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LAEDC Kyser Center for Economic Research

GROWING TOGETHER

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and

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County



PREPARED BY:

Ferdinando Guerra, Associate Economist
Principal author and researcher

With special thanks to Elizabeth Avila for her research assistance.



Los Angeles County Economic Development Corporation
Kyser Center for Economic Research
444 S. Flower St., 37th Floor, Los Angeles, CA 90071
Tel: (213) 622-4300 or (888) 4-LAEDC-1
Fax: (213) 622-7100
E-mail: research@laedc.org
Web: <http://www.laedc.org>

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The LAEDC, the region's premier economic development leadership organization, is a private, non-profit organization established in 1981. The LAEDC's mission is to attract, retain, and grow business and jobs for the regions of Los Angeles County. Since 1996, the LAEDC has helped to retain or attract nearly 180,000 annual jobs in Los Angeles County with an estimated labor income, including wages and benefits, of nearly \$11 billion. Taken together with the supported indirect and induced economic activity, a total of more than 400,000 annual jobs with labor income of more than \$21 billion were impacted, accounting for an estimated \$850 million in property and sales tax revenues to the County of Los Angeles.

Regional Leadership

The members of the LAEDC are civic leaders and ranking executives of the region's leading public and private organizations. Through financial support and direct participation in the mission, programs, and public policy initiatives of the LAEDC, the members are committed to playing a decisive role in shaping the region's economic future.

Business Services

The LAEDC's Business Development and Assistance Program provides essential services to L.A. County businesses at no cost, including coordinating site searches, securing incentives and permits, and identifying traditional and nontraditional financing including industrial development bonds. The LAEDC also works with workforce training, transportation, and utility providers.

Economic Information

Through our public information and for-fee research, the LAEDC provides critical economic analysis to business decision makers, education, media, and government. We publish a wide variety of industry focused and regional analysis, and our Economic Forecast report, produced by the Kyser Center for Economic Research, has been ranked #1 by the Wall Street Journal.

Economic Policy And Analysis

The LAEDC Economic and Policy Analysis group offers thoughtful, highly-regarded economic and policy expertise to private- and public-sector clients. The LAEDC takes a flexible approach to problem solving, supplementing its in-house staff when needed with outside firms and consultants. Depending on our clients' needs, the LAEDC will assemble and lead teams for complex, long-term projects; contribute to other teams as a subcontractor; or act as sole consultant.

Leveraging our Leadership

The LAEDC operates the World Trade Center Association Los Angeles-Long Beach (WTCA L.A.-LB), which facilitates trade expansion and foreign investment, and the LAEDC's Center for Economic Development partners with the Southern California Leadership Council to help enable public sector officials, policy makers, and other civic leaders to address and solve public policy issues critical to the region's economic vitality and quality of life.

Global Connections

The World Trade Center Association Los Angeles-Long Beach works to support the development of international trade and business opportunities for Southern California companies as the leading international trade association, trade service organization and trade resource in Los Angeles County. It also promotes the Los Angeles region as a destination for foreign investment. The WTCA L.A.-LB is a subsidiary of the Los Angeles County Economic Development Corporation. For more information, please visit www.wtca-lalb.org.

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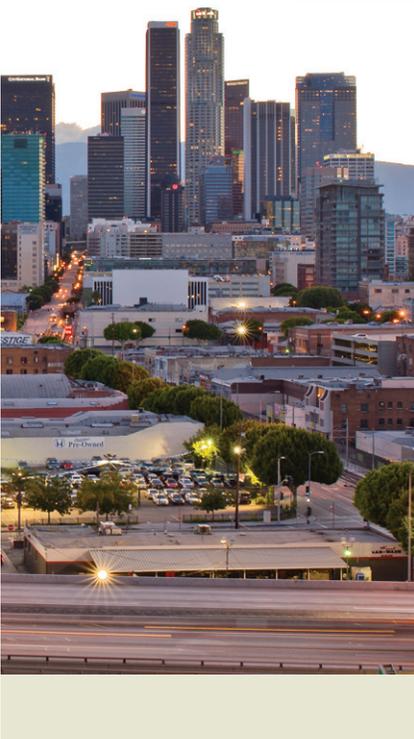
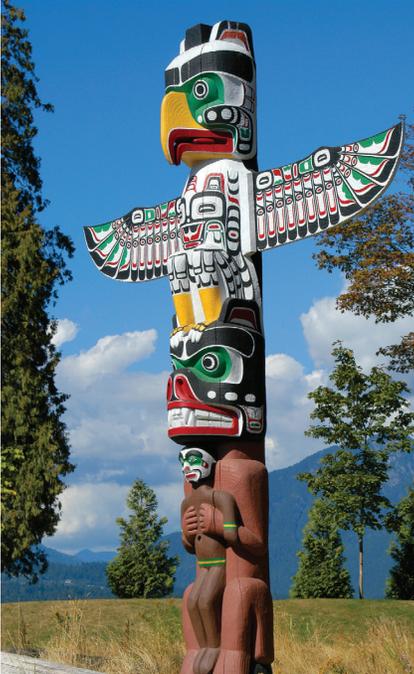


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Table of Contents

EXECUTIVE SUMMARY	1
INTRODUCTION	6
SECTION ONE ■ ECONOMIC OVERVIEW AND OUTLOOK	10
SECTION TWO ■ BY THE NUMBERS	17
SECTION THREE ■ TRADE TIES	20
U.S. - Canada Trade	20
California - Canada Trade	21
Los Angeles Customs District (LACD) - Canada Trade	23
Los Angeles International Airport (LAX) Trade with Canada	25
Los Angeles Metropolitan Area Exports to Canada	26
SECTION FOUR ■ INVESTMENT TIES	30
Foreign Direct Investment (FDI)	30
Canadian Investment into Los Angeles County	31
L.A. County FDI – Green/Clean Tech Strategy	32
SECTION FIVE ■ BUSINESS TIES	36
L.A. County Fortune 500 Companies Present in Canada	36
L.A. County Companies Present in Canada	38
Other L.A. County Firms Present in Canada	41
Key Canadian Companies Present in L.A. County	41
SECTION SIX ■ OPPORTUNITIES AND RESOURCES	44
Opportunities for Trade and Investment	44
Los Angeles County Trade and Investment Organizations	48
Canadian Trade and Investment Organizations in L.A. County	49
SECTION SEVEN ■ OTHER TIES	51
SECTION EIGHT ■ WHAT LIES AHEAD	55
Key Challenges Ahead	56
Key Opportunities Ahead	56
SECTION NINE ■ CONCLUSION	58
SOURCES	60



Executive Summary

Los Angeles County and Canada are two places that have grown, and continue to grow closer together, by building a mutually beneficial relationship over the past 150-200 years. The peoples of Canada and Los Angeles County have developed a strong partnership due to this long shared history. Canada's impact on Los Angeles County can be mostly felt economically. Indeed, Canadian-Los Angeles County trade, investment, and business ties have long benefitted both economies, and to an increased extent since the early 1990s due to the 1989 and 1994 free trade agreements. The futures of Los Angeles County and Canada will be tied together as both economies and societies share many linkages and traits in common. The connections forged in the past and new possibilities that will open up in the future are highlighted in this special report.

Overview of Report

The objective of this report is to highlight the deep and growing bonds between Canada and Los Angeles County and how they have impacted the development of both places. This report provides an overview of the breadth and depth of the ties between Canada and Los Angeles County beginning with a focus on the Canadian and U.S./California/ Los Angeles County economies. Second, the analysis provides a comparison between the two with a by-the-numbers section. Third, the analysis presents the economic links between the two with a focus on the trade links, the Foreign Direct Investment (FDI) links, and the business links. Next, the report focuses on prospects for the future. Then, the analysis describes other ties or personal connections between Canada and Los Angeles County including the educational, cultural, and network ties. In the final sections of the report, we describe some of the challenges and opportunities that lie ahead for this partnership and present some recommendations to further solidify the relationship.

Economic Overview and Outlook

The population of Canada is roughly 34 million people with a labor force of 19 million. Canada's GDP is \$1.7 trillion utilizing official market exchange rates making it the 10th largest economy in the world. By comparison, if California were included in the rankings it would have the 9th largest economy in the world with a GDP of \$1.9 trillion. Based on official market exchange rates, Canada has a GDP per capita of \$50,000, compared to \$48,000 for the U.S. and \$51,000 for California. Close to 90% of Canada's GDP is derived from four provinces including Ontario (40%), Quebec (20%), Alberta (15%), and British Columbia (12%). Trade plays a vital role in the



Canadian economy with exports accounting for 30-35% of GDP. The Canadian economy is very closely integrated with the U.S. economy, with U.S. trade accounting for 75%-80% of all Canadian trade activity.

The key sectors of the Canadian economy include services, energy and mining, and manufacturing. Similar to other advanced economies, Canada's economy is dominated by services, which accounts for more than 70% of GDP. The key service industries include retail, business services, education, healthcare, and entertainment. However, Canada is also rich in natural resources, which play a significant role in the economy. In fact, Canada is the U.S.'s largest supplier of energy.

Manufacturing has a substantial presence in the Canadian economy. The sector is heavily dominated by auto and auto part manufacturing that is primarily located in Central Canada (mainly Ontario). Other key manufacturing sectors include aerospace, medical devices, machinery, and equipment. These are all very similar to L.A. County's manufacturing base. Exports (both natural resources and manufactured goods) play a key role as they comprise roughly 30-35% of GDP, compared to roughly 13% of GDP for the U.S. Since the implementation of the Canada-U.S. Free Trade Agreement (FTA) in 1989 and the North American Free Trade Agreement (NAFTA) in 1994, Canada and the U.S. have become very close trade partners.

The main economic driver of Canada is Ontario, which represents roughly 40% of Canada's population and total economic output. An increasing number of multinational firms have chosen Ontario for new investments. In fact, based on the most recent data from 2010 of all the states and provinces in North America, the province of Ontario attracted the second highest number of FDI projects just behind California.

The province of Quebec withstood the global economic crisis better than the rest of Canada and better than the U.S. Quebec's economy is the most diversified economy in Canada. The province of Quebec is divided into 17 administrative regions. Some of these regions are global leaders in mining (ranks

third in the world for its mineral potential), precious metals, aerospace, marine biotechnology, aluminum production, video games, and life sciences. The economy is mainly driven by its educated workforce as over 75% of workers in Quebec have at least secondary school education and almost 20% hold a university degree.

Canada's GDP grew at an annualized rate of 1.9% in the first quarter and 1.8% in the second quarter of this year. Growth is expected to be roughly 2.0% this year and 2.5% in 2013. This continued moderate growth should lead to an increase in trade and investment over the short term. Those areas that are less dependent on natural resources will experience lower rates of growth over the short term. With its rich natural resource base, Alberta will continue to lead the way with Ontario expected to perform at the national average.

The Los Angeles County economy is estimated to be \$558 billion, which would be about a third the size of the Canadian economy, and similar in size to the province of Ontario. The L.A. County economy is the largest economy of any county in the U.S. and would be the 21st largest economy in the world based on 2011 estimated figures. Los Angeles County has the most diversified county economy in the U.S.

