

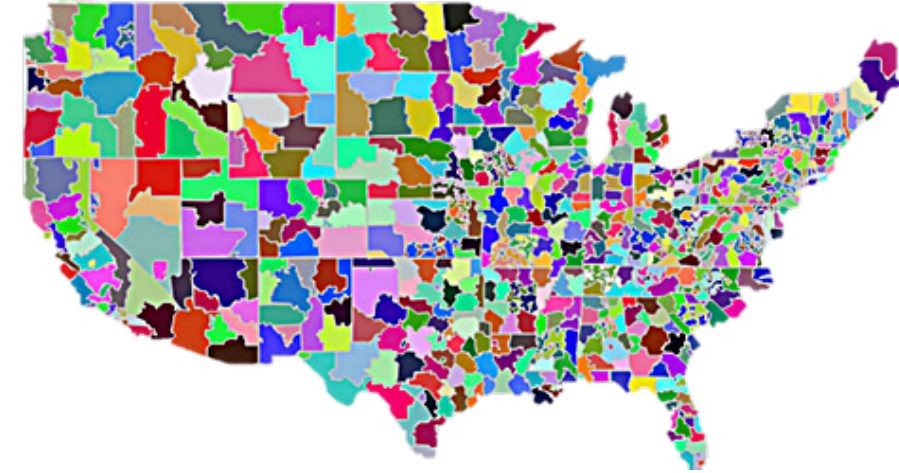
ReMaP™ Regional Market Potential, is a program designed to provide Clients with a much more ***granular or local estimate*** of the market size for Process Instrumentation and Automation (PI&A) products. Sales, Marketing, and Service Executives now have the ability to identify sales opportunities at, and ***within, individual sales and service territories.***

The following presentation provides an example of a ReMaP™ assessment “Drilldown” from the national market potential for pressure transmitters, down to the the market potential in two 3-digit zip code areas: Houston and the Ship Channel.

Drill Down

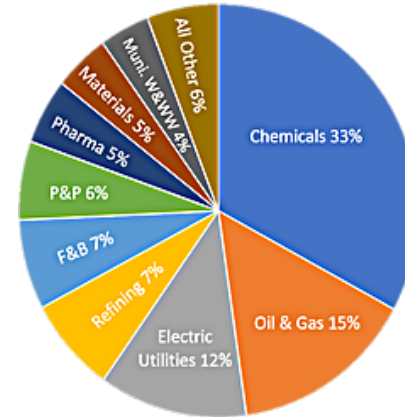
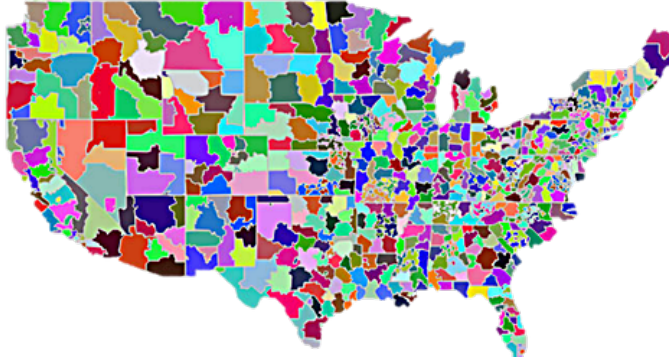
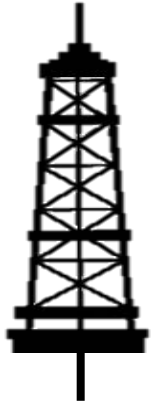
United States Introduction

- A ReMaP™ assessment provides you with market size and segmentation at the 3-digit zip code level. Following we present an example in the "drill down" nature of the ReMaP™ program.
- This example shows that the U.S. national market value for pressure transmitters is \$532M. (Throughout the example, the market values are actual, but not current.)
- The ReMaP™ assessment begins with this value, and provides increasingly detailed granular market values by region.
- The example shows that a ReMaP™ assessment can not only provide granular market size data,
- but also provides insight into the industry distribution and concentration at the Zip Code level.
- See "Documents" for the specific data formats and "Methodology" for a discussion of how ReMaP™ works.

