The 2011
Economic Development
City-Wide Highlights
Bayfront Industrial District
Bayfront Development Highlights

- Vopak Canada
- ArcelorMittal Dofasco
- CareGo Holdings Inc
- Max Aicher North America (MANA)*
- McAsphalt Industries Ltd
- Parrish and Heimbecker *
- Bermingham Foundation Solutions*
- Fluke Transportation*
- Lafarge *
- James Richardson International*
Downtown Development Highlights
Downtown Development Highlights

- CBC digital news service outlet *
- Chuck Gammage Animation *
- Lister Block
- New Horizon Homes *
- Pipeline Studios *
- Southern Ontario College (SOC)
- Staybridge Hotel *
- Treble Hall *
- Witton Lofts *
Ancaster Business Park
<table>
<thead>
<tr>
<th>Project</th>
<th>Square Footage</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMTS*</td>
<td>212,000 s.f.</td>
</tr>
<tr>
<td>Act Labs*</td>
<td>200,000 s.f.</td>
</tr>
<tr>
<td>Maidstone Coffee</td>
<td>80,000 s.f.</td>
</tr>
<tr>
<td>Everest Manufacturing *</td>
<td>30,000 s.f.</td>
</tr>
<tr>
<td>Audcomp</td>
<td>40,000 s.f.</td>
</tr>
<tr>
<td>1480 Sandhill Phase I</td>
<td>40,000 s.f.</td>
</tr>
<tr>
<td>1500 Sandhill Phase II *</td>
<td>40,000 s.f.</td>
</tr>
</tbody>
</table>
Red Hill Business Park

MAKE IT
in one of Canada’s fastest growing food processing sectors

HAMILTON ECONOMIC DEVELOPMENT

Hamilton Economic Development
www.investinhamilton.ca
Maple Leaf Foods
www.mapleleaf.ca
Hamilton Wins!

MAPLE LEAF NEW BUILD
<table>
<thead>
<tr>
<th>Business Name</th>
<th>Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carstar Head Office</td>
<td>16,000 s.f.</td>
</tr>
<tr>
<td>C-Hotel Carmens</td>
<td>48,000 s.f.</td>
</tr>
<tr>
<td>Fortinos Head Office</td>
<td>50,000 s.f.</td>
</tr>
<tr>
<td>Canada Post</td>
<td>40,000 s.f.</td>
</tr>
<tr>
<td>Financial Wellness Centre</td>
<td>10,000 s.f.</td>
</tr>
<tr>
<td>Country Wide Recycling</td>
<td>60,000 s.f.</td>
</tr>
<tr>
<td>Canada Bread</td>
<td>388,000 s.f.</td>
</tr>
<tr>
<td>Maple Leaf Foods</td>
<td>498,500 s.f.</td>
</tr>
</tbody>
</table>
Stoney Creek Business Park
SC Development Highlights

- Union Gas * 40,000 s.f.
- Losani Homes Office * 30,000 s.f.
- Janco Steel 70,000 s.f.
- Earl Paddock 130,000 s.f.
- Liburdi Engineering * 35,000 s.f.
- Mohawk College $16.5 Million
2011 – SBEC’s Record Year

SMALL BUSINESS ENTERPRISE CENTRE
Small Business Highlights

Total Jobs Created 940
Total General Enquiries 42,441
Client 1-on-1 Consultations 1,169
Number of Seminars 56
Professional Mentoring 90
# of Events / Attendance 9/5,960
CYBF Total Lending $230,000
Retention Statistic 85%
The 2012 Economic Development Pipeline
1.6 Million s.f. of Non-Residential Growth

- Maple Leaf Foods (Glanbrook) 498,500 s.f.
- AMTS (Ancaster Bus Park) 212,000 s.f.
- Activation Labs (Ancaster Bus Park) 200,000 s.f.
- Union Gas (Stoney Creek) 40,000 s.f.
- Lowe’s (Ancaster) 140,000 s.f.
- Earth Fresh Foods (Flamborough) 40,000 s.f.
- MARC (Ward 1 @ MIP) 80,000 s.f.
- Target Stores (5 conversions) $54 Million
- Institutional 282,703 s.f.
- Commercial 135,040 s.f.
2012 Pipeline of Downtown Developments

