

IloT and Remote O&M

Market Forecasts, Newsletter, Directory
and Acquisition Analyses



Contents

- 68 thousand continually updated forecasts - periodic excel files provided
- Networking directory with many thousands of people
- Purchases by top customers
- Monthly newsletter
- Acquisition database
- Recorded webinars on major applications



- The industrial process IIoT and Remote O&M world market will exceed \$300 billion by 2026. It is comprised of thousands of air, water, and energy (AWE) market niches.
- The growth rate from 2016 to 2026 will be closer to 6% than the 10% predicted by McIlvaine five years ago.
- On the other hand, the EBITA growth will be higher than revenue growth indicating the higher profitability of IIoT and Remote O&M products.
- The scope of this forecast just includes processes. It does not include automation of administrative activities. Nor does it include discrete machine automation.
- In fact, the other way to define the scope is the applicability to the operation of filters, scrubbers, centrifuges, combustors, heat exchangers, fans, compressors, pumps, valves, and reactors.
- These are the subjects which are also forecasted in the McIlvaine NO 64 Air, Water, Energy report.

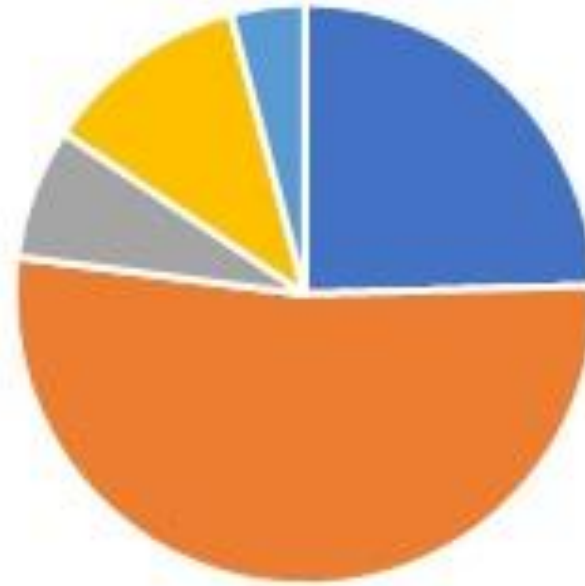
Products

- The major categories of guide, control, and measure have been utilized and were selected because they best segment the different product groups.
- **Guide:** includes process management, data analytics and subject matter expertise. McIlvaine has introduced a new category-sub subject matter ultra-experts (SMUE). These are experts who keep current through an industrial internet of wisdom
- **Control:** includes SCADA, PLCs, wireless transmission, and cloud hardware (not software).
- **Measure:** includes sensors, analyzers, and edge computing technology to measure parameters relative to liquids, gases, and free flowing solids. Since fans and pumps are used in the pertinent processes, the category also includes vibration measurement, corrosion and other measurements used in combustion, separation, transport, heat exchange, evaporation etc.



IIoT Revenues 2026

Subscribers receive excel files which they can manipulate. There are sort capabilities by sub region and the four world segments (Americas, Asia, EMEA and Africa).



■ Guide ■ Control ■ Air Meas ■ Liquid Meas ■ Solids Meas

5 Products x 17 Industries x 80 Countries x 10 years
= 68,000 Forecasts Continually Updated

Forecasts for 17 Industries		
Chemical	Oil & Gas Upstream	Pulp & Paper
Petrochemical	Oil & Gas Midstream	Refining
Food	Other Electronics	Semiconductor
Iron and Steel	Other Industries	Wastewater
Metals	Pharmaceutical	Water
Mining	Power	Water



Continuous Acquisition Analysis

- The June 22 additions cover the 80 acquisitions by Ametek and provide an analysis of Magnetrol. This acquisition gives Ametek leadership in a number of market niches. These are summarized in the June issue. There are links to previous issues analyzing Magnetrol marketing strategy including advertising expenditure in certain magazines with comparison to Ametek.

The older acquisition articles are important.

- The newsletter covered the initial public offering for Environment SA in 2007 and its acquisition by Carlyle in 2020. Typically, financial information becomes scarce when a private equity firm makes an acquisition. So, information from previous acquisition transactions becomes important.
- ISEO, Becker/Amesa, Altech, PCME, and TDL have all been acquired in the 2007-2020 period. The newsletter has close to 100 articles on these ENVEA subsidiaries at the time they were acquired.

These shed light on acquisitions.

Acquisition Database with at Least Ten Monthly Additions

560 Previous Acquisitions in Database			
Year	Month	Acquirer	Acquired
2022	6	Siemens	Senseye
2022	6	CDR	Roper
2022	6	Ametek	80 acquisitions
558 Previous Articles on Acquisitions			
2021	6	Ametek	Magnetrol
2007	3	Environment Public	Environment Private
2020	6	Carlyle	ENVEA (formerly Environment SA



Newsletter Every Month for 511 Months

INDUSTRIAL IoT & REMOTE O+M NEWSLETTER

June 2022

No. 511

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MARKETS

- AWE Knowledge Ebbs and Flows When it Should be Advancing
- Acquisition Tracking in AWE Markets

APPLICATIONS

- B&W Online Monitoring System Optimizes Cooling Tower and Heat Exchanger Operation
- B&W Provides Systems For In-Furnace Processes Measurement
- Siemens Acquires Senseye - Predictive Maintenance and Asset Intelligence for Industrial Companies
- ABB Boosts Orders 20% in 2021
- ABB Predicting Increased Profitability in the Energy Sector
- Baker Hughes Collaborates With C3 AI, Accenture, and Microsoft on Industrial Asset Management Solutions
- Valmet Will Supply Automation For UK WTE Plant

Acquisitions Covered in June 2022 IIoT Newsletter

- **Ametek Is Shaped By 80 Acquisitions**
- **Ametek Bought Magnetrol and Two Other Companies Last Year**
- **Ametek Magnetrol is a Leader in Hot Market Niches Such as SMR and Hydrogen**
- **CD&R Buys Pumps and Flow Control Businesses of Roper**
- **Nitto Buys Bend**
- **Dover Buys Malema, a Flow Measurement Company With \$45 Million In Revenue**

(Note that purchase price, revenues, applications and strategy are often provided only at the time of acquisition. So, the acquisition data is key to market niche evaluation)



Forecasts of purchases by largest customers are also included.

Food Manufacturers 2018 Guide, Control and Measure Purchases - \$ millions					
	ADM	Anheuser Busch	Cargill	Coca Cola	Con Agra
Total	30	40	25	40	9.5
• Guide	9				3
○ Americas	5				3
○ EMEA	2				0
○ Asia	2				0
• Control	15				3
○ Americas	7.5				3
○ EMEA	3.5				0
○ ASIA	4				0
• Measure	6				1.5
○ Americas	4				1.5
○ EMEA	1				0
○ Asia	1				0

Forecasts for 550 Purchasers

Industry	No. Included
Total	555
Chemical	40
Electronics	15
Food	40
Metals	30
Mining	20
Oil and Gas	50
Pharmaceutical	30
Power	70
Pulp & Paper	50
Refinery	60
Stone	50
Wastewater	50
Water	50

Networking Directory

Contacts at the IIOT companies and the customers are provided in this continuously updated directory

Samples are shown at [View and Correct Your Product Listings](#)

- **Search by Company Name**
- **Product Analysis by Financial Entity**

Search Companies by Service

- **Search by State - Company Name Order**
 - **Search by Person Name**

**Search by Country
or
Country And Service**

