ACTIVITY UPDATE

LONDON ECONOMIC DEVELOPMENT CORPORATION (LEDC)

www.ledc.com
519 661 4545 | info@ledc.com

Come for Business. Stay for Life.
What is the LEDC?

The London Economic Development Corporation (LEDC) is the primary economic development agency in the city of London, and is a partnership between the City of London and the private sector. The LEDC is improving the economic well-being of Londoners through the growth and expansion of local businesses and the attraction of new businesses to London. We aim to add to the strengths of the London business environment making our city an attractive place to live, work and operate a business.

What does the LEDC do?

The LEDC provides a number of economic development services including:

» Attracting new business and foreign direct investment to London
» Retaining existing business and assisting with local expansions
» Advocating for improving the business climate in London
» Providing workforce development leadership to connect businesses with education institutes and employment sector agencies
» Marketing and promote London for business opportunities in overseas markets
» Establishing business support partnerships throughout the community
» Assisting the city of London in development of strategic plans such as industrial lands

What does success look like?

SINCE INCEPTION, $7 MILLION IN ANNUAL PROPERTY TAX REVENUE
SINCE INCEPTION, $1.2 BILLION IN NEW INVESTMENT
SINCE INCEPTION, 9000+ JOBS CREATED
Who is the LEDC?

The LEDC Team

The LEDC employs experienced professionals who provide information, advice and assistance at every stage of business planning and investment. We provide information and identify solutions that help to enhance business prospects.

Board of Directors

The LEDC is led by a strong board of accomplished business, education and community leaders.

Mr. Gerald Slemko  
Chair, Chelsey Corporation

Dr. John Capone  
Vice-President (Research), Western University

Mr. James Crich  
President, Auburn Developments Inc.

Mr. Marvin DeVries  
President, Trojan Technologies

Ms. Shantal Feltham  
President, Stiris Research Inc.

Mr. Joe Fontana  
Mayor, City of London

Mr. Keith Gibbons  
President, McCormick Canada Co.

Mr. Blair Poetschke  
Director, Ontario Ministry of Economic Development, Trade and Employment

Dr. Howard Rundle  
President Emeritus, Fanshawe College

Mr. Michael Schmalz  
President, Digital Extremes

Mr. Brian Semkowski  
Principal, Southwest Sun

Dr. Anne Snowdon  
Richard Ivey School of Business

Mr. Howard Thompson  
Senior Vice-President Western Ontario Region, TD Bank Group

Mr. Marty Thrasher  
President, FMT Consulting
Business Attraction & Foreign Direct Investment

Each year, the LEDC submits hundreds of proposals to potential investors. It is not uncommon for projects to take 3-5 years from initial contact to securing a business investment. Throughout the client engagement period, LEDC provides assistance with site selection, servicing, workforce and regulatory approvals.

Through LEDC efforts this year to date, over $100 million has been invested in London from new foreign direct investment and existing plant expansions.

North American Firsts

- **Dr. Oetker (Germany)**
  First North American frozen pizza manufacturing plant and one of the largest food companies in Europe

- **Natra (Spain)**
  First North American chocolate processing plant

- **Fraunhofer Project Center (Germany)**
  First Canadian R&D facility to develop composite materials

- **Brose (Germany)**
  First Canadian automotive parts plant that employs over 800 people

- **Hanwha (Korea)**
  First Canadian building products manufacturing facility

- **Arvin Sango (Japan/USA)**
  First Canadian automotive parts facility to supply parts to Toyota

- **Transform Automotive (USA)**
  First Canadian automotive parts facility

### Activities to Date

<table>
<thead>
<tr>
<th>Year</th>
<th>Investment</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>$100 mil.</td>
<td>1200</td>
</tr>
<tr>
<td>2012</td>
<td>$160 mil.</td>
<td>1600</td>
</tr>
<tr>
<td>2011</td>
<td>$311 mil.</td>
<td>750</td>
</tr>
</tbody>
</table>

### Testimonial: London Chamber of Commerce

“In the midst of difficult economic times for the City, the London Chamber of Commerce feels that it is important to recognize the success stories of new business that have been attracted to London and new jobs that have been created by companies already here. But this work goes well beyond just the great companies that have chosen to locate in London as a result of the LEDC’s efforts, i.e. The Cakery, Dr. Oetker, Hanwa, and many more. Indeed, many of London’s recent and future opportunities can be tied directly to the involvement and hard work of the London Economic Development Corporation.”