Los Angeles County lagged in recovery from the Great Recession over the past two years, but it finally gathered momentum in 2012. While the county economy has embarked on its journey to recovery, the pace will be slow. Nonfarm job gains of less than one percent in 2011 and 2012 will be followed by a 1.2% gain in 2013. It will take several years to return to the job levels that preceded the recession, but most industries are expected to add jobs this year and next, the exceptions being government and manufacturing. The unemployment rate should improve to 11.5% this year and 10.8% in 2013. As the labor market heals, taxable sales will respond with modest single digit percentage gains this year and next.

Trade Ties

Two-way trade between California and Canada totaled \$37.8 billion in 2011, made up of \$20.5 billion in imports from Canada and \$17.3 billion in exports to Canada. This is a significant increase from the late 1980s and early 1990s. Two-way trade between California and Canada has nearly quadrupled since 1988 when the FTA was signed. Nearly 1.2 million jobs in California depend on Canada-U.S. trade and investment. This represents roughly 9% of all nonfarm jobs in



Trade Ties (continued)

California. There are over 300 Canadian owned companies in California that employ over 34,000 people. Canada is California's second largest export market behind Mexico and California's second largest source of foreign tourism after Mexico. Also, Canada supplies roughly 25% of California's natural gas and is a critical supplier of electricity during the summer.

It is important to note that two-way trade figures between the ports within the Los Angeles Customs District (LACD) and Canada are grossly understated. Trade data from the U.S. Census Bureau are classified by customs district rather than the actual source of production and/or final destination. Therefore, overland shipments are under-reported for customs districts not bordering the country in question. Also, since much of Southern California's trade with Canada utilizes ground transportation like trains and trucks most of that traffic is captured by inland border ports in customs districts like Seattle, Washington and Detroit, Michigan.

Two-way trade between the Los Angeles Metro Area and Canada has a strong impact on the respective economies, with an estimated 250,000 Los Angeles County jobs that are supported by trade with Canada. Based on recent data from the Brookings Institution, Canada is the Los Angeles Metro area's top export market. The Brookings data includes both goods and services and it is estimated by production location and not based on the origin of movement data that the U.S. Census Bureau produces. In addition, Canadian tourists to Los Angeles make a significant contribution to the local economy. Canadian visitation has grown by nearly 77% since 2001, reaching a record high of 675,000 visitors last year. Canada is the second largest source of visitors to Los Angeles. Also, the direct spending of those visitors was estimated to be \$353 million.

Investment Ties

Canada is one of the largest investors in California based on data from the U.S. Department of Commerce's Bureau of Economic Analysis (BEA). There are over 300 Canadian-owned companies in California that employ more than 34,000 people. Circle K Stores and Stantec Consulting Inc. are two of the largest Canadian-owned employers in California.

Canada is the fifth largest source of foreign-owned and -affiliated businesses in Los Angeles County, based on preliminary analysis of 2012 business data by the LAEDC.

Out of a total of 347 establishments, the largest industry area for Canadian-owned companies is retail trade with 55 total establishments. This is followed by finance and insurance (37 total establishments) and professional, scientific, and technical services (36 total establishments) and wholesale trade (36 total establishments).

Major Canadian names operating in Los Angeles County include Circle K Stores, John Hancock Life Insurance, IMAX Entertainment, Lionsgate Entertainment, Bombardier, Thomson Reuters, Cirque du Soleil, The Stronach Group (Magna Entertainment), Aldo Shoes, RBC Wealth Management, and Air Canada.

Retaining that investment and attracting more direct investment from Canada is critical going forward. Canadian companies have always seen Los Angeles as an attractive place to invest for many reasons. First, Los Angeles is a large market, with a population of roughly 10 million people and at least 200,000 business establishments. Next, it has an excellent transportation network, with the two ports, an international airport, a well-developed network freeway system, and railroad linkages to the rest of the U.S. It also has a world-class system of higher education with three superb research universities (Caltech, USC, and UCLA).

Based on LAEDC research, Canadian investments in the future will be made in green/clean technology industries, including the renewable energy sector. Entertainment, digital media, aerospace, life sciences, and water treatment also will be likely investment areas. Other key industries likely to attract investment range from financial services, to biopharmaceuticals, to machinery and equipment, to business services to chemicals.

The County of Los Angeles is aggressively pursuing foreign investment from Canada. The World Trade Center Association Los Angeles-Long Beach (WTCA - a subsidiary of the Los Angeles County Economic Development Corporation) strategy targets Canadian investment in the clean technology and alternative/renewable energy industry amongst others.

Two-way trade between the Los Angeles Metro Area and Canada has a strong impact on the respective economies, with an estimated 250,000 Los Angeles County jobs that are supported by trade with Canada.



Business Ties

This section of the report presents two annotated lists of companies involved in foreign direct investment activities in Canada and Los Angeles County. The first consists of companies based in Los Angeles County (Fortune 500 companies, Key Industry Cluster Firms and Others) and having a physical presence—an office, factory, store, etc.—in Canada. This list is surprisingly diverse and includes nine L.A. County-based Fortune 500 companies. The list includes companies from key industry clusters including professional and business services, hospitality and tourism, fashion design & production, entertainment, technology, and biomedicine.

The second list includes the key Canadian firms with a presence in Los Angeles County. There are a number of well-known Canadian companies and not so well known smaller- to medium-sized Canadian companies in Los Angeles County at present—the number is expected to grow in the future—including Circle K Stores, John Hancock Life Insurance, IMAX Entertainment, Lionsgate Entertainment, Bombardier, Thomson Reuters, Cirque du Soleil, The Stronach Group (Magna Entertainment), Aldo Shoes, RBC Wealth Management, and Air Canada, etc.

Opportunities and Resources

The Canadian and Los Angeles County economies are extremely diversified. Both economies are heavily focused on trade and investment in the key industries of the future and many linkages already do exist between the two economies. This section of the report also includes a list of trade and investment resources in Los Angeles County for the benefit of Canadian investors along with a parallel listing of Canadian trade and economic development organizations that have offices in Los Angeles County, including the Consulate General of Canada in Los Angeles, the Quebec Government Office in Los Angeles, and the Ontario International Marketing Center in Los Angeles.

Other Ties

More than 1,000 Canadian students are currently attending postsecondary institutions of learning in Los Angeles County, including The University of Southern California (USC), the University of California, Los Angeles (UCLA), and Caltech along with other Los Angeles County colleges and universities. When they become alumni and develop successful business, professional and government careers, these students will become important new links between the two regions.



Canada and Los Angeles County are tied together in other ways beside education. The personal connections between the two regions include cultural and network ties. Los Angeles County has some useful business and professional associations for Canadians such as the Canada California Business Council, the Canadian-American Bar Association, and the McGill Alumni Association of Southern California. These resources go a long way in strengthening the relationship between Los Angeles County and Canada. All of these networks will continue to provide the leadership needed in order for the partnership to thrive in the future.

What Lies Ahead

What factors will influence the future relationship between Canada and Los Angeles County? The outlook for international trade calls for increased volumes between Los Angeles County and Canada as the two economies become more integrated. The Canadian government will continue to pursue policies to expand its export markets by passing new free trade agreements. As a result, trade patterns should improve in the short and long term. The greatest opportunities in Los Angeles County-Canada trade will be the growth potential for Los Angeles Metropolitan Area exports to Canada (already the top export market for L.A. Metro Area exports) as a result of continued economic growth in Canada and as a direct result of the benefits of NAFTA. Overall two-way trade will increase between Los Angeles County and Canada.



What Lies Ahead (continued)

On the services side, the potential for Los Angeles County exports will continue to grow particularly in the areas of entertainment and tourism.

The outlook for foreign direct investment from Canada into Los Angeles County is bright. Canadian companies have been and will continue to be especially attracted to

The outlook for foreign direct investment from Canada into Los Angeles County is bright. Canadian companies have been and will continue to be especially attracted to the Los Angeles region.

Los Angeles. Los Angeles County offers Canadian companies a huge market, a well-educated and trained workforce, outstanding trade infrastructure, excellent access to national and international markets, world leading creative industries, a technology rich area, first-rate apparel, auto and engineering design, the nation's largest manufacturing base, competitive costs and great weather.

The greatest opportunities for Canadian investment are in the "green"/clean tech industries, renewable energy, entertainment, digital media, aerospace, and medical devices. Near term, investment will most likely occur within solar energy, enter-

tainment, digital media, and aerospace. The investment will be in the form of distribution, sales and service, research & development and manufacturing. Other relevant opportunities are likely to be in banking and financial services, professional and business services, construction and engineering, creative design, biotech, and machinery and equipment.

Conclusion

This report demonstrates that Canada and Los Angeles County have a special relationship based on economic and business ties as well as personal ties. The economies of Canada and Los Angeles County continue to have significant growth potential. Both locations possess the resources and tools necessary to reap the benefits of increased globalization. Canada and Los Angeles County will continue to play vital roles in the California economy and for that matter in the U.S. and global economy. The world will continue to look to Canada for leadership on many issues from free trade to fiscal responsibility to energy security, while the U.S. and California economies will continue to look to Los Angeles County to lead the way as the "Next Economy" begins to evolve (one focused on hi-tech manufacturing, exports, and the green industries).



Introduction

Overview of Report¹

The objective of this report is to highlight the deep and growing bonds between Canada and Los Angeles County and how they have impacted the development of both places. This report provides an overview of the breadth and depth of the ties between Canada and Los Angeles County beginning with a focus on the Canadian and U.S./California/Los Angeles County economies. Second, the analysis provides a comparison between the two with a by-the-numbers section. Third, the analysis presents the economic links between the two with a focus on the trade links. Fourth, the report explains the significance of the role Foreign Direct Investment (“FDI”) plays in the relationship between Canada and Los Angeles. Fifth, the study provides a description of the business and financial links by profiling firms that are based in Los Angeles County and also present in Canada, followed by profiles of the key Canadian firms with a presence in Los Angeles County. Sixth, the report focuses on investment prospects for the future. Then, the analysis describes other ties or personal connections between Canada and Los Angeles County including the educational, cultural, and network ties. In the final sections of the report, we describe some of the challenges and opportunities that lie ahead for this partnership and present some recommendations to further solidify the relationship.

Historical Ties

The historical ties between Canada and California can be traced back to the British fur trade of the early 1800s and the 1804 treaty between the U.S. and Britain. This treaty gave Canadians the opportunity to trade in the U.S. Traders from the North West Company, which was established in Montreal, spread into various parts of the U.S. and eventually the Hudson’s Bay Company made its way to the Western U.S.

Trade agreements over decades including, most notably the Canada-U.S. Free Trade Agreement in 1989 and of course, NAFTA in 1994, transformed the economic relationship between Canada and the U.S./California/Los Angeles County.

¹Please note that the report refers to U.S. Dollars unless otherwise noted and heavily focuses on the Provinces of Ontario and Quebec due to the overall economic significance of these two regions.