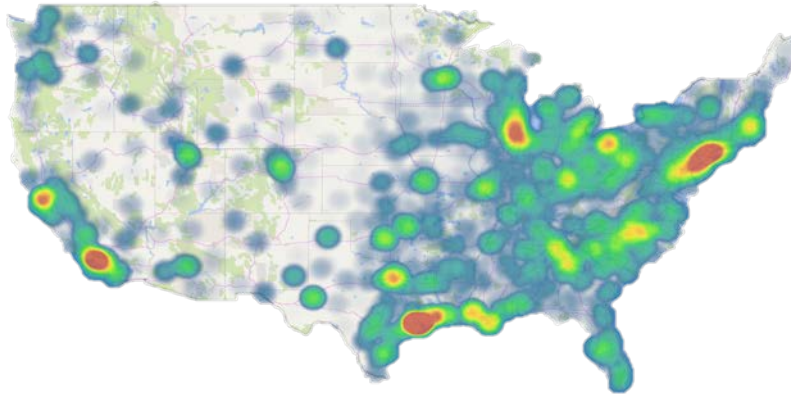


Drill Down

United States



U.S. Pressure Transmitter Market
Value = \$532M



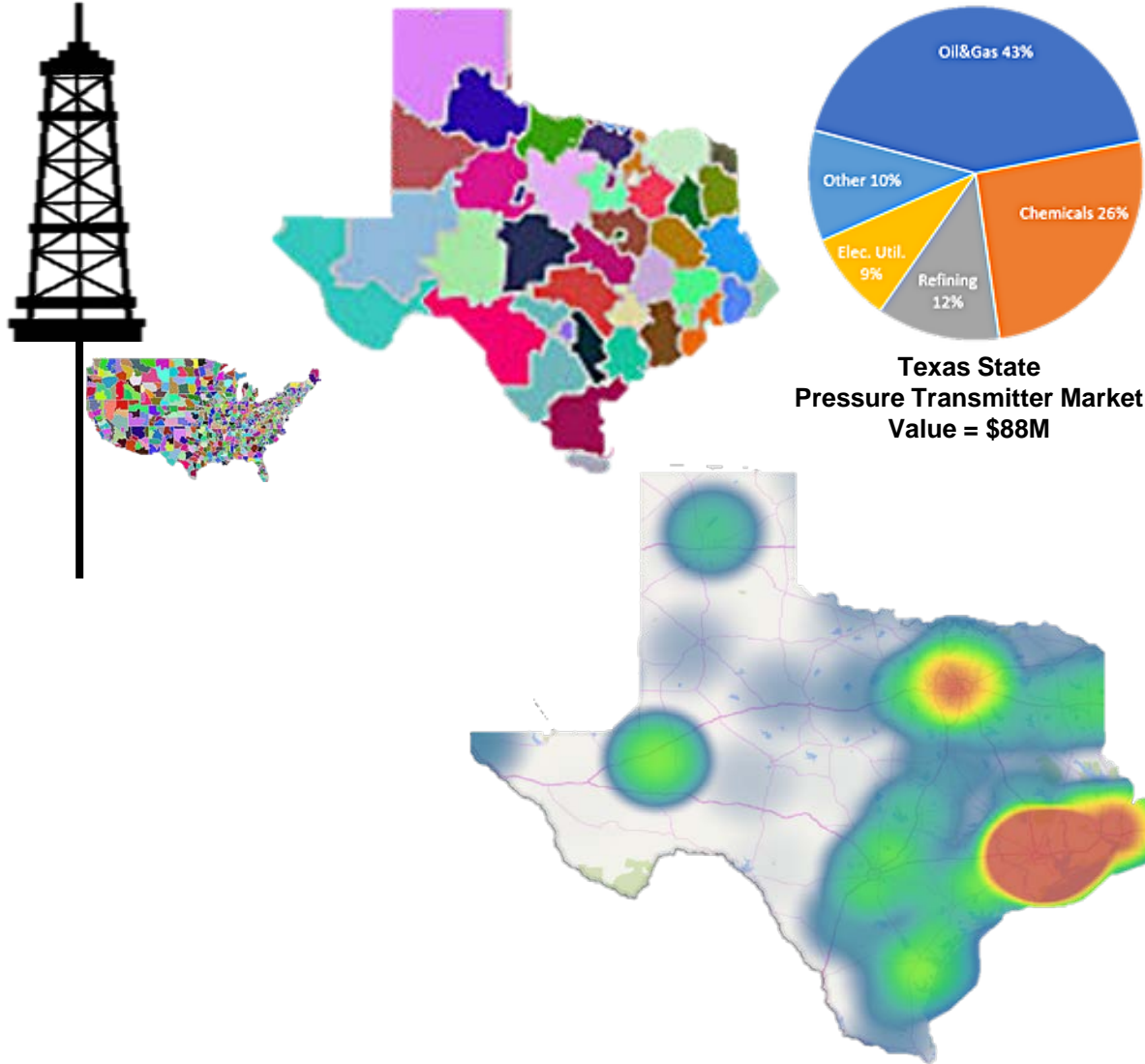
- As of February 2015, there were 929 3-digit zip codes in the United States. 20 or 30 of these are zip codes dedicated to government facilities such as the various IRS offices, military bases, etc.
- Of these about 860 will have sufficient process industry plant(s) (refinery, paper mill, chemical plant, etc.) to create a market potential for pressure transmitters.
- The heat map shows that there are concentrations of market potential on the east coast, in the southeast and Midwest, the gulf coast, and the west coast.
- In this example, we will drill down and look much closer at the Texas gulf coast area.

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*The heat maps are centered on the geographic center of the 3-digit zip code region, not necessarily on the concentration of market potential within the region.

