Defining and Quantifying Canada’s Manufacturing Automation Industry

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Trillium Network for Advanced Manufacturing
Growth Segments
Industry 4.0
Skills & Talent
Asset Mapping

Outputs
Company & Partner Profiles
Industry & Thematic Reports
Trillium GIS
Presentations

Initiatives
Data Collection & Analysis
Company Profiles
Partner Profiles
Meetings & Consultations

Audiences
Government
Industry Associations
Manufacturers
Partner Organizations
Canadian Manufacturing GDP (2019)

- Motor Vehicles - $6.5B
- Motor Vehicle Parts - $8.9B
- Aerospace - $8.2B
- Automation (MFG) - $7.2B
<table>
<thead>
<tr>
<th>Industry</th>
<th>GDP (2019)</th>
<th>% OUTPUT TO MFG</th>
<th>ESTIMATED GDP FROM MFG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industrial Machinery Manufacturing (NAICS 3332)</td>
<td>$2.21B</td>
<td>48.16%</td>
<td>$1.06B</td>
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<tr>
<td>Metalworking Machinery Manufacturing (NAICS 3335)</td>
<td>$2.37B</td>
<td>71.26%</td>
<td>$1.69B</td>
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<tr>
<td>Other Machinery Manufacturing (NAICS 3339)</td>
<td>$4.24B</td>
<td>44.42%</td>
<td>$1.88B</td>
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<tr>
<td>Architectural, Engineering, and Related Services (NAICS 5413)</td>
<td>$25.24B</td>
<td>7.32%</td>
<td>$1.85B</td>
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<tr>
<td>Computer Systems Design and Related Services (NAICS 5415)</td>
<td>$32.65B</td>
<td>2.25%</td>
<td>$0.74B</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$7.22B</strong></td>
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</table>
MFG Automation Contributions to GDP, 2010-2019

Industrial Machinery Manufacturing (NAICS 3332)
Metalworking Machinery Manufacturing (NAICS 3335)
Other Machinery Manufacturing (NAICS 3339)
Architectural, Engineering and Related Services (5413)
Computer Systems Design and Related Services (5415)
Canada’s Manufacturing Automation Industry

- $7.22B – Annual Contributions to Canadian GDP
- 58K – Canadian Employment (52% in Ontario)
- >500 – Ontario Companies
- $71K – Average Annual Earnings/Employee
Next Steps

• Refine and update model as needed

• Continue to build company database

• Trade patterns

• Markets/customers

• Qualitative analysis (e.g. profiles) of Ontario automation companies
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