Mr. Gerry Macartney, President
London Chamber of Commerce
Business Retention & Expansion

LED C assisted over 25 companies in accessing more than $5 million in funding from programs including CME-Smart, IRAP, SWODF and more.

Growing Businesses

Through the business retention portfolio, LEDC assists local businesses with expansions and retention issues. Our team works closely with our existing London companies to provide a wide range of services, including:

» Development of new export markets
» Assistance with market research
» Providing training and networking resources
» Providing potential business alliances
» Assistance with site relocations and expansions
» Facilitating municipal and other governmental regulatory approvals
» Facilitating talent development through partnerships with education providers as well as employment sector agencies

Expansion Highlights

» Centennial Windows
» HCL Logistics
» StarTech.com
» Alliance iCommunications

Testimonial: Kongsberg Protech Systems

“We are excited by the welcome we have received, and the support we have received from the Ministry of Economic Department and Trade in Ontario and London Economic Development Corporation. We are looking forward to expanding our business in Canada, which is an important market for us, and we strongly believe this new venture is the right move for our company. Canada offers very competitive conditions for development and production internationally, and London offers a highly skilled and competent workforce.”

Mr. Egil Haugsdal, President
Kongsberg Protech Systems, Norway
The Workforce Development portfolio actively supports the attraction, growth and retention activities of the LEDC team. This includes working with community partners, employer groups and funding sources to:

» Develop local labour market information
» Retain post secondary students
» Attract and utilize skilled immigrants
» Develop various transition-to-work initiatives to ensure supply of trained workers to meet employer needs

**Leaders in Workforce Development**

**Grow your future in London**

- Affordable cost of living
- Vibrant arts and entertainment scene
- Short commute times and great work life balance
- Largest free Wi-Fi network in Canada
- Career opportunities with innovative global companies
- Hub of creative and cultural activity
- Variety of programs for sports and recreation

www.LEDC.com

Facebook: /LondonEDC  Twitter: @LondonEDC

<table>
<thead>
<tr>
<th>ATTRACTION SUPPORT</th>
<th>24</th>
</tr>
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<tbody>
<tr>
<td>Employer Consultations</td>
<td>100</td>
</tr>
<tr>
<td>Workforce Projects</td>
<td>7</td>
</tr>
<tr>
<td>Job Seeker Consultations</td>
<td>150</td>
</tr>
<tr>
<td>Job Seeker Initiations</td>
<td>50</td>
</tr>
</tbody>
</table>
Collaborative Workforce Initiatives Include:

» Labour Market Information Development: Website, www.worktrends.ca is a community based data consortium to support the coordinated collection and dissemination of local economic data, business conditions and labour market information.

» Post Secondary Student Retention: The annual Student 2 Business Career Networking Conference and the BizInc entrepreneur development initiative works to launch young careers in our community.

» Global Talent Attraction and Retention: The LEDC supports London’s welcoming efforts through support of the London Middlesex Immigrant Employment Council, its individual and group mentorship programs and the Job Match Network initiative.

» Employer and Jobseeker Support activities: The LEDC has provided more than 100 individual company consultations and over 150 jobseeker consultations on workforce matters, as well as maintained two employment programs www.HireOneLondon.ca and www.LondonTechJobs.ca. The most viewed section of the LEDC website is the Business Directory, it has become a key resource to companies and jobseekers.
Partnered for Success

LEDC creates significant direct and indirect economic activity in the city of London. We work collaborate with many partners throughout the community to ensure effective service delivery to client companies. Our partners such as City of London, TechAlliance, Small Business Centre, London International Airport, BizInc, Stiller Centre and the London Chamber of Commerce are supported by LEDC to serve clients in their unique segments. Successful partnerships like these result in economic prosperity in the city of London.