Map of Canada





Map of Los Angeles County





Key Cities and Provinces in Canada:

(Based on Estimated Population, minimum of 400,000)

Canada	34 million
Toronto (Ontario)	2.6 million
Toronto Metro Area	5.8 million
Montreal (Quebec)	1.65 million
Montreal Metro Area	3.9 million
Vancouver (British Columbia)	603,000
Vancouver Metro Area	2.4 million
Calgary (Alberta)	990,000
Calgary Metro Area	1.1 million
Edmonton (Alberta)	860,000
Ottawa (Ontario) (Capital of Canada)	860,000
Quebec City (Quebec)	859,000
Hamilton (Ontario)	650,000
Winnipeg (Manitoba)	640,000
Kitchener (Ontario)	420,000

Key Cities in Los Angeles County:

(Based on Estimated Population, minimum of 100,000)

Los Angeles County	10 million
City of Los Angeles	4.1 million
Long Beach	490,000
Glendale	210,000
Santa Clarita	180,000
Pomona	160,000
Pasadena	150,000
Torrance	150,000
Palmdale	150,000
Lancaster	145,000
West Covina	115,000
Burbank	110,000
Norwalk	110,000
Carson	110,000
South Gate	100,000



SECTION ONE

Economic Overview and Outlook

Overview of the Canadian Economy

The population of Canada is roughly 34 million people with a labor force of 19 million. Canada's GDP is \$1.7 trillion utilizing official market exchange rates making it the 10th largest economy in the world. By comparison, if California were included in the rankings it would have the 9th largest economy in the world with a GDP of \$1.9 trillion. Canada's GDP is \$1.4 trillion in purchasing power parity terms (PPP), which would then make it the world's 15th largest economy. Based on official market exchange rates, Canada has a GDP per capita of \$50,000, compared to \$48,000 for the U.S. and \$51,000 for California. Canada is part of the G8 and a member of the Organization for Economic Co-operation and Development (OECD).

Close to 90% of Canada's GDP is derived from four provinces including Ontario (40%), Quebec (20%), Alberta (15%), and British Columbia (12%). Trade plays a vital role in the Canadian economy with exports accounting for 30-35% of GDP. Roughly 60% of Canadian exports come from the energy, forestry, and mining sectors while the rest comes from machinery, equipment, and autos and auto parts. The Canadian economy is very closely integrated with the U.S. economy, with U.S. trade accounting for 75%-80% of all Canadian trade activity.

The key sectors of the economy include services, energy and mining, and manufacturing. Similar to other advanced economies, Canada's economy is dominated by services, which accounts for more than 70% of GDP. The key service industries include retail, business services, education, healthcare, and entertainment. However, Canada is also rich in natural resources, which play a significant role in the economy. Oil, natural gas, coal, copper, iron ore and gold are the principal natural resources of Canada. Canada is currently ranked third in the world in oil reserves behind Venezuela and Saudi Arabia. In fact, Canada is the U.S.'s largest supplier of energy. Moreover, higher oil prices have made the Alberta oil sands economically viable. Thus, Canada will continue to play a significant role as an exporter of energy.

Manufacturing has a substantial presence in the Canadian economy. The sector is heavily dominated by auto and auto part manufacturing that is primarily located in Central Canada (mainly Ontario). Other key manufacturing sectors include aerospace, medical devices, machinery, and equipment. These are all very similar to L.A. County's manufacturing base.



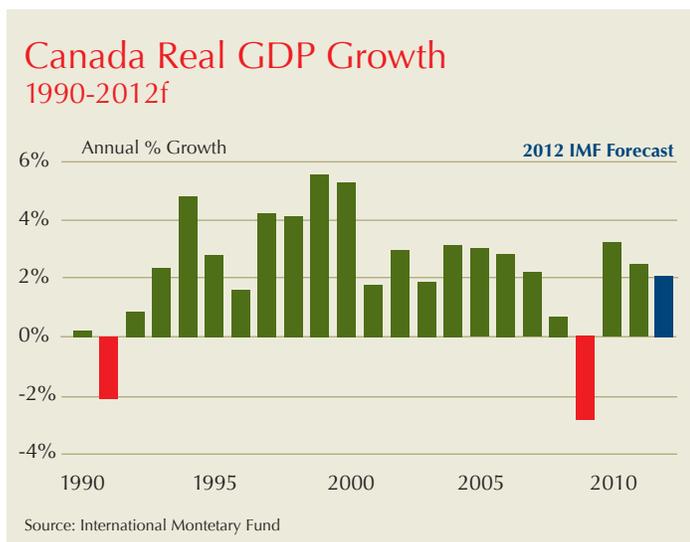
Overview of the Canadian Economy

(continued)

Exports (both natural resources and manufactured goods) play a key role as they comprise roughly 30-35% of GDP, compared to roughly 13% of GDP for the U.S. Since the implementation of the Canada-U.S. Free Trade Agreement (FTA) in 1989 and the North American Free Trade Agreement (NAFTA) in 1994, Canada and the U.S. have become very close trade partners.

Canadian real GDP growth was roughly 3% annually from 1992 to 2008, but suffered a 2.5% decline during the Great Recession of 2009. Canada experienced growth rates of 3.1% in 2010 and 2.2% in 2011. The economic forecast for 2012 and 2013 calls for growth in the 2% range, with economic growth expected to average 2.3% annually over the next five years. Both the U.S. and Canadian economies continue to face not only external risks but domestic weakness as demonstrated by the recent quarterly results. However, the Canadian economy is definitely more influenced by the external environment than the U.S. economy due to the greater reliance on exports and commodity prices.

Overall, Canada weathered the global economic crisis better than other advanced economies due to a timely fiscal stimulus (that it could afford due to its fiscal situation), low interest rates, a strong banking sector (due to regulations and conservative lending practices), and revenues from natural resources (as they play a more significant role relative to other advanced economies).



Province of Ontario

Close to 90% of Canada's economic output is derived from four provinces. The main economic driver of Canada is Ontario, which represents roughly 40% of Canada's population and total economic output. An increasing number of multinational firms have chosen Ontario for new investments. In fact, based on the most recent data from 2010 of all the states and provinces in North America, the province of Ontario attracted the second highest number of FDI projects just behind California. Also, according to Forbes, Site Selection, and PriceWaterhouseCoopers (PWC), Ontario has become a top destination for FDI in North America. One reason for this has been the economic performance of Canada, which has witnessed the highest annual growth rates among the G7 economies over the past decade. The recent economic success has mainly been a result of exports (both commodities and merchandise exports). Other critical factors have been the overall attractiveness of the Canadian banking sector and the favorable corporate income tax structure. The combined federal-provincial corporate income tax rate is lower than the average of G8 and G20 countries and lower than the rate in the U.S., which is one reason why the Economist Intelligence Unit (EIU) concluded Canada will be the best place in the G7 to do business until at least 2014.

Recent accolades for Ontario:

- **Forbes.com** – Ranked Ontario as one of the top destinations for FDI in North America and the Province received top rankings for job creation, tax reform, and healthcare
- **PWC 2011 "Cities of Opportunity"** survey ranked Toronto out of 26 global cities in the top 5 in key categories including: intellectual capital and innovation, health, safety and security, demographics, lifestyle assets, ease of doing business, sustainability, and cost
- **Site Selection magazine ranked Ontario** as the most competitive province in Canada and four cities were ranked among the leading metro areas in corporate facility development including Toronto, Hamilton, Windsor, and London



Greater Toronto

The key industry sectors in Greater Toronto are financial services, information technology, digital media, film and television, life sciences, and clean energy, all of which offer excellent opportunities for investors. The financial services sector employs 385,000 people. Canada's five largest banks (Royal Bank of Canada – RBC, Toronto-Dominion Bank – TD Canada, Bank of Nova Scotia – Scotiabank, Bank of Montreal – BMO, and the Canadian Imperial Bank of Commerce – CIBC) are all headquartered in Toronto. In addition, the majority of Canadian insurance companies, securities companies, foreign banks, pension funds, and mutual fund companies are headquartered in Toronto.

The Information Technology (IT) and digital media sectors also have a significant presence in Toronto. Nearly 150,000 people work in this area with 70% concentrated in the development and service sectors. The creative industries also have a large presence in Toronto as they employ over 100,000 people. In fact, similar to Los Angeles County, Toronto employs many people in film and television production. Toronto actually ranks third in North America in film and television production with a labor force of 32,000 people. Spending on the film and television industry in Toronto witnessed an increase of 25 percent in 2011, reaching C\$1.1 billion.

Also, Toronto is home to North America's largest life science sector with 1,200 companies employing 140,000 people in medical devices and surgical supply, pharmaceuticals, biotech, and medical assistive technologies. Finally, clean energy and environmental services have a substantial presence in Toronto. Nearly 40,000 people are employed by over 1,700 firms in areas such as wind and solar energy. Toronto also has environmental engineering and services firms along with SmartGrid solution providers.

PROFILE Pinewood Studios



- A modern, purpose-built complex for film and television production, fast becoming a destination facility for international producers coming to Toronto
- Situated on an 11-acre site, a short drive from downtown Toronto
- More than 250,000 sq. ft. of production space
- Eight stages, including North America's largest purpose-built soundstage
- Localized support facilities and office space – able to accommodate productions of any scale
- Home of the Screen Industries Research and Training Center (Centre) – an international center (centre) for High Frame Rate research

PROFILE MaRS



The key goal of MaRS is to strengthen Canada's global innovation brand by helping to build great companies that will develop a vibrant innovation hub. The MaRS center is located in Toronto and it is adjacent to Canada's leading teaching hospitals and three major universities. The center focuses on advanced materials and engineering, information and communication technology, life sciences and health care, clean tech, and social innovation.

The clean tech practice focuses on renewable energy, energy efficiencies, clean water, sustainable solution technologies, smart grid, and low-carbon energy infrastructure. The IT, communications, and entertainment practice focuses on communications hardware and software, wireless technologies, IT solutions, digital media, online businesses, health care IT, and digital entertainment. The life sciences and health care practice focuses on therapeutics, medical devices, health care IT, and diagnostics.

The center develops partnerships across the globe, helps to identify financing opportunities, and creates market clusters.

PROFILE Water Institute, University of Waterloo



- Recognizing the collective excellence of Waterloo water research programs, the Water Institute was officially formed in 2009 to assist in coordinating the extensive group of university researchers, staff, students, and partners working in water science, technology, and policy, and bring them together within a single institutional setting.
- Has emerged as an internationally recognized research institution specializing in aquatic ecology and toxicology, atmospheric and hydrological sciences, water and wastewater treatment and water policy, management and governance. More than 100 faculty members from all six faculties and close to 20 departments are engaged in these key areas providing innovative expertise in research, education, and technology development.
- Waterloo researchers work to change the future of water science, technology, and policy. Interdisciplinary teams from across the university examine different aspects of water issues ranging from climate change to water scarcity.



Province of Quebec

The province of Quebec withstood the global economic crisis better than the rest of Canada and better than the U.S. Quebec's economy is the most diversified economy in Canada. The province is broken into 17 administrative regions. Some of these regions are global leaders in mining (ranks third in the world for its mineral potential), precious metals, marine biotechnology, aluminum production, video games, and life sciences. The economy is mainly driven by its educated workforce as over 75% of workers in Quebec have at least secondary school education and almost 20% hold a university degree. Nearly 50% of Quebec's population speaks two languages or more. In addition, the province of Quebec welcomes over 40,000 immigrants annually creating a very diverse population.

The overall economy is heavily focused on high-tech industries including life sciences, aerospace, environmental technologies, photonics, and multimedia. The province allocates a higher percentage of GDP to R&D than the average rate in OECD countries, the G7 nations, and the European Union. In addition, corporate R&D spending receives the most favorable tax treatment of all provinces in Canada and of all the G7 nations. Quebec has one of the most competitive tax systems for investment in the developed world. Ranking first in Canada in terms of money invested in venture capital, Quebec is very interconnected with the global economy, particularly the U.S. market. Quebec has five international ports including the Port of Montreal, the Port of Quebec, the Port of Sept-Îles, the Port of Trois-Rivières, and the Port of Saguenay.