Drill Down

Texas

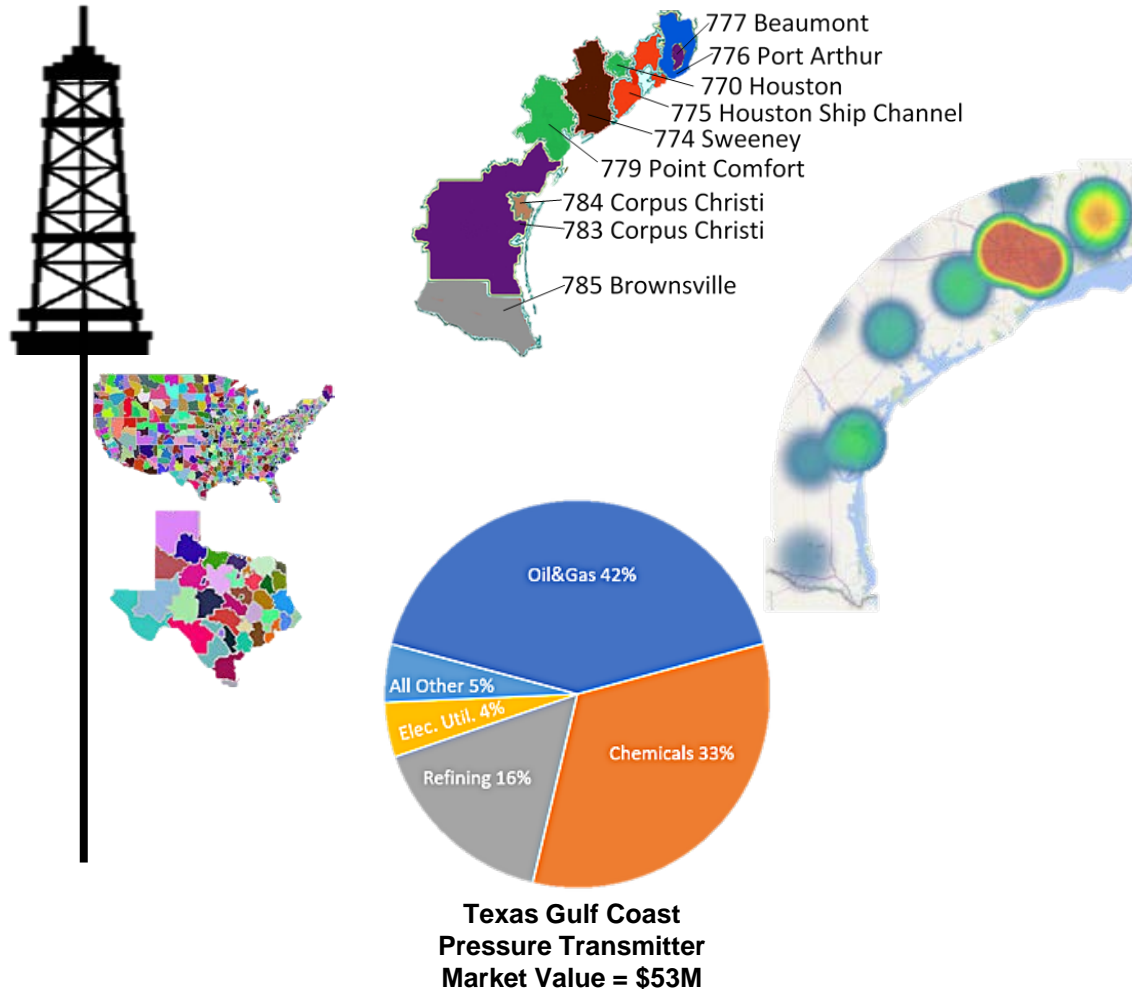


- There are 41 3-digit zip codes in the state of Texas.
- The heat map shows the market potential is concentrated on the coast, centered on Houston, but stretches all the way to the U.S.-Mexico border.
- Dallas is the next highest area of market potential, with further potential stretching east to Shreveport.
- The other centers of market potential are San Antonio, Odessa/Midland, and Amarillo.

