

INTERNATIONAL MARKETING STRATEGY

PRIORITY SECTOR: INSTRUMENTATION

PURPOSE: **To focus and enhance trade development in support of the instrumentation sector**

SECTOR DESCRIPTION:

- Industrial Process Control
- Building Automation, Security and Alarm Systems
- Test and Measuring Equipment
- Scientific, Medical and Laboratory Instrumentation
- Meteorological and Environmental Instruments, and
- Geological/Geophysical Apparatus and Services
- Photonics

Within these sub-sectors are a broad range of computer-based control, automation, monitoring and supervisory systems used in applications such as pulp and paper, gas and oil, steel, mining, petrochemical, chemical, food processing, transportation, electric power, water and sewage treatment and other primary and secondary industries.

Also included are electrical/electronic measuring and analytical instruments used in medicine, scientific laboratories, pollution detection and control, geophysical explorations for natural resources and in weather forecasting. Among additional applications the sector embraces energy management systems in large buildings, traffic controls, fire alarm and security devices and educational aids and implements used in teaching of electrical/electronics and computer science courses.

Historically, the growth and prosperity of the sector has been dependent upon the relative commercial well-being of the primary and secondary industries that it serves. The Canadian Instrumentations Industry, to a large extent, reflects the history of development of Canada's mineral resources and of its industrial infrastructure.

The sector consists of 250 to 300 export-ready companies. Approximately 50% of these companies are located in Ontario, 20% in Quebec and 25% in Western Canada. The sector is highly fragmented. 50% of the companies generate revenues of less than \$4.0 million per annum. Many of them are competing with parallel