- 300 to 500 multi-residential housing starts in downtown Hamilton
- Ground breaking for McMaster Health Centre in 2012
- Grocery store development commitment
- Biggest year ever for applications to the programs
- Development of strategy for new programs serving the community downtowns
Economic Development in Hamilton

2011

BY THE NUMBERS
2011 Economic Development

- Diversity Index: 0.92
- Total Building Permits: $731M
- Non-Res Development: 21%
- Industrial Vacancy Rate: 3.4%
- Industrial Absorption: 995K s.f.
- Downtown Vacancy Rate: 12%
- Employed Population FT/PT: 80/20
- Unemployment Rate 2011: 6.3%
Diversity Index, 2010

0.92
Hamilton

- Highly diverse = 1
- Not diverse = 0

Sources: Statistics Canada; The Conference Board of Canada
2011 Economic Development

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Economic Growth

City of Hamilton Building Permits (All categories)
2002 to 2011

In millions:

- 2002: $600 million
- 2003: $700 million
- 2004: $700 million
- 2005: $650 million
- 2006: $750 million
- 2007: $800 million
- 2008: $850 million
- 2009: $800 million
- 2010: $1,200 million
- 2011: $800 million

Yearly trend shows a general increase in building permits from 2002 to 2011, with a sharp peak in 2010.
2011 Economic Development

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2011 Residential vs. Non-Residential Growth

**Brampton**
- Res = 80%  
  Non-Res = 9.5%

**Halton**
- Res = 68%  
  Non-Res = 15%

**Hamilton**
- Res = 59%  
  Non-Res = 21%
2011 Economic Development

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Q4 - 2011 Industrial Vacancy Rates

Source: Colliers GTA Industrial Statistics Report
## 2011 Economic Development

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Diversity Index</td>
<td>0.92</td>
</tr>
<tr>
<td>Total Building Permits</td>
<td>$731M</td>
</tr>
<tr>
<td>Non-Res Development</td>
<td>21%</td>
</tr>
<tr>
<td>Industrial Vacancy Rate</td>
<td>3.4%</td>
</tr>
<tr>
<td><strong>Industrial Absorption</strong></td>
<td>995K s.f.</td>
</tr>
<tr>
<td>Downtown Vacancy Rate</td>
<td>12%</td>
</tr>
<tr>
<td>Employed Population FT/PT</td>
<td>80/20</td>
</tr>
<tr>
<td>Unemployment Rate 2011</td>
<td>6.3%</td>
</tr>
<tr>
<td>City</td>
<td>Q4-2010 Total Available s.f.</td>
</tr>
<tr>
<td>----------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>Brampton</td>
<td>6,130,249</td>
</tr>
<tr>
<td>Burlington</td>
<td>1,736,286</td>
</tr>
<tr>
<td>Mississauga</td>
<td>11,081,686</td>
</tr>
<tr>
<td>Oakville</td>
<td>1,237,492</td>
</tr>
<tr>
<td>Hamilton</td>
<td>2,307,030</td>
</tr>
</tbody>
</table>

Source: Colliers GTA Industrial Statistics Report
2011 Economic Development

- Diversity Index 0.92
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- Non-Res Development 21%
- Industrial Vacancy Rate 3.4%
- Industrial Absorption 995K s.f.
- **Downtown Vacancy Rate** 12%
- Employed Population FT/PT 80/20
- Unemployment Rate 2011 6.3%
Downtown Vacancy Rate

- 2009: 15%
- 2010: 13%
- 2011: 12%
• Diversity Index 0.92
• Total Building Permits $731M
• Non-Res Development 21%
• Industrial Vacancy Rate 3.4%
• Industrial Absorption 995K s.f.
• Downtown Vacancy Rate 12%
• **Employed Population FT/PT** 80/20
• Unemployment Rate 2011 6.3%
### Employed Population - FT vs. PT