Greater Montreal

The key economic sectors in Montreal are information technology, digital media, aerospace, and life sciences. All of these areas offer attractive opportunities for investors. The Montreal IT industry cluster dominates the metropolitan area economy. The IT and digital media industry cluster is referred to as information and communications technologies (ICT). This particular sector has experienced robust growth over the past decade, propelled by multimedia, software development, and the implementation of ICT services in other sectors including financial services and healthcare. The IT and digital media cluster encompasses 5,000 companies that employ 120,000 people in the greater Montreal area. The leading firms include IBM, Warner Bros. Interactive Entertainment, Electronic Arts,

SAP, Fujitsu, Autodesk, Bell Canada, CGI, Dassault Systems, DMR, Sanmina SCI, Telus, SR Telecom, Positron, Rogers, Videotron, Eidos, GFI, and Compuware.

The aerospace sector has a significant presence in the greater metropolitan Montreal area with over 200 firms that employ over 40,000 people. The aerospace sector is comprised of world-class manufacturers, OEM's, subcontractors and suppliers, research centers, and educational institutions that train a highly skilled workforce. In fact, the greater Montreal area is home to the headquarters of international organizations including the International Air Transport Association (IATA), the International Business Aviation Council (IBAC), and the International Civil Aviation Organization (ICAO). Roughly 98% of Quebec's aerospace industry is based in the greater Montreal area. The greater Montreal area is considered to be one of the world's leading aerospace centers along with Seattle (Boeing) and Toulouse, France (Airbus). In fact, the area has the second largest density of aerospace employment in the world. One in two-hundred workers in Quebec are employed in aerospace and one in 95 in Montreal works in a job related to aerospace. The second annual Global Supply Chain Summit which is organized by Aero Montreal is in Montreal in 2012.

Montreal is home to a substantial life science sector with over 600 companies employing over 40,000 people in pharmaceuticals, biotech, and medical technology. Montreal has the largest concentration of pharmaceutical companies in Canada. The 10 largest global pharmaceutical firms are all in Montreal including Abbott Laboratories, AstraZeneca, Bayer, GlaxoSmithKline, Johnson&Johnson, Merck, Novartis, Pfizer, Roche, and Sanofi. Other leading firms that are present in Montreal include Wyeth, Sandoz, MDS, Anapharm, Charles River, Algorithme, and BMS. In addition, Montreal has Biotech City, Technopole Montreal, and the McGill University Research Center.

Outlook for the Canadian Economy

Canada's GDP grew at an annualized rate of 1.9% in the first quarter of this year. Growth is expected to be roughly 2.0% this year and 2.5% in 2013. This continued moderate growth should lead to an increase in trade and investment over the short term. Those areas that are less dependent on natural resources will experience lower rates of growth over the short



term. Alberta will continue to lead the way with Ontario expected to perform at the national average.

There are wild cards or risks that could have a very significant impact on economic growth in Canada. The first risk involves the impact of the sovereign debt crisis in Europe on the U.S. and global economies. This would have a greater impact on areas like Ontario, which are more closely linked to the U.S. economy. In addition, any substantial decline in commodity prices as a result of a severe global slowdown or recession would have a large impact on Alberta and all of Western Canada. On the other hand, a positive wild card or risk would be an escalation in oil prices, which would have a very positive effect on the Canadian economy as witnessed in 2008.

U.S. Economy: Current Conditions

The U.S. economy is the largest economy in the world with a GDP of roughly \$15 trillion. The U.S. economy grew by 1.7% in 2011, with the consumer sector accounting for 70% of all expenditures. Increases in consumer spending are needed to spur economic growth, causing firms to ramp up the production of goods and services, and triggering both job and income growth. Business investment spending accounted for 13% of total economic activity in 2011. It includes expenditures on nonresidential structures, equipment and software, additions to inventory, and residential investment, that is, new single-family and multi-family home construction.

Government spending at the federal, state, and local levels accounted for 20% of total economic activity in 2011, with the federal government accounting for roughly 40% of all government expenditures and state and local government accounting for the other 60%. Spending at all levels of government continues to be under pressure as a result of the weak recovery in the overall economy.

Outlook for the U.S. Economy

Although the recession officially ended three years ago, the economy has been stuck in a low growth trajectory with GDP increasing at approximately 2%, due largely to below par demand for goods and services, primarily on the part of the consumer sector. Slow growth leaves slack in resource markets and results in a subdued threat of inflation, but it also means that it may take years before the labor market fully recovers and the unemployment rate returns to a normal level.

Following a growth rate of 1.7% last year, GDP is expected to grow by 2.0% this year and 2.3% in 2013. The unemployment rate will improve slowly from 9.0% in 2011 to 8.2% this year and 7.9% in 2013, caused by 1.4% annual gains in nonfarm jobs. Inflation, which was 2.3% in 2011, will remain in check at 2.2% this year and 1.9% in 2013.

The economy continues to face risks abroad, given the ongoing global slowdown. China and other emerging economies continue to grow, but at less robust rates than in recent years, while some countries in Europe have already tipped into recessions of varying degrees of severity. The result is muted demand for U.S. exports, tempering GDP growth.

California Economy: Current Conditions

The California economy seemed to be going sideways in the first half of 2012, at least based on the unemployment rate, which was virtually unchanged in the first five months of the year. However, the state is gradually recovering from the Great Recession. The statewide unemployment rate peaked at 12.4% in 2010, but fell by just over one percentage point from 11.9% in May 2011 to 10.8% this past May. Moreover, the state has added 97,400 nonfarm jobs since the start of the year, nearly a quarter of the 421,500 jobs the state has recouped since January 2010.

While there have been sharp fluctuations in the month-to-month job numbers, the state has added jobs for 10 months in a row since August 2011, and is on track for a second year of net job gains, following three years of recession job loss totaling 1.3 million jobs. California's job market has experienced average year-to-year job gains of 1.3% so far this year, compared with a 1.0% gain last year. Regionally, the largest gains have occurred in the Silicon Valley and Bay Area along with Orange County, while other areas of the state such as Los Angeles County, the Inland Empire, Sacramento, and other parts of the Central Valley have marked slower progress. The performance of industries across the state has been uneven, but most of the major industries saw job gains in the first seven months of the year. In percentage terms, the largest gains occurred in the professional, scientific and technical services sector, education services, information, administrative and support services, and mining and logging, with small to modest gains in many other industry sectors. As expected, the largest job losses occurred in the government sector, with



California Economy: Current Conditions *(continued)*

a marginal decline in durable goods manufacturing. In fact, net of government jobs, private industry jobs increased by an average year-to-year rate of 3.9% in the first half of the year.

Outlook for the California Economy

Even with the headwinds of a global economic slowdown, California's economy should move forward in 2012 and 2013. The unemployment rate will continue to improve, decreasing from 11.7% in 2011 to 10.7% in 2012 and 10.0% in 2013. Nonfarm jobs will grow by 1.5% this year and next, following a weaker 0.9% gain last year. While the labor market is still years away from normal, progress will be made over the next two years with gains in private sector jobs, notably in technology-related industries, professional and business services, and information, with some welcome gains in construction. These gains will be offset by cuts in government jobs, although the losses will be much smaller than those borne over the past four years.

Overview of the Los Angeles County Economy

The Los Angeles County economy is estimated to be \$558 billion, which would be about a third the size of the Canadian economy, and similar in size to the province of Ontario. The L.A. County economy is the largest economy of any county in the U.S. and would be the 21st largest economy in the world based on 2011 estimated figures. Los Angeles County has the most diversified county economy in the entire nation, supported by 14 of the region's largest trade industry clusters and five of the largest population-serving clusters. The industry clusters include Entertainment, Trade, Business Services, Education, Fashion, Hospitality, Financial Services, Processed Food, Aerospace, Analytical Instruments, Publishing & Printing, Metal Manufacturing, Biomedical, and Information Technology. L.A. County also has the busiest and most important customs district in the nation and for that matter in the entire Western Hemisphere. The local ports (including the Port of Los Angeles, the Port

of Long Beach and Los Angeles International Airport), serve as America's main gateway to the global economy and particularly to developing Asia and the Pacific Rim. In 2011, the ports of Los Angeles and Long Beach had two-way trade values of more than \$387 billion and handled more than 14 million containers, or nearly 40% of the imported containerized cargo. It possesses a large consumer market that includes a population larger than 43 of the nation's 50 states. There are roughly 10 million people residing in Los Angeles County, which is about one third the size of the entire Canadian population. All of this economic activity combined makes L.A. County the #1 Creative Capital, #1 Manufacturing Capital and #1 International Trade Capital of America!

Outlook for the Los Angeles County Economy

Los Angeles County lagged in recovery from the Great Recession over the past two years, but it finally gathered momentum in 2012. The monthly unemployment rate fell by two percentage points in less than a year from the cyclical peak of 13.2% in July 2011 to 11.2% in May 2012.

While the county economy has embarked on its journey to recovery, the pace will be slow. Nonfarm job gains of less than one percent in 2011 and 2012 will be followed by a 1.2% increase next year. It will take several years to return to the job levels that preceded the recession, but most industries are expected to add jobs this year and next, the exceptions being government and manufacturing. The unemployment rate should improve to 11.5% this year and 10.8% in 2013. As the labor market heals, taxable sales will respond with modest single digit percentage gains this year and next.

Overall Economic Impact of the U.S.-Canada Relationship

More than eight million U.S. jobs depend on Canada-U.S. trade and investment. Canada is the top export market for 35 states (based on goods only). Total two-way trade (goods and services) between the U.S. and Canada totaled \$689 billion in 2011. Canada is the U.S.'s largest and most secure supplier of energy including oil, natural gas, electricity, and nuclear fuel. There are approximately 400,000 people who cross the U.S.-Canada border daily.



Energy Relationship between Canada and the U.S.

Key Facts

- Canada is the largest foreign supplier of oil, natural gas, uranium, and electricity to the U.S.
- Canada is the third largest producer of natural gas in the world. Since 1973, Canada has supplied 92% of U.S. natural gas imports

Overall Economic Impact of the California-Canada Relationship

Nearly 1.2 million jobs in California depend on Canada-U.S. trade and investment. This represents roughly 9% of all nonfarm jobs in California. There are over 300 Canadian owned companies in California that directly employ over 34,000 people. Total merchandise trade between California and Canada was \$37.7 billion in 2011. Canada is California's second largest export market behind Mexico and California's second largest source of foreign tourism after Mexico. Also, Canada supplies roughly 25% of California's natural gas and is a critical supplier of electricity during the summer.

