trade associations, professions and self-regulating bodies', OFT 408:2004, and the Competition Law Guidance of The GAMBICA Association Ltd. To adhere to the law, it is essential to only discuss generic market data and, for trends, to provide personal opinion only.

NO INDIVIDUAL COMPANY DATA SHALL BE PRESENTED OR DISCUSSED

WHAT IS MACIES?...

GAMBICA's Measurement and Control Information Exchange System (MACIES) is a well-established market data collection for automation and instrumentation vendors selling into process industries.

MACIES is centred around an annual meeting where industry experts gather to discuss the aggregated data under strict competition law. The expertise in the room allows accurate estimates to be placed on the overall market for individual product categories. The MACIES meeting also incorporates a third party high-level economic update and forecast giving the state of the UK and global economy with a focus on areas of specific interest to MACIES contributors.

By operating under strict rules and competition law MACIES has cemented itself as a trustworthy and accurate market data collection over its 23-year history with an average participation of 20 companies representing over 70% of the total instrumentation sales from the UK.

KEY DATES

January 2020

Booking and data collection forms circulated

12th February 2020

Submission deadline

12th March 2020

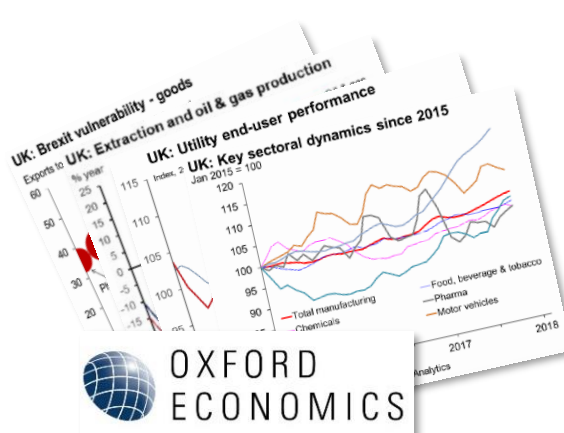
MACIES meeting

Late March 2020

Results circulated

The information in this document is intended for those who are new to MACIES and addresses some common questions and concerns.

[Further documentation related to MACIES is available here.](#)



FREQUENTLY ASKED QUESTIONS

Why should I get involved?

A good **market understanding** represents the foundation of all marketing activities and if you are a UK instrumentation or control equipment vendor selling into **process industries**, MACIES is the best way of obtaining a **clear and detailed** picture of the state of the market and its **movement over time**.

Can I participate?

If you are a **manufacturer** supplying instrumentation into **process industries**, you may participate. If you are a distributor you may only participate if you are the **sole distributor** of a brand. All data from distributors will be carefully checked to avoid double counting.

What's in it for GAMBICA?

GAMBICA are a trade association whose sole responsibility is ensuring our industry is represented and its **potential maximised** wherever possible. One aspect of doing this is allowing companies to **understand where they stand** in the market and where **possible growth areas** are; this is done through MACIES.

We **do not** share outputs with anyone other than MACIES contributors, except for the single headline 'UK Process Automation Market Estimate' figure which is shared on the GAMBICA website.

We charge a small fee for participation to non-members, all of which is used for continuing activities to benefit our sector.

How is MACIES different to other market reports?

GAMBICA does not use any algorithms, assumptions or guess work when reporting market size, the data provided to us by participants is aggregated and presented so is a **truly accurate** representation of the market.

Other market research reports use publicly available data or data from paid databases to estimate market size. This is then cross checked with telephone interviews. This method inevitably leads to incorrect estimates, inflation of figures, and lack of detail in data. These high-level reports are generally available in the £3,000 - £15,000 range depending on personalisation.

How is my data protected?

Data is collected in a standardised format by our statistician. The data is held **off site** and is **not** viewed by any other GAMBICA staff members unless there is a need for **technical clarification**.

Individual company data will **never** be shared. Aggregated data is only shared for categories which have a **minimum of 4 contributors** (or 3, subject to agreement of all parties). MACIES rules are **well defined** and available on request.

Are there league tables?

No. League tables tend to make companies inflate their returns which compromises the accuracy of the MACIES data.

What industries are considered 'process' and why only these industries?

Industries involved with the **production and processing of bulk raw materials** (liquids, gases, powders and slurries) into other products are considered process industries in a MACIES context. Examples are chemical, refining, and food & beverage. In the context of MACIES, power generation is also considered to be a Process Industry.