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Drill Down

Gulf Coast

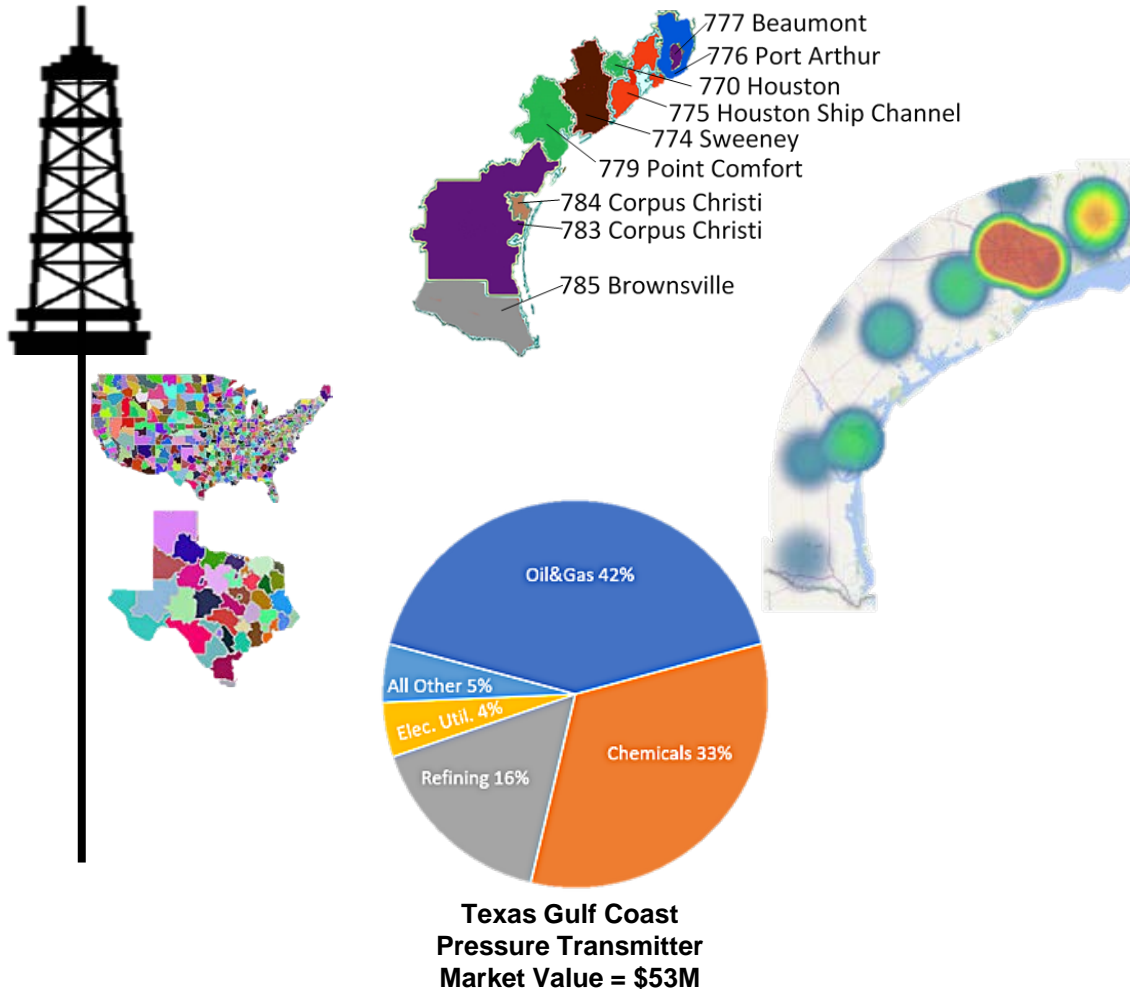


- There are 9 3-digit zip codes on the Texas gulf coast stretching from the U.S.-Mexico border to the Texas-Louisiana border*
- The Texas gulf coast market value is \$53 million, 60 percent of the total pressure transmitters market potential of the state of Texas
- The heat map shows the highest concentration in Houston (770) and the Houston Ship Channel (777).* This region accounts for \$36M in market value, about 39 percent of the Texas state total

*The heat maps are centered on the geographic center of the 3-digit zip code region, not necessarily on the concentration of market potential within the region.

Drill Down

Gulf Coast

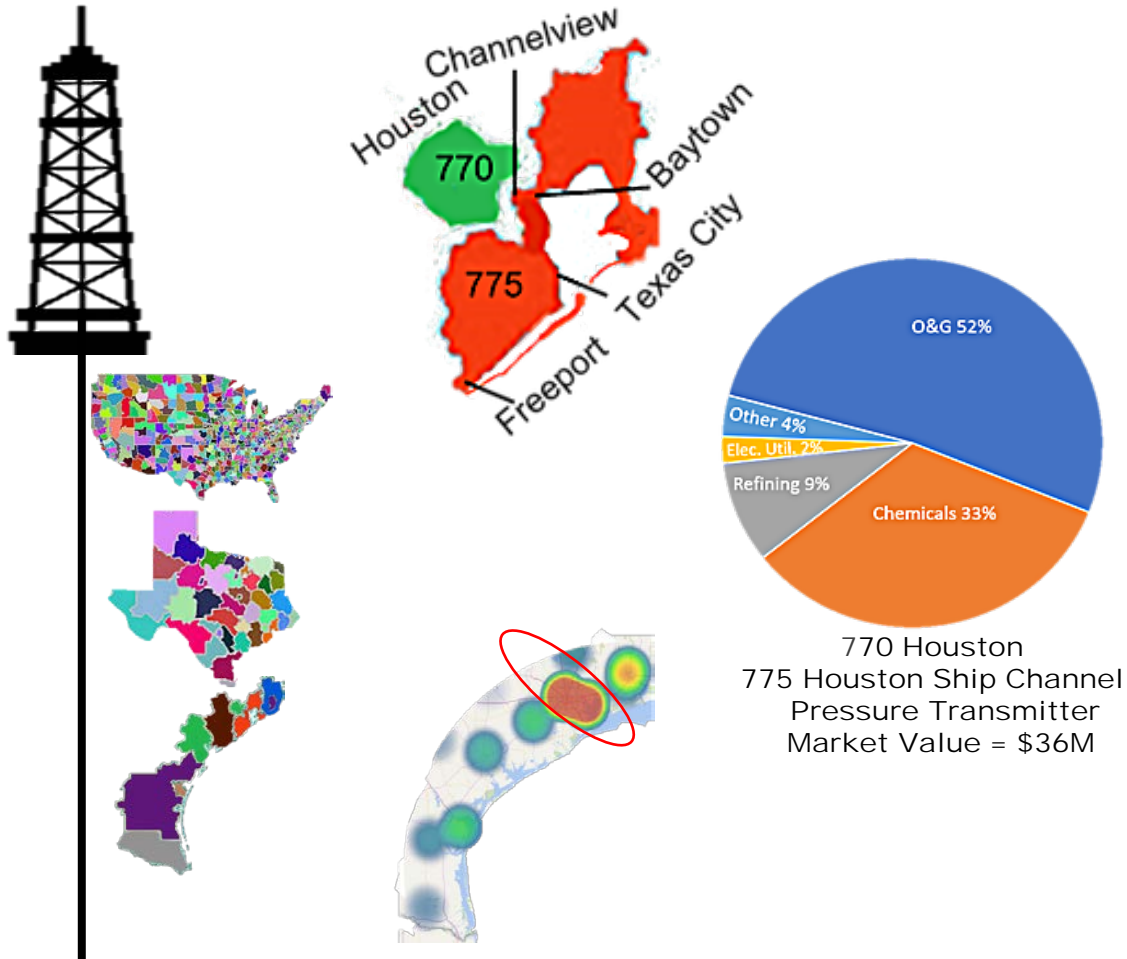


- The heat map shows a second, high level of market potential to the northeast of Houston. This concentration is the 3-digit zip codes 776 and 777 regions.
- The 777 region is surrounded by the 776 region.
- This combined region accounts for \$7M in market value or 8 percent of the Texas state total.
- The region includes Beaumont and Port Arthur, both centers for the refining and chemicals industry.
- The 5 remaining 3-digit zip code regions account for about \$10 million in pressure transmitter annual market value, about 11 percent of the Texas state total.
- These regions include 785-Brownsville* (~\$0.6M in market value), 783,784-Corpus Christi (~\$5M), 779-Point Comfort and Victoria (~\$2M), and 774-Sweeney (~2.5M).