Regional Collaborations Include:

» Canada’s London
» Southwest Economic Alliance
» Ontario Automotive Communities Alliance
» Ontario Food Cluster
» Ontario Technology Corridor

BizInc

BizInc is an initiative mandated to seek-out, support and promote student entrepreneurs. Located at Western University & Fanshawe College, BizInc is a student incubator helping turn business ideas into workable realities. The LEDC helped facilitate the BizInc enterprise from concept to pilot status, through obtaining Communities in Transition funding from the Ministry of Economic Development, Trading and Employment and contributing financially to operations. LEDC actively participates on the advisory committee, stewardship of funding, promotion and support of activities on campuses and in the community.
International Water Centre of Excellence

Water is an extremely important resource around the world. The treatment for clean drinking water continues to be a priority. The International Water Centre of Excellence (IWCE) sets London apart from other jurisdictions and is used by LEDC to promote London around the world. The IWCE is a one of a kind partnership between Western University, the City of London and local industry.

The IWCE is a globally unique and leading site for water treatment technology development, commercialization, validation and testing

» Full-scale development/testing of new technologies related to wastewater treatment, nutrient recovery and energy production from municipal waste
» Shorten the time to market for these new technologies and provide the critical link between the private and public sectors

Fraunhofer Project Centre at Western University

Fraunhofer Project Centre (FPC) is a partnership between Western University and Germany’s renowned Fraunhofer Institute, focusing on applied research in the fields of developing composite materials, methods and manufacturing technologies.

» The FPC accelerates the adoption of advanced lightweight composite technologies (carbon and long fibre)
» Research trails in industrial scale
» Companies conducting collaborate research own the intellectual property

Fraunhofer is an important attraction tool for LEDC to market London around the world. As the auto sector focuses on weight reduction and lightweight materials, Fraunhofer is getting worldwide recognition resulting in greater prospects of London landing more related investments.

Fraunhofer’s role is to assist companies in identifying suitable light weight alternatives to steel, and then develop a process to mass produce those new materials. The work Fraunhofer is doing in London has applications outside of automotive including the defence, aerospace and advanced manufacturing sectors.

Testimonial: Brose

Our decision to construct a facility in London was based on a very competitive business environment, and the strong support we have received from the London Economic Development Corporation.

Mr. Michael Stoscek, President
Brose Fahrzeugteile GmbH
Strategic Projects

401/402 Gateway Development

London’s location along the NAFTA (North American Fair Trade Agreement) superhighway continues to be an important consideration for investment attraction. Sites such as Innovation Park located along Veterans Memorial Parkway and the 401/402 gateway have been successful in attracting multinational companies such as Dr. Oetker and Hanwha. The air cargo terminal at the London International Airport continues to be successful and has achieved 65% occupancy with 70 employees in the transportation sector. The LEDC continues to market London’s gateway advantage around the world.

Digital Media Centre

As the Fanshawe College downtown campus for the Centre for Digital and Performance Arts nears completion, discussions continue regarding the creation of a digital media centre. With the support from industry partners providing access to new technology platforms, this centre is poised to further develop the digital interactive media cluster in London.

Testimonial: London International Airport

“The London International Airport has developed a strong relationship with the LEDC,” said Mike Seabrook, President of London International Airport. “The LEDC has helped open doors internationally by making introductions and assisting in building relationships with new strategic partners. The LEDC has played an important role in the success of the Air Cargo Terminal as well as the local collaboration with Fanshawe College.”

Mr. Mike Seabrook, President
London International Airport
Marketing & Communications

What we do

The marketing and communications portfolio advises and supports two main audiences, our local or internal economy and our external economy. Primary to the portfolio is executing a strong communications strategy that helps generate business leads as well as builds the reputation of LEDC. We provide support of existing businesses, build relationships, market and promote London for business opportunities around the world.