Overall Economic Impact of the Los Angeles County-Canada Relationship

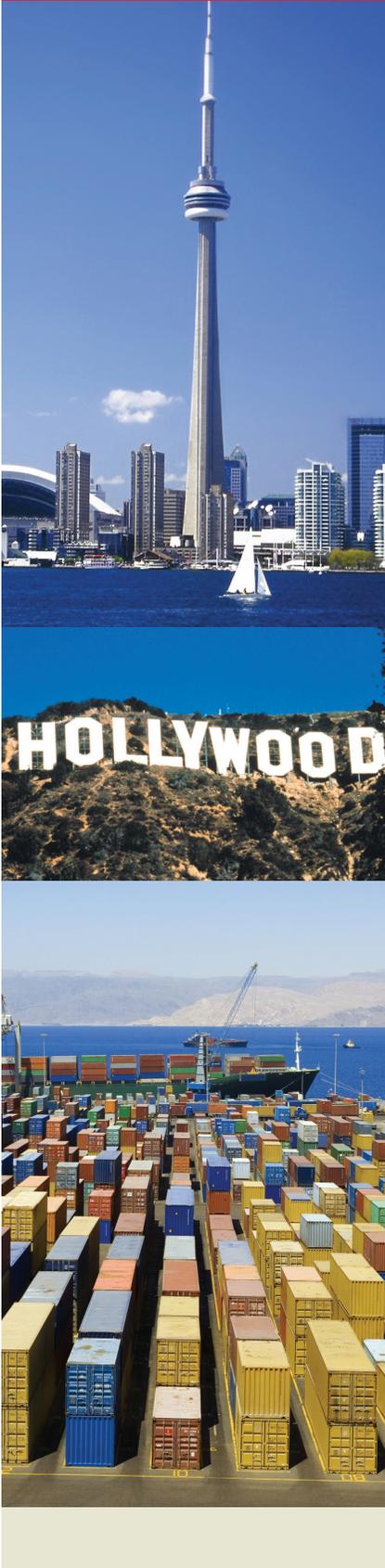
Based on an LAEDC 2008 FDI study, the economic impact of Canadian investment in Los Angeles County was a total of 7,000 direct jobs and 9,800 indirect jobs totaling 16,800 jobs. This translates into \$390 million in wages from those 7,000 direct jobs and \$442 million from those 9,800 indirect jobs totaling \$832 million in wages and salaries related to Canadian investment into Los Angeles County.

Two-way trade between the Los Angeles Metro Area and Canada has a positive impact on the respective economies, with an estimated 250,000 Los Angeles County jobs that are supported by trade with Canada. Based on recent data from the Brookings Institution, Canada is the Los Angeles Metro area's #1 export market. In addition, Canadian tourists to Los Angeles make a significant contribution to the local economy. There were 675,000 visitors from Canada in 2011, making them the second largest source of visitors.

Global Economic Outlook and Key Challenges Ahead

The overall slowdown in the global economy poses an immediate problem for U.S. and Canadian exports, previously a bright spot for both economies over the past few years. Additionally, any further declines in U.S. and Canadian consumer spending will only exacerbate the problem. However, any renewed increases in consumer demand from the U.S. will definitely benefit the Canadian economy as nearly 80% of merchandise exports are to the U.S. The Los Angeles County and Canadian economies should benefit in the medium to long term as key growth industries gain a solid foothold in the Los Angeles area and in Canada such as green/ clean technology, renewable energy, IT and digital media, and life sciences.

Both Los Angeles County and Canada should continue to reap the benefits of increasing globalization and the North America Free Trade Agreement (NAFTA). As America's entertainment, manufacturing, and trade capital, with a large consumer market, a well-trained workforce, the nation's busiest port complex, an excellent higher education base and a technology-rich economic base, Los Angeles County should continue to solidify its overall ties with Canada in the years ahead. Los Angeles County will continue to provide Canadian firms with lucrative investment options.



SECTION TWO By the Numbers

Canada-California by the Numbers

	Canada	California
Population (millions)	34	38
GDP (trillions)	1.7	1.9
Labor Force	18,850,00	18,385,00
Exports as % of GDP	30-35%	11%
Key Industries	<ul style="list-style-type: none"> ■ Natural Resources ■ Manufacturing ■ Technology 	<ul style="list-style-type: none"> ■ Technology ■ Agriculture ■ Trade ■ Tourism
Top 3 Major Cities	<ul style="list-style-type: none"> ■ Toronto ■ Montreal ■ Vancouver 	<ul style="list-style-type: none"> ■ Los Angeles ■ San Diego ■ San Jose

Canada-Los Angeles County by the Numbers

	Canada	Los Angeles County
Population (millions)	34	10
GDP	1.7 trillion	557.5 billion
Labor Force	18,850,00	4,924,000
Exports as % of GDP	30-35%	11%
Key Industries	<ul style="list-style-type: none"> ■ Natural Resources ■ Manufacturing ■ Technology 	<ul style="list-style-type: none"> ■ Entertainment ■ International Trade ■ Manufacturing and Tourism
Top 3 Major Cities	<ul style="list-style-type: none"> ■ Toronto ■ Montreal ■ Vancouver 	<ul style="list-style-type: none"> ■ Los Angeles ■ Long Beach ■ Glendale



Ontario Fact Sheet

Population	13.4 million
Capital	Toronto
GDP	C\$638 billion
Labor Force	7.3 million
Unemployment Rate	7.8%
Top 5 Export Markets	<ul style="list-style-type: none"> ■ U.S. ■ UK ■ Norway ■ China ■ Hong Kong
Top 5 Exports	<ul style="list-style-type: none"> ■ Auto & Parts ■ Precious Metal & Stones ■ Mechanical Equipment ■ Electrical Machinery ■ Plastic Products
Top 5 Import Sources	<ul style="list-style-type: none"> ■ U.S. ■ China ■ Mexico ■ Japan ■ Germany
Top 5 Imports	<ul style="list-style-type: none"> ■ Auto & Parts ■ Mechanical Equipment ■ Electrical Machinery ■ Precious Metal & Stones ■ Oils and Other Petroleum Products
Population	Roughly 40% Canada
Capital	Metro area population of 5.8 million

Toronto Fact Sheet

Population	2.6 million
GDP	Over C\$144 billion
Labor Force	1.4 million
Educated Labor Force	Roughly 65% of residents between the ages of 25 and 64 have a post-secondary education, home to 3 universities and 5 colleges
Exports	Over C\$70 billion in goods and services
Financial Capital of Canada	3rd largest financial center in North America
Business Friendly	Has lower business costs than 22 large U.S. cities
Transportation Infrastructure	2nd largest public transit system in North America and the highest per capital ridership rate on the continent
Population	5th largest city in North America
GDP	Representing 11% of Canada's GDP
GDP	Representing 23% of Ontario's GDP



Province of Quebec Fact Sheet

Population	7.9 million
Capital	Quebec City
Economic Engine of Quebec	Montreal Metro Area
GDP	C\$324 billion
Labor Force	3.8 million
Unemployment Rate	8.4%
Population	Roughly 23% of Canada
Largest Province in Canada	
GDP	Representing roughly 20% of Canada's GDP
Highest Level in Canada of R&D Expenditure as a % of GDP	



Montreal (Metro) Fact Sheet

Administrative Divisions	82 Municipalities
Population	3.9 million
GDP	C\$160 billion
Labor Force	1.9 million
Ranked	#1 among Canadian metro areas and #2 in North America for overall economic performance following the Great Recession
Roughly 50% of Quebec's population, GDP, and labor force	



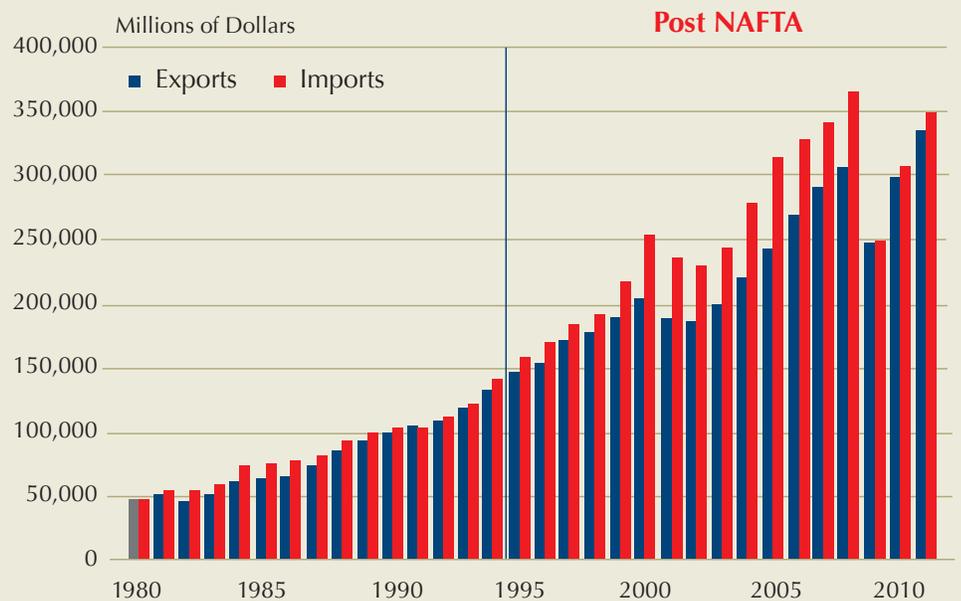
SECTION THREE Trade Ties

U.S.-Canada Trade

The close ties between the U.S. and Canada are reflected in the bi-lateral trading relationship between the two nations, which is the largest in the world in part because of long-standing free trade agreements between the two countries. With \$597.4 billion in total two-way goods trade during 2011, Canada is the U.S.'s largest trading partner. Two-way trade with Canada accounted for over 16% of U.S. total trade. The breakdown consisted of \$316.5 billion in imports from Canada and \$280.9 billion in exports to Canada. This resulted in a U.S. goods trade deficit of approximately \$36 billion in 2011. In 2011, Canada was once again our largest export market. In fact, exports to Canada have increased by nearly 60% since 2000 and are up by 180% since NAFTA went into effect. Exports to Canada comprised nearly 20% of total U.S. exports last year.

The top five U.S. exports to Canada (based on total value) were auto parts and autos, machinery, sound and TV equipment, fuel and oil, and plastics and plastic products. The top two (auto parts and autos and machinery) account for 33% of total exports, while the top four comprise 50% of total exports. Also, Canada is the top export destination for 35 U.S. states.

U.S. and Canada Trade Flows



Source: Bureau of Economic Analysis, 2011p



The top five U.S. imports (based on total value) from Canada were crude oil, autos and auto parts, machinery, plastics and plastic products, and electric machinery. Crude oil represents over 30% of the total. The top four comprise 60% of total imports.

Total two-way trade (including both goods and services) between Canada and the U.S. totaled \$682 billion in 2011. The U.S. had an \$8 billion total trade deficit with Canada in 2011, consisting of a merchandise or goods trade deficit of \$36 billion and a \$28 billion services surplus.

The Canadian economy truly benefitted from NAFTA by gaining greater access to the U.S. market (the largest middle class consumer market in the world). The Province of Ontario was the main beneficiary. Before NAFTA went into effect Canada averaged 1.9% annual growth from 1985 to 1993 and 3.5% for the five years after NAFTA (from 1994 to 1999).

What Goes to Canada?

Top 5 U.S. Exports to Canada

1. Auto Parts and Autos
2. Machinery
3. Sound and TV Equipment
4. Fuel and Oil
5. Plastics & Plastics Products

Top 2 comprise 33% of total exports
Top 4 comprise 50% of total exports

What Comes to the U.S.?