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Drill Down

Houston/Ship Channel

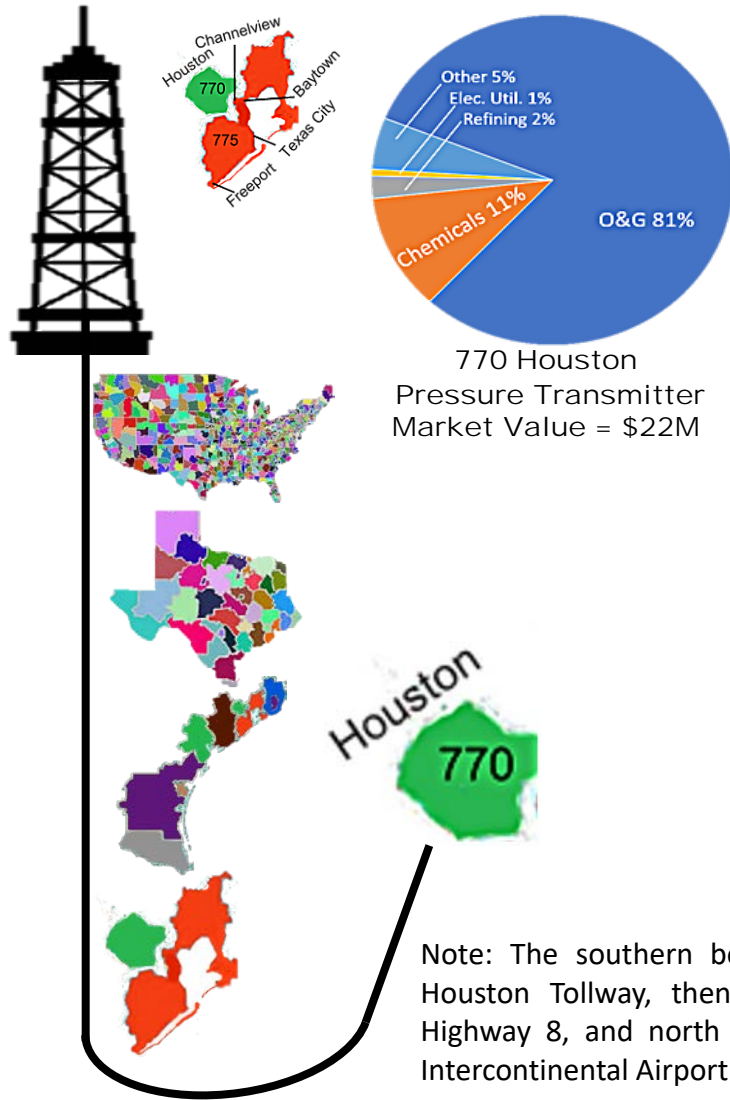


- The Houston/Ship Channel region (770 & 775)* accounts for \$36M in market value, about 39 percent of the Texas state total.
- Houston market value = \$22M
- Ship Channel market value = \$14M
- In this highly concentrated area, three industries account for 94 percent of the pressure transmitter market value: O&G, Chemicals and Refining.

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Drill Down

Houston

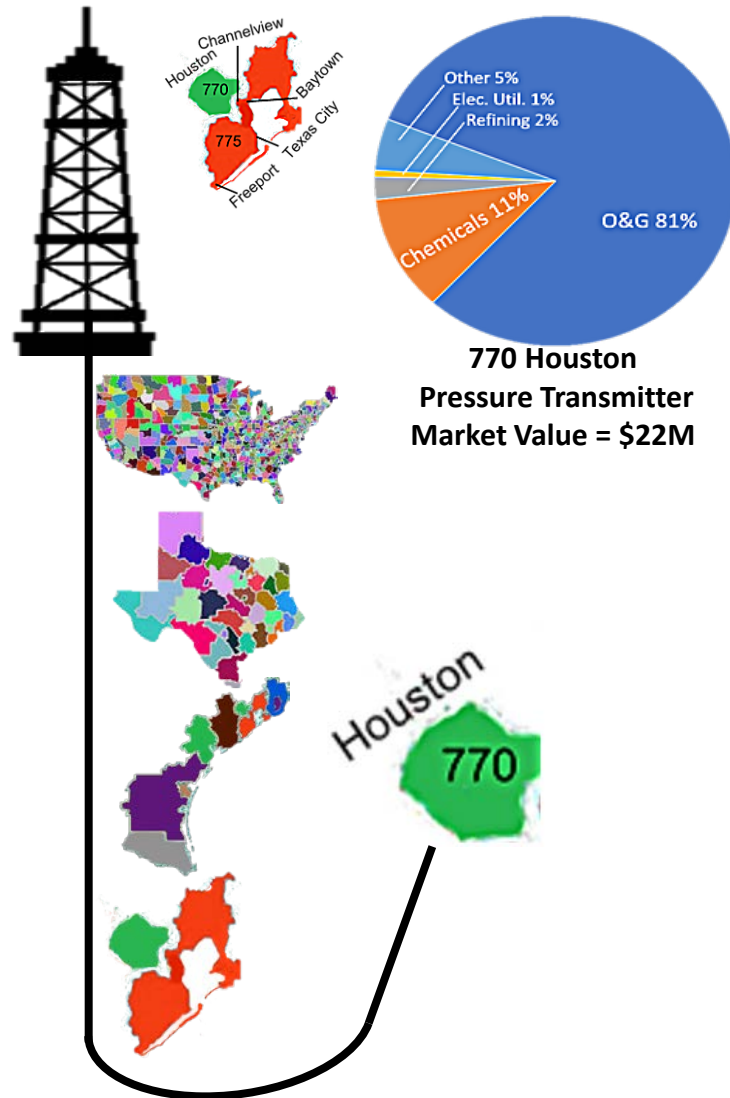


- Houston has the highest concentration of Oil & Gas corporate headquarters, corporate engineering, procurement, and operations, EPCs, and systems integrations in the U.S.
- More than other industry segments (refining, chemicals, etc.) the Oil & Gas industry is centralized, since its drilling and production facilities tend to be smaller and geographically diffuse.
- This one 3-digit zip code accounts for 25 percent of the Texas state total market value for pressure transmitters