Recent Honours and Awards

- **#1** MARKETING CAMPAIGN OF THE YEAR “HIRE ONE” 2012, EDCO
- **#1** LIEUTENANT GOVERNOR’S AWARD FOR MARKETING EXCELLENCE 2 CONSECUTIVE YEARS 2012, EDCO
- **#1** BEST USE OF MARKETING UTILIZING DIGITAL MEDIA “TODAY + TONIGHT” 2012, EDCO
- **#1** CANADA RANKED #1 FOR BUSINESS INVESTMENT 2011, FORBES MAGAZINE

  - “a comprehensive campaign...good concept with live tracking.”
  - EDCO, 2012

- **#2** LONDON RANKED #2 MID-SIZED CITY OF THE FUTURE 2013, FDI MAGAZINE
- **top 10** LONDON RANKED top 10, BEST FDI STRATEGY 2013, FDI MAGAZINE

- **Moody’s AAA** CANADA RANKED #1 FOR BUSINESS INVESTMENT 2011, FORBES MAGAZINE
- **top 10** LONDON RANKED top 10, BEST ECONOMIC POTENTIAL 2013, FDI MAGAZINE
- **top 10** LEDC RANKED top 10, BEST ECONOMIC DEVELOPMENT AGENCY 5 CONSECUTIVE YEARS 2012, SITE SELECTION MAGAZINE
- **top 10** LONDON RANKED top 10, BEST BUSINESS FRIENDLINESS 2013, FDI MAGAZINE

@LondonEDC on Twitter

**1000+ new followers (May-Oct 2013)**

**479 interactions in September 2013 alone**

**translating into 1.4+ million impressions**
How we do what we do

TRADITIONAL MEDIA
HITS!

PARTNERSHIPS & COLLABORATIONS
actively SUPPORT over 40 Partnership Initiatives!

MARKET & PROMOTE
London, Canada
Provide support and materials for all portfolios

E-NEWSLETTER
Sent to over 5000 recipients internationally

SERVING SECTORS
CAMPAIGN SPECIFIC

80,422
17,358

WEBSITES

Launched a NEW LEDC WEBSITE with multi lingual capabilities in spring 2013

FROM JAN 2013 TO OCT 2013:
80,422 unique visits to 9 websites serving different sectors.
17,358 unique visits to 4 event and campaign specific websites.

Social Media
25% followers increased by 25% in 2013

221,000
“Perspective London” insert in Globe and Mail distributed to 221,000 subscribers

40+
TRADITIONAL MEDIA HITS!

5000!
E-NEWSLETTER

5000!

LONDON, CANADA
Come for Business. Stay for Life.

SUCCESSFUL EVENTS

6 SIGNATURE EVENTS

Student 2 Business Conference
Record Attendance in 2013

2013
450
350
250
‘11 ‘12 ‘13

13!
160+

5000!

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# Economic Indicators

## Chart 1 | Population and Employment (in 000’s)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>409.7</td>
<td>413.8</td>
<td>417.4</td>
</tr>
<tr>
<td>Labour Force</td>
<td>263.7</td>
<td>267</td>
<td>268.8</td>
</tr>
<tr>
<td>Employment</td>
<td>241.5</td>
<td>241.9</td>
<td>246.1</td>
</tr>
<tr>
<td>Unemployment Rate</td>
<td>8.4</td>
<td>9.4</td>
<td>8.4</td>
</tr>
<tr>
<td>Participation Rate (%)</td>
<td>64.4</td>
<td>64.5</td>
<td>64.4</td>
</tr>
<tr>
<td>Employment Rate (%)</td>
<td>58.9</td>
<td>58.5</td>
<td>59</td>
</tr>
</tbody>
</table>