#### Hamilton CMA

<table>
<thead>
<tr>
<th>Annual Averages</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>79.2%</td>
<td>79.8%</td>
<td>80.0%</td>
<td>79.7%</td>
</tr>
<tr>
<td>Part Time</td>
<td>20.8%</td>
<td>20.2%</td>
<td>20.0%</td>
<td>20.3%</td>
</tr>
</tbody>
</table>

*Source: Statistics Canada, Employed population for Hamilton Census Metropolitan Area*
2011 Economic Development

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- Unemployment Rate 2011 6.3%
Unemployment Rates

2011 Averages

- Hamilton: 6.3%
- Kitchener: 6.7%
- London: 8.8%
- Oshawa: 8.4%
- St. Cath/Niagara: 8.7%
- Windsor: 9.8%
- Ontario: 7.8%
- Canada: 7.5%
Our Economic Development Goals

REAL ESTATE SERVICES
2011 Real Estate Highlights

- Total Dispositions $2,330,440
- Total Acquisitions $10,889,300

Commissions (Leases) $179,310
Commissions (Purchases) $435,575
Commissions (Land Sales) $93,216
Savings on Appraisals $60,000

Total Savings 2011 $768,098
Our Economic Development Goals

BUSINESS RETENTION & EXPANSION
• 77.5% of Companies plan to introduce new products in the next 2 years

• Companies Primary Market
  – Local 11.8%
  – Regional 45.6%
  – National 17.8%
  – International 24.9%

• Companies Sales
  – Decreasing 3.7%
  – Increasing 60.2%
  – Stable 36.0%
Our Economic Development Goals

2010 – 2015

ECONOMIC DEVELOPMENT STRATEGY UPDATE
## ED Strategy Deliverables

<table>
<thead>
<tr>
<th>Strategy Components</th>
<th>Short Term</th>
<th>Long Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Infrastructure for Innovation</td>
<td>15/25</td>
<td>9/18</td>
</tr>
<tr>
<td></td>
<td>(60%)</td>
<td>(50%)</td>
</tr>
<tr>
<td>Community Development</td>
<td>26/38</td>
<td>7/19</td>
</tr>
<tr>
<td></td>
<td>(68%)</td>
<td>(37%)</td>
</tr>
<tr>
<td>Quality of Life</td>
<td>25/49</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(51%)</td>
<td></td>
</tr>
<tr>
<td>Workforce Development</td>
<td>5/6</td>
<td>Phases Completed</td>
</tr>
<tr>
<td>Business Development</td>
<td>44/84</td>
<td>8/25</td>
</tr>
<tr>
<td></td>
<td>(52%)</td>
<td>(32%)</td>
</tr>
<tr>
<td><strong>Total (2 years)</strong></td>
<td>110/196</td>
<td>24/62</td>
</tr>
<tr>
<td></td>
<td>(56%)</td>
<td>(39%)</td>
</tr>
</tbody>
</table>
Our Economic Development Goals

CHANGING HAMILTON’S IMAGE
Awards & Recognitions

• Ranked #2 location in Canada for Corporate Investment by Atlanta based Site Selection Magazine

• The Hamilton metropolitan area ranks in top 100 of the world’s largest centres for its economic performance over the past two years

• Hamilton was ranked as the top City in Ontario in which to invest & #3 in Canada by the Real Estate Investment Network

• In the last 3 years, Hamilton has had more non-residential building permits than Mississauga & Brampton
Awards & Recognitions

• In 2011, Downtown Hamilton added 320 new jobs in the Creative Industries cluster.

• Hamilton Health Sciences ranks 7th in the world among the best Research Hospitals.

• McMaster University ranks 16th in the world amongst the Top 50 “Pre-Clinical & Health Universities.”

• Cargo shipments to & from the Port of Hamilton generate $5.9 billion of economic activity.
THANK YOU

Neil Everson
Director
Economic Development Division
Planning & Economic Development Department
City of Hamilton

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Web: investinhamilton.ca