Top 5 U.S. Imports from Canada

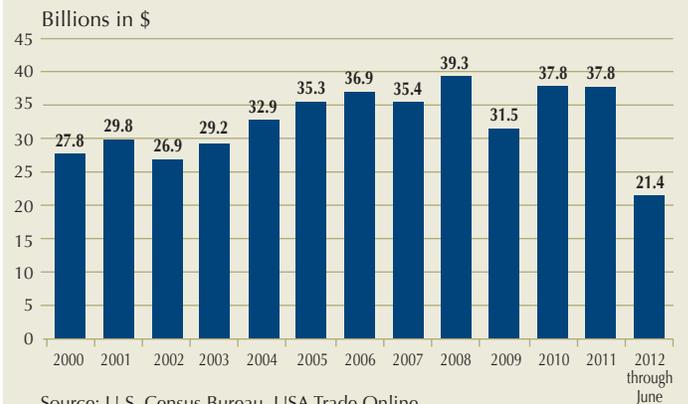
1. Crude Oil (represents over 30% of total)
2. Auto Parts and Autos
3. Computers, Peripherals & Machinery
4. Plastics and Plastic Products
5. Electric Machinery

Top 4 comprise 60% of total imports

California-Canada Trade

Two-way trade between California and Canada totaled \$37.8 billion in 2011, made up of \$20.5 billion in imports from Canada and \$17.3 billion in exports to Canada. This is a significant increase from the late 1980s and early 1990s. Two-way trade between California and Canada has nearly quadrupled since 1988 when the FTA was signed.

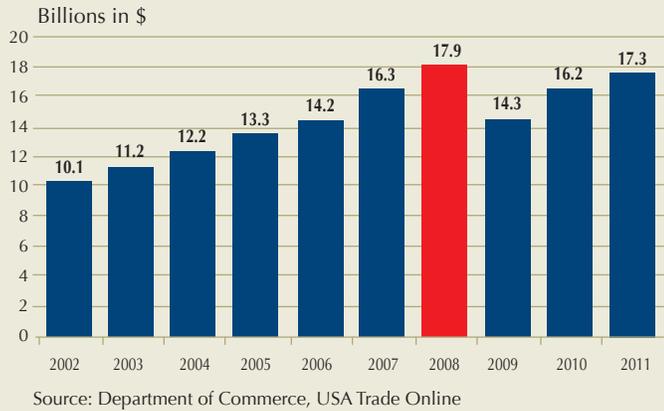
California 2-Way Trade with Canada



The top five California export destinations are Mexico, Canada, China, Japan, and South Korea. In 2008, California exports to Canada reached an all-time record high increasing to \$17.9 billion. One of the key reasons for the record year in 2008 is attributable to the spike in oil prices during the summer of 2008 when crude oil reached nearly \$150 a barrel. In 2011, exports to Canada almost reached pre-crisis levels (\$17.3 billion) after falling to \$14.3 billion in 2009. Last year was a very strong year for California exports to Canada a trend that has continued into 2012. The year-to-date through June figures is \$8.5 billion. The top five exports to Canada were computer and electronic products, agricultural products, transportation equipment, food, and machinery. The top five exports comprise 65% of total exports to Canada.



California Exports to Canada 2002-2011



Imports from Canada totaled \$20.5 billion in 2011. The top five imports from Canada were transportation equipment, chemicals, food, oil and gas, and machinery. The top import (transportation equipment) accounted for 50% of the total imports from Canada in 2011. The top five imports comprise 75% of total imports from Canada.

California Exports – Top 5 Destinations from 2006-2011

Billions in \$

Country	2006	2007	2008	2009	2010	2011
Mexico	19.6	18.3	20.5	17.5	20.9	26.0
Canada	14.2	16.3	17.9	14.3	16.2	17.3
China	9.9	10.6	10.9	9.7	12.5	14.2
Japan	13.9	13.5	13.1	10.9	12.2	13.0
Korea	7.0	7.4	7.7	5.9	8.0	8.4

Source: U.S. Census Bureau, USA Trade Online

California Top 10 Imports from Canada

Commodities	2011 (millions \$)	% of Canada Total
Refined Oil Products	101,846.7	32.3%
Autos and Auto Parts	49,801.1	15.8%
Computer Parts and Machinery	19,913.6	6.3%
Plastics and Plastic Products	10,332.7	3.3%
Electrical Equipment and Electrical Components	8,201.2	2.6%
Diamonds	8,114.9	2.6%
Aluminum and Aluminum Products	7,740.9	2.5%
Paper and Paperboard	7,650.6	2.4%
Iron and Steel	5,769.3	1.8%
Aircraft and Parts	5,351.6	1.7%
Top 10 Total	224,822.7	71.3%

California Top 10 Exports to Canada

Commodities	2011 (millions \$)	% of Canada Total
Electrical Equipment and Electrical Components	3,626.1	28.0%
Computer Parts and Machinery	3,450.7	26.6%
Fruits and Nuts	1,557.0	12.0%
Optical and Medical Instruments	1,057.2	8.2%
Vegetables	871.3	6.7%
Refined Oil Products	834.4	6.4%
Auto and Auto Parts	518.4	4.0%
Wine	416.8	3.2%
Aircraft and Parts	347.8	2.7%
Toys, Games and Sports Equipment	282.3	2.2%
Top 10 Total	12,962.1	71.3%



Trade and Los Angeles County

As the home of the two largest container shipping ports in the U.S., and a major node in the global goods trading network, trade at the San Pedro ports and the region's airports clearly reflects recent trends in the U.S. and across the globe, with steep declines in exports and imports during the recession, and sharp gains as recovery ensued. U.S. goods imports have increased as the U.S. consumer sector has recovered, while U.S. goods exports have climbed in response to changes in the value of the dollar, export initiatives, and a shift of emerging economies to a more balanced mix of investment and consumer spending.

Air cargo shipments grew during the past year, as shipments by air enabled many companies to fine-tune just-in-time inventory management practices to better match near-term changes in the demand for their products, especially when product and selling cycles are short.

The value of two-way trade coming through the Los Angeles Customs District (LACD) was \$386.8 billion in 2011, an increase of 11.5% compared with 2010. Two-way trade through the LACD grew more slowly than for the U.S. as a whole, but still achieved record high levels last year. Imports of \$265.7 billion dominated LACD trade flows, with exports coming in at \$121.1 billion.

The Ports of Los Angeles and Long Beach retained their status as the nation's largest in terms of the number of containers handled. The Port of Los Angeles (POLA) was first with over 7.9 million TEUs (20-foot equivalent units), an increase of 1.4% from 2010. The Port of Long Beach (POLB) was second, handling nearly 6.1 million TEUs, down by 3.2% from a year earlier. The decline in TEUs at POLB was primarily the result of a terminal operator moving to POLA. Combined activity for the two ports declined by 0.7% from 14.1 million units in 2010 to 14.0 million units in 2011.

International airport cargo, which generally consists of small, lightweight, high-value products that require quick delivery, passes through both Los Angeles International Airport (LAX) and Los Angeles/Ontario International Airport. Tonnage passing through LAX fell by 4.4% in 2011 to 1.0 million tons, while cargo moving through Ontario grew by 39.0% in 2011 to 33.2 tons.

International trade is one of the most important economic engines in Los Angeles County and all of Southern California. Based on recently completed research into industry groupings

or "clusters" by the LAEDC, there were 157,200 export-oriented trade jobs in Los Angeles County in 2010. This was down from a peak of 174,400 jobs in 2007, as global trade fell in the wake of the Great Recession. Across the five-county area (Los Angeles, Orange, Ventura, Riverside and San Bernardino), there were 244,110 export-oriented trade jobs in 2010. Los Angeles County had the largest number of jobs, followed in order by Orange County (44,460), the Inland Empire (34,980), and Ventura County (7,490).

Trade Outlook

Expectations are for trade volumes to continue to improve in 2012 and 2013, but the L.A. County seaports still face many challenges ahead including increased competition from East Coast ports (which could become even more problematic after the widening of the Panama Canal is completed in 2014). The outlook for international trade calls for increased trade volumes between California and Canada as both economies becomes further integrated. The greatest opportunities for Los Angeles County-Canada trade will be the growth potential for exports to Canada as a result of continued economic growth in Canada, the linkages between our two economies, and as a direct result of taking full advantage of NAFTA.

Los Angeles Customs District (LACD)-Canada Trade

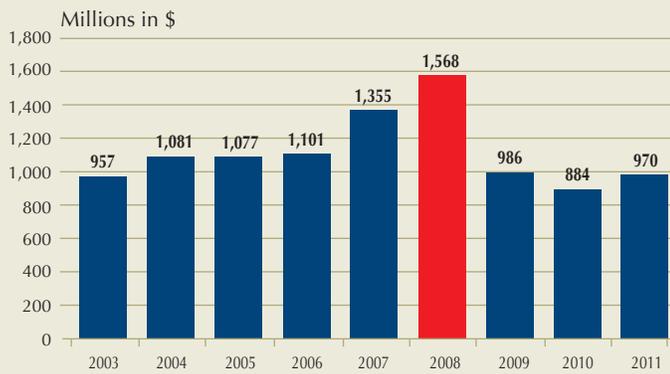
It is important to note that two-way trade figures between the ports within the LACD and Canada are understated. Trade data from the U.S. Census Bureau are classified by customs district rather than the actual source of production and/or final destination. Therefore, overland shipments are underreported for customs districts not bordering the country in question. Also, since much of Southern California's trade with Canada utilizes ground transportation like trains and trucks most of that traffic is captured by inland border ports in customs districts like Seattle, Washington and Detroit, Michigan. As a result, the data in this report that is most representative of actual two-way trade is the California-Canada two-way trade, LAX-Canada two-way trade, and exports from the Los Angeles metropolitan area to Canada.

Even with that important caveat, two-way trade between the LACD and Canada was \$970 million in 2011. An estimated 250,000 Los Angeles County jobs depend on trade with Canada, according to the Canadian Consulate in Los Angeles. The top LACD exports to Canada were refined oil products,



phone, TV, and radio equipment, aircraft engines and parts, compasses, medical and optic instruments, and fertilizers. The top four exports accounted for 80% of total exports. The top LACD imports from Canada were oil, pharmaceutical products, organic chemicals, medical instruments, and electric machinery. The top three imports accounted for 93% of total imports.