Source: Statistics Canada

## Chart 2 | Employment London CMA (in 000’s)

<table>
<thead>
<tr>
<th>Total Employed</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Employed</td>
<td>244.9</td>
<td>242.9</td>
<td>247.8</td>
</tr>
<tr>
<td>Goods-Producing Sector</td>
<td>48.9</td>
<td>48.5</td>
<td>48.9</td>
</tr>
<tr>
<td>Agriculture</td>
<td>3.2</td>
<td>2.1</td>
<td>2.5</td>
</tr>
<tr>
<td>Forestry, Fishing, Mining, Quarrying, Oil &amp; Gas</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Utilities</td>
<td>-</td>
<td>-</td>
<td>2.2</td>
</tr>
<tr>
<td>Construction</td>
<td>15.1</td>
<td>14.7</td>
<td>13.4</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>29.1</td>
<td>30.2</td>
<td>30.1</td>
</tr>
<tr>
<td>Services-Producing Sector</td>
<td>196</td>
<td>194.4</td>
<td>198.9</td>
</tr>
<tr>
<td>Trade</td>
<td>35</td>
<td>34.7</td>
<td>35.9</td>
</tr>
<tr>
<td>Transportation &amp; Warehousing</td>
<td>11.1</td>
<td>9.7</td>
<td>11.6</td>
</tr>
<tr>
<td>Finance, Insurance, Real Estate &amp; Leasing</td>
<td>19</td>
<td>20.7</td>
<td>19</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>13.2</td>
<td>14.9</td>
<td>17.1</td>
</tr>
<tr>
<td>Business, Building &amp; Other Support Services</td>
<td>14.5</td>
<td>11.8</td>
<td>11.3</td>
</tr>
<tr>
<td>Educational Services</td>
<td>24</td>
<td>23.4</td>
<td>21.3</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>36.5</td>
<td>36</td>
<td>35.9</td>
</tr>
<tr>
<td>Information, Culture &amp; Recreation</td>
<td>9.8</td>
<td>9</td>
<td>10.3</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>15.7</td>
<td>14.1</td>
<td>15</td>
</tr>
<tr>
<td>Other Services</td>
<td>10.2</td>
<td>12.5</td>
<td>10.9</td>
</tr>
<tr>
<td>Public Administration</td>
<td>7</td>
<td>7.6</td>
<td>10.5</td>
</tr>
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</table>

Source: Statistics Canada
Economic Indicators

Chart 3 | Housing Prices

<table>
<thead>
<tr>
<th></th>
<th>Detached Bungalow</th>
<th>Executive Detached 2-Storey</th>
<th>Luxury Condo.</th>
<th>Standard 2-Storey</th>
<th>Senior Executive</th>
<th>Standard Townhouse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mississauga</td>
<td>$478,500</td>
<td>$540,000</td>
<td>$388,000</td>
<td>$450,000</td>
<td>$750,000</td>
<td>$339,000</td>
</tr>
<tr>
<td>Brantford</td>
<td>$217,000</td>
<td>$324,000</td>
<td>n/a</td>
<td>$218,000</td>
<td>$345,000</td>
<td>$190,000</td>
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<tr>
<td>Ottawa</td>
<td>$609,000</td>
<td>$615,000</td>
<td>$500,000</td>
<td>$532,000</td>
<td>$835,000</td>
<td>$355,000</td>
</tr>
<tr>
<td>London 2013</td>
<td>$253,300*</td>
<td>$329,000</td>
<td>$265,200</td>
<td>$263,200*</td>
<td>$477,500</td>
<td>$171,000</td>
</tr>
<tr>
<td>*London 2012</td>
<td>$240,000</td>
<td>$316,500</td>
<td>$251,000</td>
<td>$251,300</td>
<td>$457,000</td>
<td>$164,300</td>
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</table>

Source: Royal Lepage, Quarter 1, 2012 and Quarter 1, 2013
* Quarter 3, 2013 (full census not yet available)

