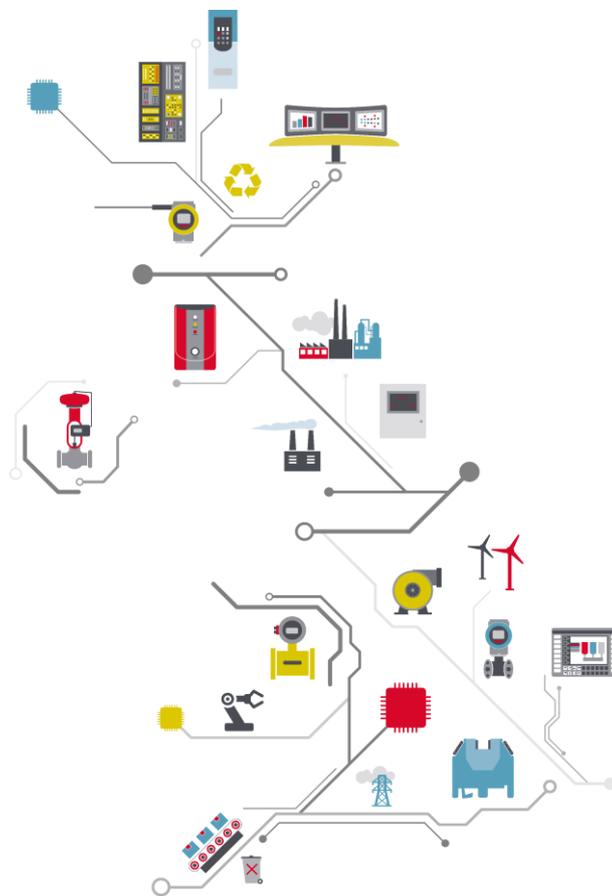


MACIES INTRODUCTION & FAQ



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 to form the most accurate estimates 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, focusing 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 coverage of over 70% of the total instrumentation sales from the UK.

KEY DATES

January 2022
Booking and data collection forms circulated

17th February 2022
Submission deadline

17th March 2022
MACIES meeting

Late March 2022
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.](#)



MACIES

 **OXFORD ECONOMICS**

For more information please contact Scott Pepper:
E: scott.pepper@gambica.org.uk **T:** 07584 212 032

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 **potential growth areas**; 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 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 guesswork when reporting market size; the data provided to us by participants is aggregated and presented, so it is a **truly accurate** representation of the market.

Other market research reports use publicly available data or data from paid databases to estimate market sizes. This is then cross-checked with telephone interviews. This method inevitably leads to incorrect estimates, inflation of figures, and a 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 with 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 also has collections for other industries types that do not come under MACIES; please contact us for details of these collections.

When does MACIES take place?

MACIES is an **annual** event centred around a **one-day meeting** that 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 years 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.

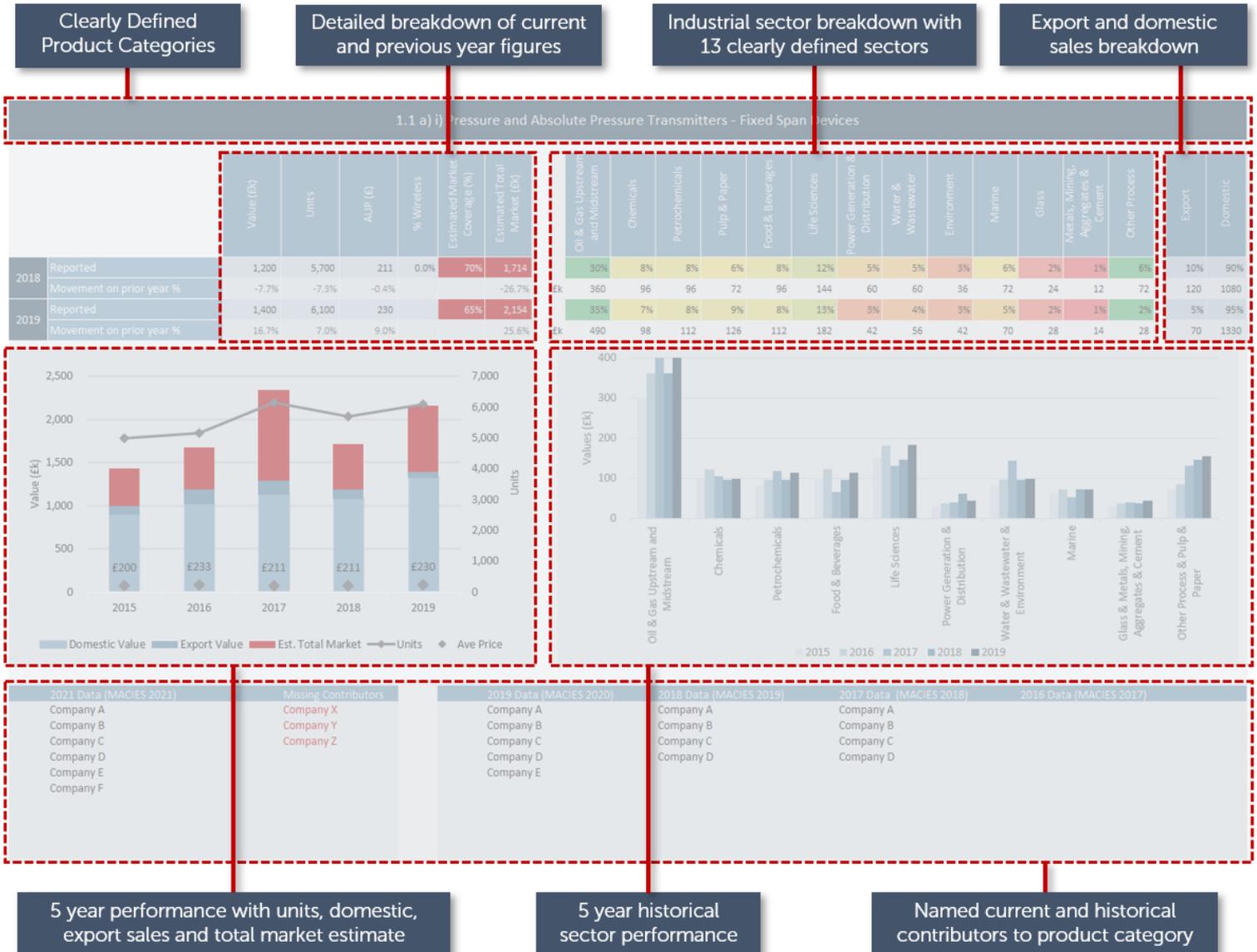
How much does it cost?