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Drill Down

Takeaway
Houston

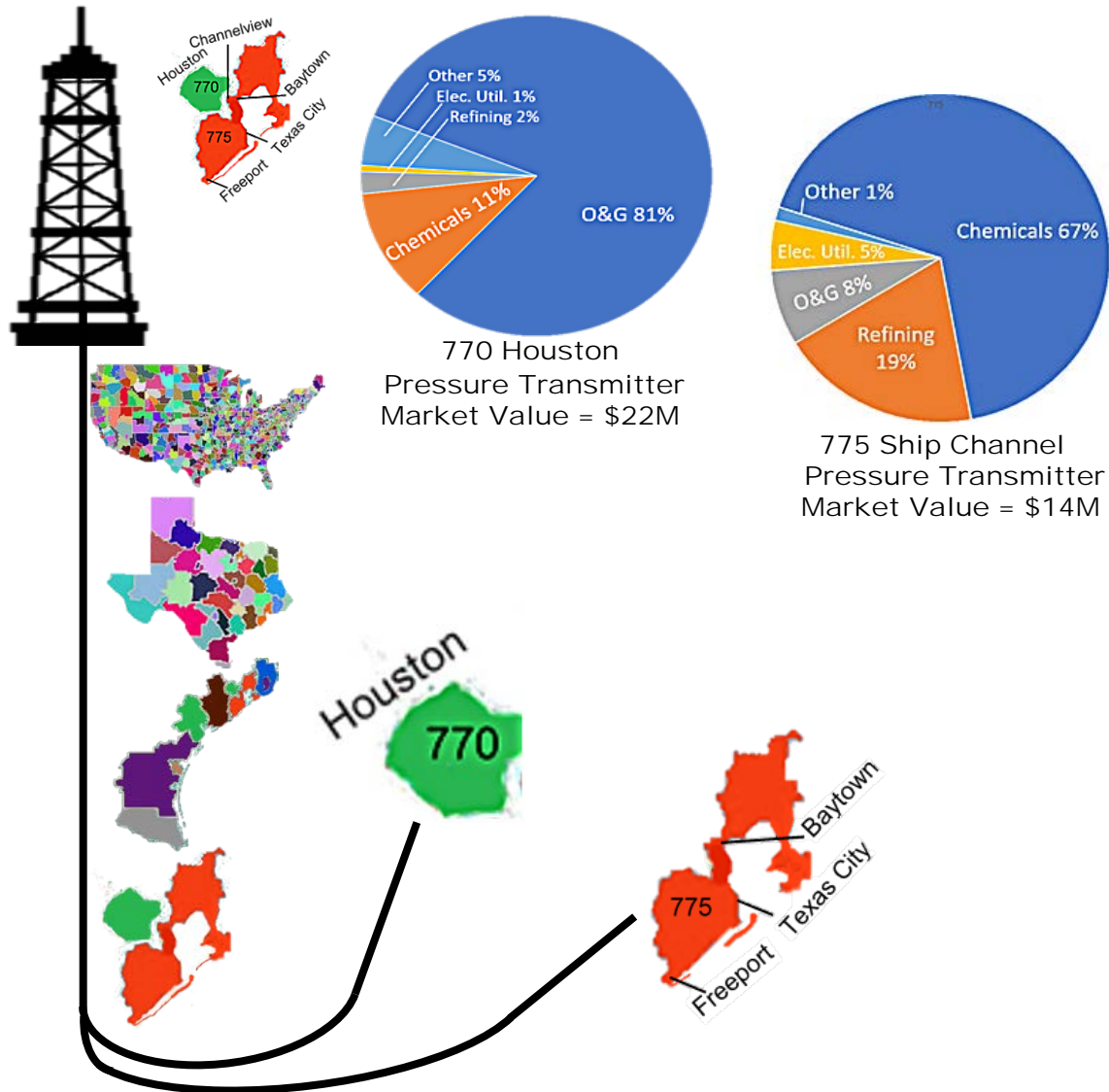


- Houston represents an overwhelming opportunity to identify, influence, and/or book sales to the Oil & Gas industry.
- The concentration of Oil & Gas company headquarters means:
 - Access to high level decision-maker
 - ID projects under consideration or planned
- Centralized engineering groups provide:
 - Influence on technical specifications
 - ID of key technical preferences, future expectations
- Centralized purchasing groups mean:
 - Negotiation of corporate contracts
 - ID key local and regional MRO purchasing