Chart 4 | Building Construction Activity (in $millions)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013 YTD</th>
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<tbody>
<tr>
<td></td>
<td>Permits</td>
<td>Value</td>
<td>Permits</td>
<td>Value</td>
</tr>
<tr>
<td>Residential</td>
<td>2930</td>
<td>$392.81</td>
<td>2390</td>
<td>$349.26</td>
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<tr>
<td>Commercial</td>
<td>474</td>
<td>$166.65</td>
<td>474</td>
<td>$102.37</td>
</tr>
<tr>
<td>Industrial</td>
<td>82</td>
<td>$36.37</td>
<td>94</td>
<td>$75.14</td>
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<tr>
<td>Institutional</td>
<td>201</td>
<td>$145.17</td>
<td>163</td>
<td>$477.84</td>
</tr>
<tr>
<td>Total</td>
<td>3687</td>
<td>$707.70</td>
<td>3121</td>
<td>$1,004.62</td>
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</table>

Source: City of London

Chart 5 | Vacancy Rates

<table>
<thead>
<tr>
<th></th>
<th>Q1, 2010</th>
<th>Q1, 2011</th>
<th>Q1, 2012</th>
<th>Q1, 2013</th>
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<tbody>
<tr>
<td>Industrial</td>
<td>0.11</td>
<td>0.113</td>
<td>0.101</td>
<td>0.098</td>
</tr>
<tr>
<td>Office</td>
<td>0.142</td>
<td>0.142</td>
<td>0.143</td>
<td>0.137</td>
</tr>
</tbody>
</table>

Source: CBRE Limited

Chart 5 | Gross Domestic Product (in $millions)

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP at Basic Prices</td>
<td>17,620</td>
<td>17,799</td>
<td>18,006</td>
</tr>
<tr>
<td>% Change</td>
<td>2.2</td>
<td>1.0</td>
<td>1.2</td>
</tr>
</tbody>
</table>

Source: The Conference Board of Canada
Economic Sectors

**Advanced Manufacturing**
- Food and beverage processing
- Automotive components
- Defence suppliers
- Green technology

*Key London Companies Include:*
*3M Canada, Cargill, Kellogg’s, CoorsTek*

**IT/Digital Interactive**
- Digital media
- Game development
- Financial solutions software
- Data centres

*Key London Companies Include:*
*Digital Extremes, Big Blue Bubble, IBM, Embium, Cineplex Digital Solutions*

**Life Sciences**
- Medical devices
- Imaging and diagnostics
- R&D institutes
- Pharma

*Key London Companies Include:*
*Stiris Research Inc., Trudell Medical International, London Health Sciences Centre, St. Joseph’s Heath Care London*

**Educational & Financial Services**
- Western University
- Fanshawe College
- Collège Boréal
- Head offices

*Key London Companies Include:*
*TD Canada Trust, Libro Financial Group, London Life*
ACTIVITIES OF THE LEDC
THE LONDON ECONOMIC DEVELOPMENT CORPORATION

SUPPORT & DEVELOP SECTORS
300+ IT COMPANIES
8000+ IT EMPLOYEES

WORKFORCE
1600 NEW JOBS ATTRACTED IN 2012

BUSINESS GROWTH & RETENTION
42 ACTIVE GROWTH PROJECTS IN 2012

PROGRAMS & INITIATIVES
HireOneLondon.ca
“MARKETING CAMPAIGN OF THE YEAR” - EDCO, 2012

NEW INVESTMENT ATTRACTION
160M FOREIGN DIRECT INVESTMENT, 2012

RESEARCH & ANALYSIS
24 INTERNATIONAL MARKET TRIPS

CONNECTORS & COLLABORATORS
62 ATTRACTION VISITS TO LONDON

PROMOTERS & ADVOCATES
11 EVENTS/CAMPAIGNS PARTICIPATED IN, 2012

CanadasLondon.ca
CITY WIDE CAMPAIGN WITH 9 CITY PARTNERS

EXPERTISE & ADVICE
#1 "MARKETING EXCELLENCE" BY ONTARIO’S GOVERNOR GENERAL EDCO 2012

LEADERSHIP & VISION
10 "TOP 10 ECONOMIC DEVELOPMENT AGENCY" 5TH CONSECUTIVE YEAR SITE SELECTION MAGAZINE, 2012

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