LACD 2-Way Trade with Canada 2003-2011



Source: U.S. Census Bureau, USA Trade Online



LACD Top 10 Imports from Canada

Commodities	2011 (millions \$)	% of Canada Total
Refined Oil Products	899.7	50.0%
Pharmaceutical Products	503.6	28.0%
Organic Chemicals	272.4	15.1%
Optical and Medical Instruments	37.8	2.1%
Electrical Equipment and Electrical Components	22.4	1.2%
Computer Parts and Machinery	13.8	0.8%
Aircraft and Parts	10.3	0.6%
Furniture	4.4	0.2%
Cosmetics	3.3	0.2%
Wine	3.2	0.2%
Top 10 Total	1,771.0	98.4%

LACD Top 10 Exports to Canada

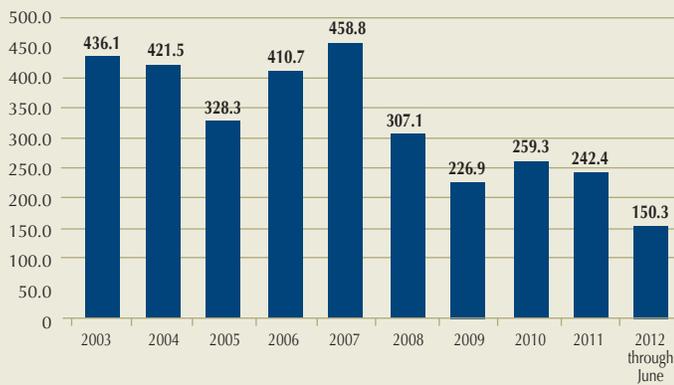
Commodities	2011 (millions \$)	% of Canada Total
Refined Oil Products	111.4	43.2%
Electrical Equipment and Electrical Components	39.8	15.4%
Aircraft and Parts	34.0	13.2%
Optical and Medical Instruments	32.9	12.8%
Fertilizers	17.1	6.6%
Computer Parts and Machinery	10.6	4.1%
Arms and Ammunition	4.2	1.6%
Diamonds	3.5	1.3%
Fish	2.6	1.0%
Apparel and Accessories, Not Knit	1.7	0.7%
Top 10 Total	257.9	94.8%



Los Angeles International Airport (LAX) Trade with Canada

Total two-way trade between LAX and Canada was \$242.4 million in 2011. The top LAX exports to Canada were electric machinery and sound/TV equipment, computers, aircraft and parts, medical instruments, computers, and arms and ammunition. The top three exports accounted for 80% of total exports. The top LAX imports from Canada were medical instruments, electric machinery and sound/TV equipment, computers, aircraft and parts, and furniture. The top four imports accounted for 75% of total imports.

LAX 2-Way Trade with Canada



LAX Top 10 Exports to Canada

Commodities	2011 (millions \$)	% of Canada Total
Electrical Equipment and Electrical Components	39.6	30.2%
Aircraft and Parts	33.7	25.6%
Optical and Medical Instruments	32.9	25.1%
Computers Parts and Machinery	10.6	8.1%
Arms and Ammunition	4.2	3.2%
Diamonds	3.5	2.6%
Fish	2.6	2.0%
Apparel and Accessories, Not Knit	1.7	1.3%
Iron and Steel Products	1.5	1.1%
Cineatographic Goods	1.1	0.8%
Top 10 Total	131.4	93.7%

LACD Top 10 Imports from Canada

Commodities	2011 (millions \$)	% of Canada Total
Optical and Medical Instruments	37.3	36.5%
Electrical Equipment and Electrical Components	18.9	18.4%
Computer Parts and Machinery	9.2	9.0%
Aircraft and Parts	9.1	8.9%
Furniture	4.2	4.2%
Pharmaceutical Products	1.7	1.6%
Cosmetics	1.5	1.5%
Cinematographic Goods	1.2	1.2%
Diamonds	0.8	0.8%
Fish	0.7	0.7%
Top 10 Total	84.6	82.7%





Los Angeles Metropolitan Area Exports to Canada

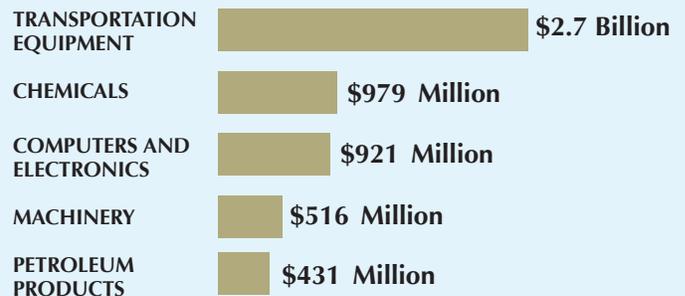


Canada is the Los Angeles Metro area’s #1 export market based on a recent study completed by the *Brookings Institution* called “Export Nation”. The Brookings data includes both goods and services and it is estimated by production location and not based on the origin of movement data that the U.S. Census Bureau produces. The Los Angeles Metropolitan Statistical Area (MSA) includes both Los Angeles County and Orange County.

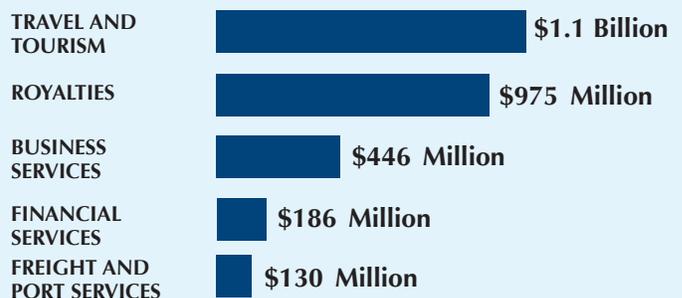
Based on this data, the L.A. MSA had exports equal to \$11.4 billion to Canada in 2010 (the most recent MSA data), which included \$8.3 billion in merchandise exports (goods) and \$3.1 billion in services. The top merchandise or goods exports were transportation equipment, chemicals, computers & electronics, machinery, and petroleum products. The top services exports were travel & tourism, royalties, business services, financial services, and freight & port services. The overall top exports from the L.A. MSA to Canada were transportation equipment, travel & tourism, chemicals, royalties, and computers & electronics.

The top goods export category (transportation equipment) is mainly comprised of aircraft products and parts due to the strong aerospace presence in Los Angeles County. It also highlights the linkages between our local aerospace industry with Canada’s. In addition, the second largest goods export, chemicals, is primarily made-up of pharmaceutical exports. Meanwhile, the computers and electronics commodity category relates to precision instruments. Overall, our top goods exports to Canada are directly related to our competitive and comparative advantages that we possess in high-tech manufacturing. Let’s remember that Los Angeles County is the manufacturing capital of America. Of the top five goods exports the L.A. MSA has witnessed the strongest growth rates in transportation equipment and machinery. After taking a closer look at the services side of the equation, the data demonstrates that tourism, movie royalties, and business services (consulting) have experienced the most robust growth rates over the past few years.

Top Goods Exports



Top Services Exports





Key Seaports and Airports



Seaports

Port of Los Angeles

The Port of Los Angeles (POLA) is located in San Pedro Bay and together with the Port of Long Beach makes up the San Pedro Bay port complex. POLA is located 20 miles south of downtown Los Angeles and is comprised of 7,500 acres, with 43 miles of waterfront and 25 passenger and cargo terminals, including dry and liquid bulk, container, break-bulk, automobiles and warehouse facilities. The Port is also home to the World Cruise Center. The Port of Los Angeles was the busiest port in the U.S. for the twelfth consecutive year in 2011 and should be the busiest port for the thirteenth consecutive year in 2012. Container volumes have more than doubled during the past decade. The POLA is the 16th busiest port in the world and is part of the 8th busiest port complex in the world when combined with the adjacent Port of Long Beach. The POLA handled 7.8 million Twenty-Foot Equivalent Units (TEUs) in Calendar Year (CY) 2010. The total cargo value of trade in CY 2010 was \$236.4 billion. The total cargo tonnage for CY 2010 was 157.8 million metric revenue tons. The port saw 2,182 vessel arrivals in CY 2010, and 150,233 automobiles were handled that year. The CY 2011 figures for the POLA were encouraging as the port handled 7.9 million TEUs.

Port of Long Beach

The Port of Long Beach (POLB) is located in the city of Long Beach and adjacent to the Port of Los Angeles in San Pedro Bay. POLB is located 20 miles south of downtown Los Angeles and is comprised of 3,200 acres with 10 piers, 80 berths and 66 post-Panamex gantry cranes. The Port of Long Beach is the second busiest port in the U.S. It is the 18th busiest port in the world and part of the 8th busiest port complex when combined with the Port of Los Angeles. POLB handled 6.1 million Twenty-Foot Equivalent Units (TEUs) in 2011. The Port handled total cargo valued at \$155 billion in 2011. The port serviced 4,898 vessels in 2011 and 76.6 million metric tons of cargo. On average, the Port of Long Beach handled the equivalent of nearly 16,600 TEUs each day during CY 2011.

Port Metro Vancouver

The Port of Vancouver is Canada's largest and busiest port. It is the fourth largest tonnage port in North America and the fifth busiest port in North America. Port Metro Vancouver is also the most diversified port in North America. It operates across five business sectors including cars, breakbulk, bulk, container, and cruise. The port handles trade with over 160 countries and almost 130 million tons of cargo each year.

Port of Montreal

The Port of Montreal is Canada's second busiest port and one of the largest inland ports in the world. It is the 14th busiest port in North America. The port is the most diversified port in Eastern Canada and a vital part of the Montreal economy. Also, it is the only container port along the Quebec-Ontario Continental Gateway, which moves nearly 75% of Canada's trade.



Airports

Los Angeles International Airport (LAX)

Los Angeles World Airports is the airport operations department for the City of Los Angeles which owns and operates Los Angeles International Airport (LAX) and Los Angeles/Ontario International Airport. LAX is another key link in L.A. County's international trade, as it handles high-value products such as medical instruments, electronics, and perishables. The international airport is served by 43 international carriers and all major air freight lines including the major Canadian airline (Air Canada). LAX has become a pivotal distribution center for cargo from throughout the globe including Canada. LAX was the 13th busiest cargo airport in the world in 2011 as it handled 1.7 million metric tons of air cargo. In addition, it is the 6th busiest passenger airport in the world (maintaining its #6 position in 2011 and 2010 after falling to #7 in 2009) as it handled 61.8 million passengers in 2011 (3.8 million more than in 2010). LAX is the world's busiest origin-and-destination airport.

Toronto's Pearson International Airport (Canada's Largest International Airport)

Pearson Airport is served by over 65 airlines providing service to over 155 international destinations. The airport handled 33.4 million passengers and over 400,000 flights in 2011. Pearson was the 38th busiest passenger airport in the world and the 23rd busiest airport by international passenger traffic. Also, it is ranked in the top 30 in cargo activity. Pearson Airport is the largest hub for Canada's largest airline, Air Canada.

Montreal's Pierre Elliott Trudeau International Airport and Mirabel International Airport

Trudeau Airport is the busiest airport in the province of Quebec. It is the third largest in Canada based on passenger traffic and the fourth busiest based on the number of flights. The airport handled 13.7 million passengers and over 230,000 flights in 2011. Trudeau is one of four Air Canada hubs and the headquarters for Air Canada. Bombardier Aerospace has an assembly facility at the airport which builds regional and business jets. Montreal has another airport called Mirabel which primarily handles air cargo. In addition, Mirabel is the manufacturing base for Bombardier Aerospace, where final assembly takes place.

Vancouver International Airport

Vancouver International Airport is the second busiest airport in Canada based on passenger traffic and aircraft movements. The airport handled 17 million passengers and nearly 300,000 aircraft movements in 2011. The airport is a hub for Air Canada, Air Canada Express, and Air Transat. Vancouver International has been named "The Best Airport in North America" and for the first time it made the list of top 10 airports in the world in 2012.



Tourism between the U.S./California and Canada

Tourism between the U.S./California and Canada has had a substantial impact on the respective economies over the past decade. Over 20 million Canadians visited the U.S. in 2011, while over 1.7 million Canadians visited California in 2011 and spent \$1.4 billion. Canada is California's second largest source of foreign tourism after Mexico. In addition, over 1 million Californians visited Canada and spent approximately \$675 million. The most popular destinations for Californians visiting Canada include Vancouver (including Victoria and Whistler), the Canadian Rockies, and Toronto. The key business destinations are Toronto (as it is the financial capital of Canada), Montreal, and Vancouver. The Province of Ontario has the most significant economic ties to California. Meanwhile, the most preferred California destinations for Canadians include the Los Angeles metro area (which has gained popularity over the past decade), San Francisco, Palm Springs, and San Diego.

