

6. Instrumentation and Industrial Process Control Systems

a) The Opportunity

The total Australian market for industrial process controls in 1980 was approximately \$200 million. Projections suggest that the market will grow at an average rate of eight-to-10 per cent and exceed \$260 million by the end of 1983.

Key factors in market growth include an expansion of the primary metals, chemicals and allied products industries; increased government expenditures in the utilities sector; a move towards automation; the opening of a number of coal mines in New South Wales; and gas and oil exploration in Western Australia. At this time, electronic and electric instruments account for 45 per cent of the market and non-electronic/non-electric instruments constitute another 25 per cent of sales. Control valves constitute 21 per cent of total sales while sales of process control computers and peripherals have a nine per cent share of the market.

Ninety per cent of Australia's demand for industrial process controls is met by imports. The industry sectors that exhibit excellent potential for Canadian suppliers include electric power generation, transmission and distribution, industrial heavy chemicals manufacturing, and smelting and refining of non-ferrous metals. As the influence of computer technology penetrates electronic and electrical process control instrumentation in Australia, Canada will be in an even better position due to the technological advantage it has in sectors such as pipeline, automation, and power-generation controls.

Consequently Canadian firms should be able to market several products successfully in Australia during the 1980s. In the area of sensing and measuring instruments, the sales potential of temperature-flow and liquid-level devices is good due to the number of new aluminum smelters and power stations that are expected in the 1980s. On-line chemical composition analysis is also an area that should have potential for foreign companies. That assessment is based on the expansion plans for the chemical industry and the expansion forecast for the non-ferrous smelting and refining industry.

The application of microelectronics will be a major growth area of industrial process control systems this decade. Australian industry recognizes the enormous benefits to be obtained from computer-based process control systems.