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Drill Down

Ship Channel

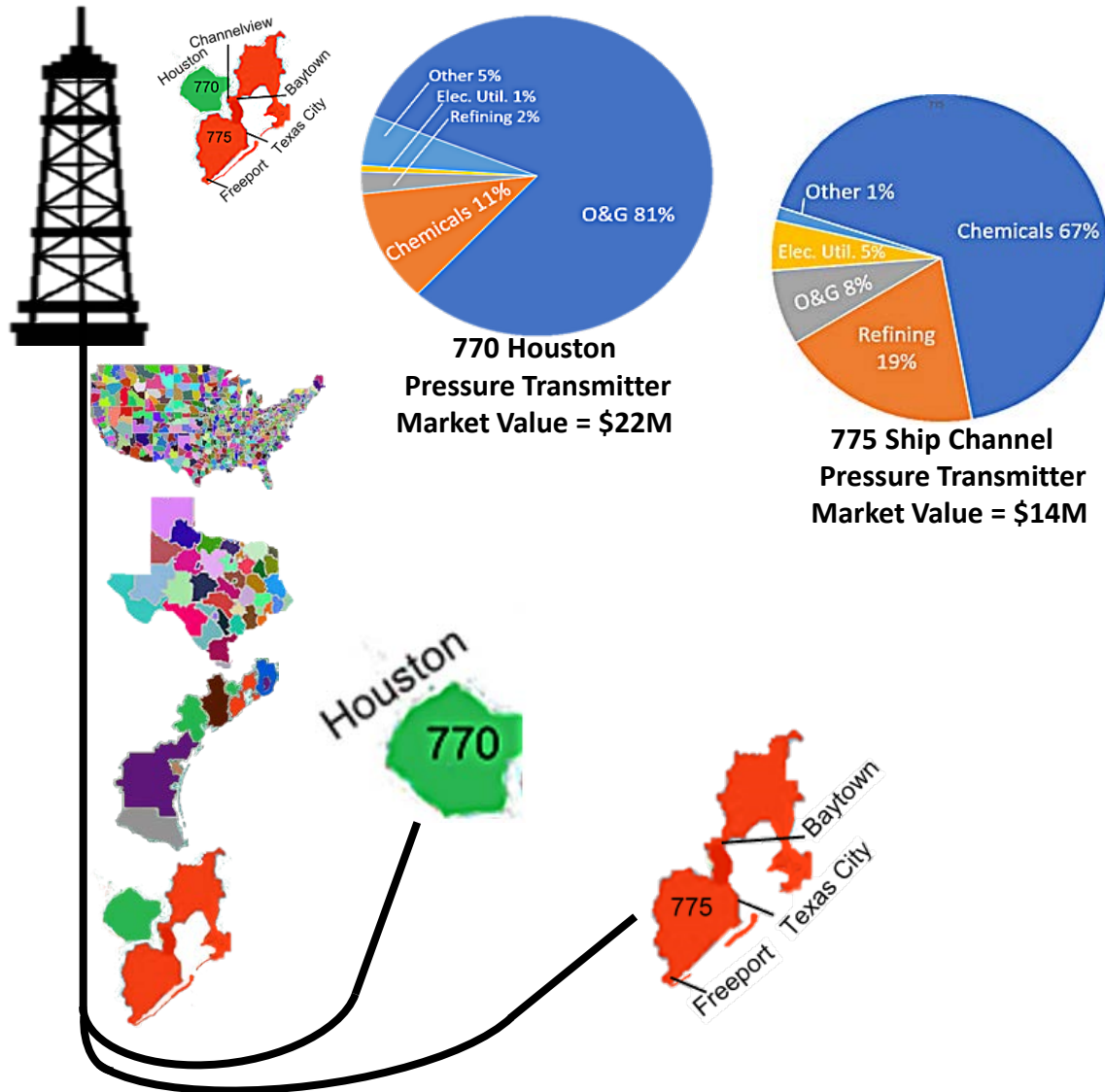


- The Ship Channel (Texas City, Baytown, Channelview, Freeport, etc.) is dominated by chemical plants and refineries.
- This one 3-digit zip code accounts for 16 percent of the Texas state total market value for pressure transmitters.

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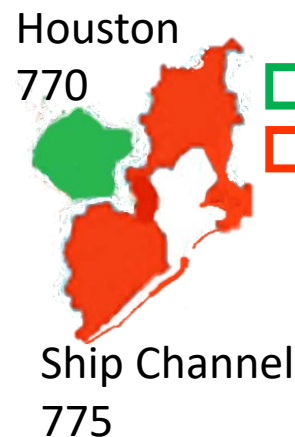
Drill Down

Takeaway Ship Channel



- In the Ship Channel, there is a concentration of larger refining and chemical plants, smaller chemical companies, and plant support services such as industrial gases, toll sulfur and coking plants, etc.
- The concentration of large plants means:
 - Large MRO purchases, demand for local spares storage for rapid delivery
 - Need to work with National/Global headquarters salespeople to influence local projects
- Smaller companies mean:
 - Local: purchasing, headquarters engineering, operations management, project planning
- Plant Support Services mean:
 - MRO purchases
 - Need to work with National/Global headquarters salespeople to influence local projects

- At the right is an example of an actual ReMaP™ assessment report. Each product line or product category ReMaP™ result is tabulated on a separate worksheet within the report workbook.
- **3-digit Zip Codes** The left hand column is the list of 3-digit zip codes from 010 to 999 for a total of 865 zip codes. The zip codes selected for ReMaP™ encompass all the regions with some PI&A market value.
- **Industry by Zip Code Market Value** In the next 10 columns the market value for the product in each zip code for each industry is tabulated.
- **Alternative Formats are available** For those Clients who want to import the ReMaP™ data into a database, the results are tabulated in individual records.