GAMBICA members have access to **all services** offered by GAMBICA, 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 upon through GAMBICA's **Process Instrumentation & Control Council**.

Non-members may also participate in MACIES, with fees structured based on UK turnover. Because GAMBICA is 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 get in touch with 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 valid category that year.



PRODUCT CATEGORIES

Pressure Transmitters
Pressure & Absolute pressure - Fixed span devices
Pressure & Absolute pressure - Rangeable devices; smart
Pressure & Absolute pressure - Rangeable devices; non-smart
Differential Pressure - Rangeable devices; non-smart & smart
Multivariable Pressure
Pressure Switches
Temperature Transmitters
Temp Transmitters - head mounted (including "Hockey Puck")
Temp Transmitters - field mounted
Temp Transmitters - panel or rack mounted
Level Measurement
Ultrasonic Level Transmitters - Liquid & Dry product
Microwave Level Transmitters (Radar) time of flight
MLT(Radar) time of flight - Inventory Tank Gauging
Microwave Level Trans (Radar) - GWR & TDR
Capacitive Level Transmitters
Other Level Measurement Principle Transmitters
Stand Alone Hydrostatic Sensors / Transducers Pressure Transmitters for Measuring Level
Level Switches - liquids
Level Switches - solids
Flowmeters
Electromagnetic Flowmeters
Coriolis Mass Flowmeters
Vortex Meters (excluding domestic)
Dedicated Density Measurement - Liquid
Dedicated Density Measurement - Gas
Variable Area - metal - without transmitters (non smart)
Variable Area - metal - with transmitters
Variable Area - glass (non smart)
Ultrasonic - Closed Pipe - wetted transducers
Ultrasonic - Closed Pipe - non invasive - liquid
Ultrasonic - Closed Pipe - non invasive - gas
Ultrasonic - Open Channel
TMFC- in-line type sensor - ≤ ½"
TMFC in-line type sensor - > ½"
TMFC - insertion type sensor
Converters (I-P & P-I) Smart and non-smart
Stand Alone Controllers / Indicators
1/32 DIN, 1/16 DIN, 1/8 DIN, 1/4 DIN, Process Format & Back of Panel
Panel Indicators
Analytical Instruments - LIQUID
Sensors / Probes - Dissolved Oxygen
Sensors / Probes - Suspended Solids - including turbidity
Sensors / Probes - Chlorine
Sensors / Probes - pH and ORP
Sensors / Probes - Conductivity
Transmitters - single variable
Transmitters - multi variable
Analytical Instruments - GAS
NIR analysers
Gas Chromatograph analysers - Process & Flue
H ₂ O analysers
Moisture measurement
Oxygen analysers (gas) - for % analysis
Oxygen analysers (gas) - for ppm (trace) analysis
Laser (TDLS) Analysers
Systems (Value only)
Hardware
Software
Project Services
Operations Services
SCADA (Supervisory Control & Data Acquisition Systems)
Recorders
Paperchart Recorders
Paperless Recorders (up to 500 loops maximum)
Others
Control Valve Positioners - 100% smart
Control Valve Positioners - non smart
Wireless Adaptors (standalone)
Wireless Gateways & Repeaters
Services (Value only)
Total Instrument Services

For more information please contact Scott Pepper:
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