A list of all MACIES industries with clear definitions is available on request.

GAMBICA does also have collections for other industries types which do not come under MACIES, for details of these collections please contact us.

When does MACIES take place?

MACIES is an **annual** event centred around a **one-day meeting** which happens in mid-March, data must be submitted by February for the **previous calendar year**. Submission packs are distributed in January. The one-day meeting will generally be held at a GAMBICA member facility.

Will I get to see previous years if I participate?

All participants will get detailed data for the current and previous year only. Graphs and charts display the previous 7 years but detailed data for these years will not be shared.

Is there a large administrative burden to participate?

The administrative burden to participants varies based on the ease of extracting sales data within their business. All data submitted is subject to confidential checks on data integrity and any anomalies or inconsistencies will be challenged (again confidentially) so ensuring data is clean in the first instance will save time and effort.

Submission forms are circulated in **early January** each year and the data collected is for the **previous calendar year**. Each company is given around **one month** to gather and submit data.

Where can I find more information?

The MACIES **rules and terms of reference** sheet are available on request. We ask that **all participants read these documents** to ensure the accuracy of the MACIES data. Please contact Scott Pepper (scott.pepper@gambica.org.uk) for details.

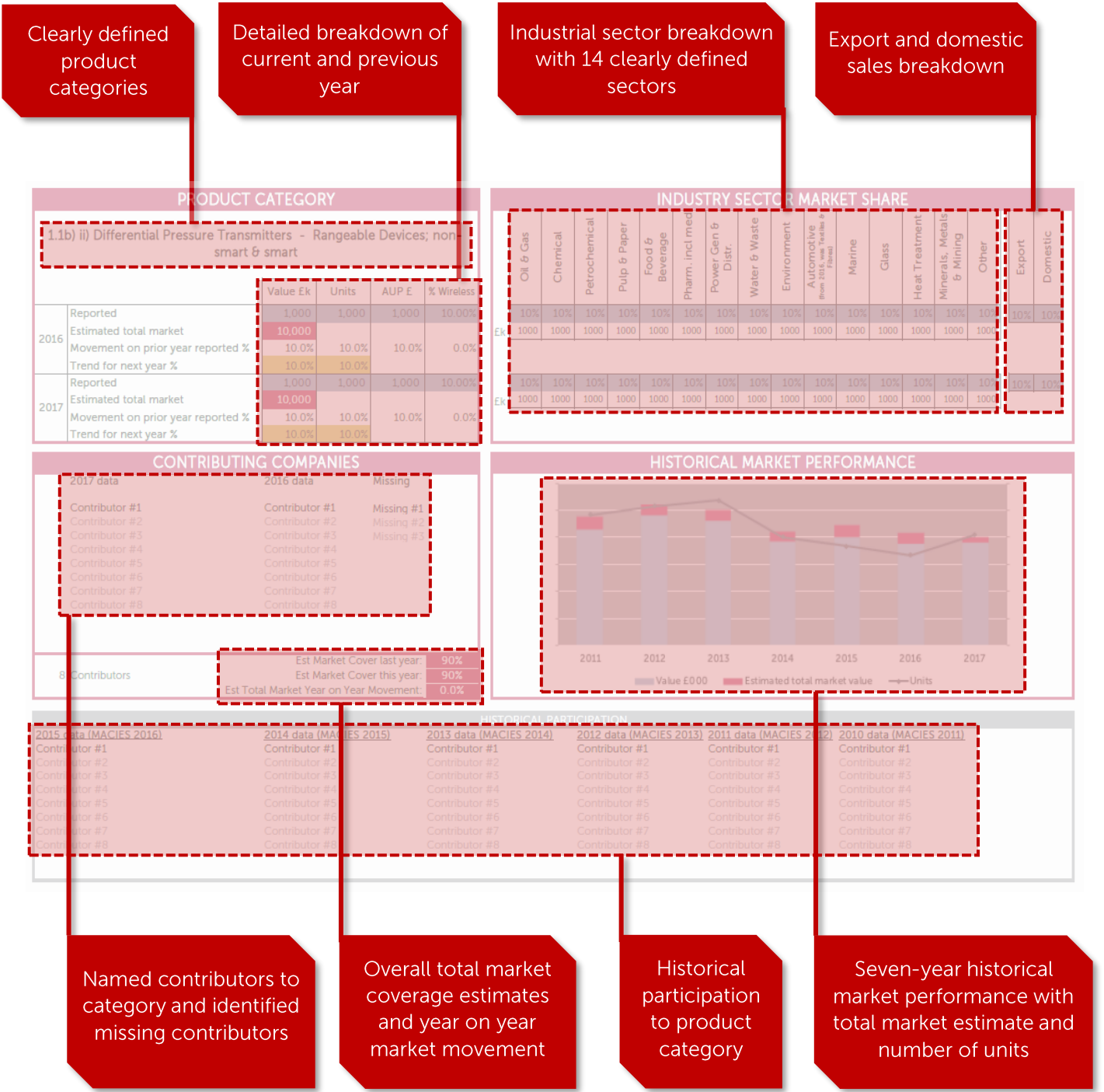
How much does it cost?