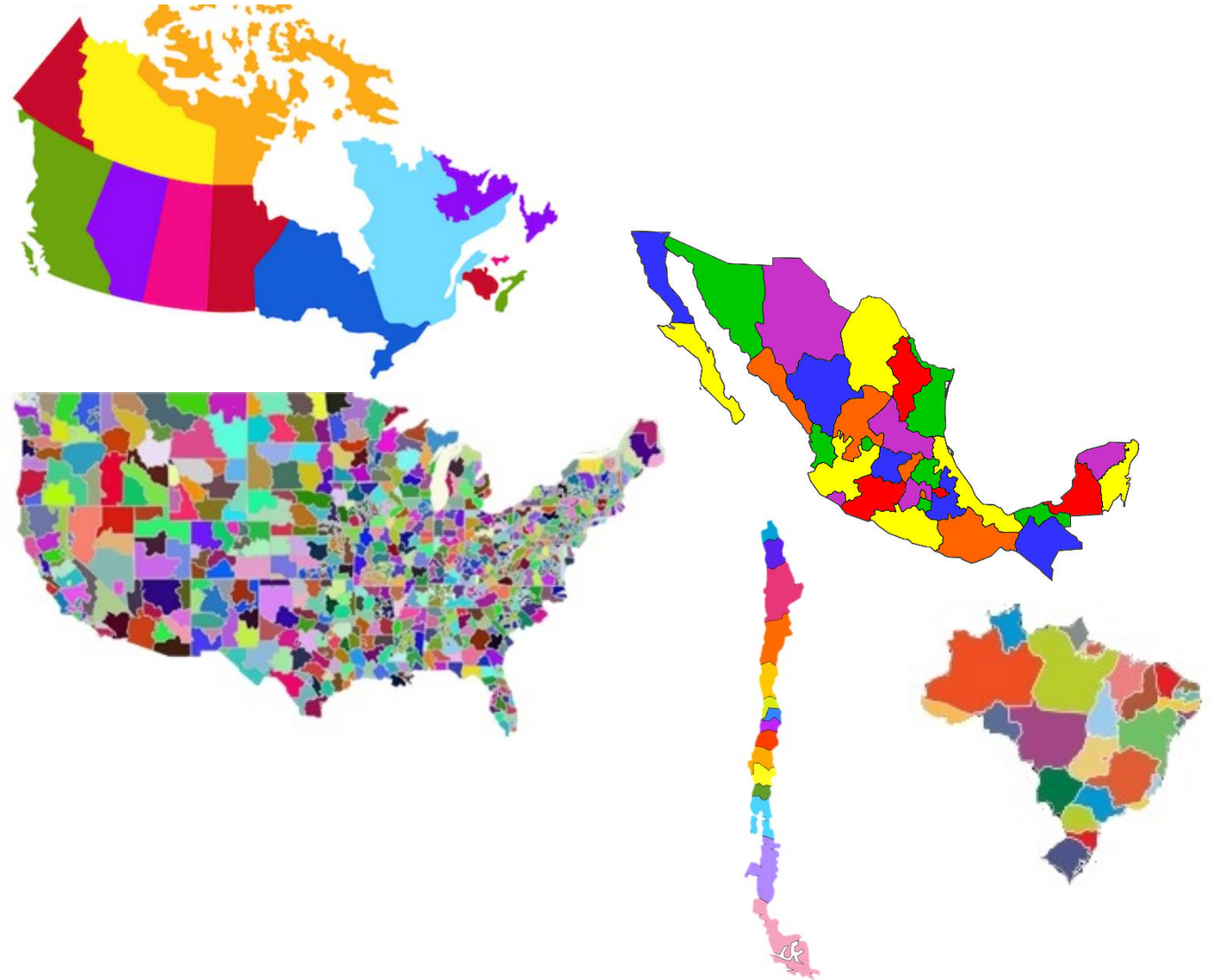


3-Digit Zip Code	Oil&Gas	Refining	Chemicals	Pharma	Food & Beverage	Pulp & Paper	Elec. Util	W&WW	Materials	Other	Total
010			23		95	162	56	25	5		366
012			54			212		7	5		278
180	86		165	5	88		287	24	56	12	723
181			75		50			18	-		143
195			97	5	32				42	44	219
196			134		78	8	73	9	76		377
769	361	14			11			13	-	8	409
770	17,522	482	2,461		350		140	291	169	286	21,700
772	799				1				5		806
775	1,044	2,704	9,422	5	50		689	91	40		14,046
776	80	2,329	2,481		6	291	398	14	25	16	5,641
783	787	17	836				33	9	1		1,684
784	86	14			121	18	188	127	10	8	573
785	534	854	390		64		32	5	-		1,877
951			99		101		31	42	-		274
952		33	62	218	47		53	113	44		570
956				62	42			11	-	67	181
976			145	141	35	697	73	27	21	394	1,534
986			622		240	97		27	11	272	1,269
Total	79,116	39,782	175,162	27,386	37,488	32,813	64,020	21,726	24,075	30,865	532,432

ReMaP™

Geographic Coverage

- Canada
 - 13 Canadian Provinces & Territories
- United States
 - 900 3-Digit Zip Codes
- Mexico
 - 31 Mexican States
- Brazil
 - 27 Brazilian States
- Chile
 - 15 Chilean Regions



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- Benchmark sales territories by product and industry
- Align sales territories based on best fit with local industry/product mix
- Locate field service offices, distribution centers, etc. based on the local industry/product mix
- Target marketing & promotion programs to local industries concentrations
- Size sales and service resources to the local market potential

Contact Us Today!

We can provide a sample ReMaP™ assessment that will allow you to evaluate the possibilities and potentials of ReMaP™ to enhance your Sales and Marketing plans and execution.

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