Members have access to **all services** which GAMBICA offer so MACIES participation forms a part of the value of being a member. Members also have the ability to **influence changes and improvements** to be implemented within MACIES, these are discussed and agreed through GAMBICA's **Process Instrumentation & Control Council**.

Non-members may also participate in MACIES, with fees structured based on UK turnover. Due to the fact that GAMBICA are a non-profit organisation the costs to participate are minimal and generally around an order of magnitude lower than other market research report providers. For the current non-member costs please contact us.

CATEGORY REPORT

The bulk of the MACIES report is formed of individual category pages in the below format. These pages are produced for every category which is valid for that year.



PRODUCT CATEGORIES

Pressure	Pressure and Absolute Pressure Transmitters - Fixed Span Devices
	Pressure and Absolute Pressure Transmitters - Rangeable Devices; non-smart & smart
	Differential Pressure Transmitters - Rangeable Devices; non-smart & smart
	Multivariable Pressure
	Pressure Switches
Temperature	Temperature Transmitters - head mounted
	Temperature Transmitters - field mounted
	Temperature Transmitters - panel or rack mounted
Level	Ultrasonic Level Transmitters & Systems; liquid & dry product
	Ultrasonic Level Transmitters & Systems; dry product only
	Microwave Level Transmitters; (Radar) time of flight
	MLT (Radar) time of flight; Inventory Tank gauging
	Microwave Level Transmitters; GWR and TDR
	Capacitive Level Transmitters
	Other Level Measurement Principle Transmitters
	Hydrostatic Sensors / Transducers or Pressure Transmitters for Measuring Level
	Level Switches; liquids
	Level Switches; solids
Flow & Density	Electromagnetic Flowmeters
	Coriolis Mass Flowmeters
	Vortex Meters
	Dedicated Density Measurement - Liquid
	Dedicated Density Measurement - Gas
	Variable Area; Metal – without transmitter
	Variable Area; Metal – with transmitter
	Variable Area; Glass
	Ultrasonic; Closed Pipe – invasive (wetted transducers)
	Ultrasonic; Closed Pipe – non-invasive (liquid)
	Ultrasonic; Closed Pipe – non-invasive (gas)
	Ultrasonic; Open Channel
	Thermal Mass Flowmeters and Controllers; in-line – up to and including 1/2"
	Thermal Mass Flowmeters and Controllers; in-line – over 1/2"
	Thermal Mass Flowmeters and Controllers; Insertion type sensor
Converters	(I/P & P/I) Smart and Non-smart
Electronic Controllers	Controllers: 1/32 DIN, 1/16 DIN, 1/8 DIN, 1/4 DIN, Process Format & Back of Panel
	Panel Indicators
Liquid Analytical Instruments	Sensors / Probes - Dissolved Oxygen
	Sensors / Probes - Suspended Solids - including turbidity
	Sensors / Probes - Chlorine
	Sensors / Probes - pH and ORP
	Sensors / Probes - Conductivity
	Transmitters - single variable
Gas Analytical Instruments	Transmitters - multi variable
	NIR analysers
	Gas Chromatograph analysers - Process & Flue
	H2O analysers
	Moisture measurement
	Oxygen analysers (gas) - for % analysis
	Oxygen analysers (gas) - for ppm (trace) analysis
Systems	Laser (TDLS) Analysers
	DCS Hardware
	DCS Software
	DCS Project Services
	DCS Operations Services
	SCADA (Supervisory Control and Data Acquisition Systems)
Recorders	Paper chart recorders
	Paperless Recorders
Positioners	Positioners for Control Valves; smart
	Positioners for Control Valves; non-smart
Wireless Infrastructure	Wireless Adaptors (standalone)
	Wireless Gateways & Repeaters