Tourism between Los Angeles and Canada

The top sources of international visitors to Los Angeles are Mexico, **Canada**, Australia, UK, and China. Mexico had the largest number of visitors in 2011 with 1.6 million followed by Canada with 675,000. Canadian visitation has grown by nearly 77% since 2001, reaching a record high of 675,000 visitors last year. In fact, Canadians contributed \$353 million to the local economy in 2011. There are an average of 160 flights per week from Canada to LAX with an average weekly inbound seat capacity of 20,500.



SECTION FOUR Investment Ties

Foreign Direct Investment (FDI)

The U.S. Bureau of Economic Analysis (BEA) defines foreign direct investment (FDI) as “ownership or control, directly or indirectly, by one foreign person, or entity, of 10 percent or more of the voting securities of an incorporated U.S. business enterprise or an equivalent interest in an unincorporated U.S. business enterprise.” FDI is normally divided into two categories: 1) greenfield investment and 2) mergers and acquisitions. Greenfield investment involves the creation of new businesses and the development or expansion of production facilities. Mergers and acquisitions involve the purchase of existing enterprises.

FDI Projects in North America in 2010 – States and Provinces

In 2010, North America attracted a total of 1,573 FDI projects, based on data from the Financial Times. These accounted for an estimated \$67.3 billion in capital investment and the creation of roughly 144,000 jobs. California was the top destination in 2010 by number of projects with 172, accounting for 10.9% of the projects in North America. The Canadian province of Ontario ranked second as it attracted 127 projects, accounting for 8.1% of the total projects. Ontario FDI projects amounted to \$6.1 billion in capital investment and generated over 11,000 jobs in Ontario. More than half of those FDI projects into Ontario were from the U.S, mainly in electronic components, software & IT services, and business & financial services. Also, the top two destinations for the largest number of renewable energy projects were in California and Ontario.

U.S. Investment into Canada

The U.S. is Canada’s largest foreign investor. U.S. FDI into Canada was \$296.7 billion in 2010 (the latest data available). This was an increase of over 11% from 2009. The sectors that attract the most investment are mining, petroleum, chemicals, manufacturing, nonbank holding companies, and finance and insurance. The total value of sales of services in Canada by American companies was over \$100 billion in 2009. There are roughly 1 million Canadians employed by over 22,000 U.S. companies that are operating in Canada.

Canadian Investment into the U.S.

Canada is the fifth largest investor in the U.S. behind the UK (432.5 billion), Japan (\$257.3 billion), the Netherlands (\$217.1 billion), and Germany (\$212.9 billion). Canadian investment into the U.S. was \$206.1 billion in 2010, which was an increase of nearly 2% from 2009. Canadian investment is mostly in finance and insurance, manufacturing, banking, retail trade, and other services. The total value of sales of services in the U.S. by Canadian companies was \$70 billion in 2009.



Canadian Investment into California

Canada is one of the largest investors in California based on preliminary 2009 data from U.S. Department of Commerce's Bureau of Economic Analysis (BEA). There are over 300 Canadian-owned companies in California that directly employ more than 34,000 people. Circle K Stores and Stantec Consulting Inc. are two of the largest employers in California.

Canadian Investment into Los Angeles County

Canada is the fifth largest source of foreign-owned and -affiliated businesses in Los Angeles County, based on preliminary analysis of 2012 business data by the LAEDC. Out of a total of 347 establishments, the largest industry area for Canadian-owned companies is retail trade with 55 total establishments. This is followed by finance and insurance (37 total establishments) and professional, scientific, & technical services (36 total establishments) and wholesale trade (36 total establishments).

Canadian-Owned Establishments by Major Industry Sector

Sector	Total Establishments	% of Total
Retail Trade	55	15.8%
Finance & Insurance	37	10.7%
Professional, Scientific, Technical Services	36	10.4%
Wholesale Trade	36	10.4%
Manufacturing	34	9.8%
Information	32	9.2%
Other Sectors	117	33.7%
Total	347	100.0%

Source: LAEDC

In retail trade, the major sub-sector is food & beverage stores (Circle K convenience stores). In the second major industry sector, finance & insurance, the major-sub sector is insurance carriers & related activities (John Hancock Life Insurance).

In addition to Circle K and John Hancock Life Insurance, major Canadian names operating in Los Angeles County

include IMAX Entertainment, Lionsgate Entertainment, Bombardier, Thomson Reuters, Cirque du Soleil, The Stronach Group (Magna Entertainment), Aldo Shoes, RBC Wealth Management, and Air Canada.

The City of Los Angeles is host to the largest number of Canadian-owned and -affiliated businesses, with 89 total establishments, followed by other key cities like Santa Monica, Burbank and Glendale. The Los Angeles area has become one of the key commercial centers for several Canadian companies entering into the Western U.S. market.

Canadian-Owned Establishments by City

City	Total Establishments	% of Total
Los Angeles	89	25.6%
Santa Monica	21	6.1%
Burbank	17	4.9%
Glendale	11	3.2%
Other Cities	209	60.2%
Total	347	100.0%

Source: LAEDC

In a comprehensive multi-country study of foreign direct investment in Los Angeles County that was completed in 2008, the LAEDC identified 278 Canadian-owned business establishments in 2007. It is noteworthy that the number of Canadian-owned establishments grew between 2007 and 2012, especially considering the occurrence of the Great Recession during the intervening years. The 2008 study estimated the economic impact of Canadian investment in the county. The 278 Canadian-owned establishments in the county created 7,000 direct jobs and 9,800 indirect jobs totaling 16,800 jobs, translating total of \$832 million in wages and salaries related to Canadian investment into Los Angeles County.



PROFILES OF COM DEV AND WB GAMES MONTREAL

Com Dev USA has a 46,000 square foot facility in El Segundo. The company employs roughly 100 people that supply communications hardware to U.S. National Security Space programs. Com Dev USA has invested \$20 million in capital and generates approximately \$50 million in annual revenues.

WB Games Montreal was established in 2010 with support from the Government of Quebec. The company is located in Montreal and develops AAA and Online Casual titles using Warner Bros. and DC Entertainment intellectual property. WB Games has about 140 employees and is expected to increase its employee base to 400 by 2014. In 2011, total expenditures in Quebec were \$56 million. WB Games Montreal is part of Warner Bros. Entertainment which is headquartered in Burbank.

Where Will Canada Invest?

The U.S. is an attractive area for Canadian investment for two main reasons. First, the U.S. has the largest consumer market in the world. Second, the U.S. market presents few challenges that are major issues in other worldwide markets. Within the U.S. Los Angeles County is an attractive location for FDI for several reasons:

- With roughly 10 million residents, Los Angeles County alone is the largest county consumer market in the country. Moreover, across the five-county L.A. metro area, there are 18 million residents within a 60 mile radius of downtown Los Angeles.
- Los Angeles County is home to three world class research institutions (Caltech, USC, and UCLA), a large number of highly regarded colleges and universities, and a large pool of R&D talent.
- Los Angeles County can readily and cost-effectively serve as Canada's gateway to emerging consumer and business markets in Asia and Latin America.
- First rate transportation infrastructure, which includes the ports, rails, intermodal resources, established logistics and Los Angeles International Airport (LAX).

Based on research, the LAEDC believes investment opportunities lie in the green/clean technology industries and renewable energy. Entertainment, digital media, aerospace, life sciences, and water treatment also will be core areas, as these industries have been targeted by both the public and private sectors in Canada. Other key industries likely to attract Canadian investment include financial services, machinery and equipment, biopharmaceuticals, business services, food processing, and chemicals.

According to recent LAEDC research and analysis, Canadian investment will predominantly come in the form of technology as well as possibly in the form of manufacturing. Technology will complement the concentration of manufacturing facilities that already exists in Los Angeles County. In fact, the key reason why this type of investment should come to Los Angeles County is that the region is the capital of American manufacturing, particularly hi-tech manufacturing. Distribution centers also are expected to draw much attention by Canadian companies looking to expand into the U.S. Such investment will have to include sales and service offices in order to provide critical customer service. FDI will also come in the shape of research and development facilities in order to promote crucial innovation to remain competitive. Also, the FDI could come in the form of western regional headquarters (HQ) (U.S.). In addition, critical emphasis will be placed on maintaining the operations of those small & medium sized Canadian companies already located in L.A. County as well as attracting new companies in the industry areas mentioned above.

Los Angeles County FDI – Green/Clean Technology Strategy

In 2009, the LAEDC facilitated the creation of L.A. County's first ever consensus **Strategic Plan for Economic Development**. The Plan (developed by more than a thousand business, labor, government, educational, and environmental organizations) contains a specific strategic objective to attract more foreign direct investment into the county during its five-year implementation period from 2010-2014.

As one of the main foreign investors in Los Angeles County, Canada continues to be a major focus for Los Angeles County to attract, retain, and grow foreign direct investment. The County of Los Angeles has been pursuing foreign investment from Canada in recent years, an effort that will only continue as Canada continues to outperform the other advanced economies. The World Trade Center Association Los Angeles-



Los Angeles County FDI – Green/Clean Technology Strategy (continued)

Long Beach (WTCA), a subsidiary of the LAEDC, has a very strong interest in attracting investment in the area of green/clean technology and renewable energy. Part of the WTCA's Los Angeles-Long Beach "green strategy" includes targeting and attracting Canadian investment in renewable energy and green infrastructure. The focus in the renewable energy industry lies with solar, fuel cells, bio-fuels, and wind.

Efforts to attract this type of investment are proceeding on many fronts including state and federal legislation, incentives, access to various funding sources and valuable resources that will facilitate the overall process. Examples are:

State Legislation

- **California Assembly Bill (AB) 32** – California Global Warming Solutions Act
- **California Assembly Bill (AB) 811 and (AB) 474** – Energy Efficiency and Renewable Energy Financing Program
- **The Green Building Initiative and the accompanying Green Building Action Plan California Assembly Bill (AB) 939** – The Integrated Waste Management Act
- **Renewable Portfolio Standard (RPS) and Senate Bill X12** – Requiring utilities to provide power from renewable sources
- **California Air Resources Board's (CARB's) Low Emission Vehicle (LEV) Program** – Sets emission reduction standards for automobiles

Green Opportunities

- **California ranks as the 10th largest consumer of energy in the world**
- **The San Pedro Bay Ports Clean Air Action Plan (CAAP)** – Sets standards and aims to reduce air pollution of ships, trains, trucks, and other heavy machinery that are used in moving goods
- **Los Angeles County** – Green Initiatives in cities and unincorporated areas throughout the county
- **The Antelope Valley** – Centrally located to 95% of the state's wind-generating capacity and output

Federal Funding for Renewable Energy

- **\$2.5 Billion** for applied research, development, demonstration and deployment of energy efficiency and renewable energy technologies
- **\$1.25 Billion** for wind, solar, water power, hydrogen, vehicles, industrial and building technologies
- **\$1.25 Billion** for competitive solicitation for a range of industrial and energy efficiency improvement projects
- **\$4.5 Billion** for developing the smart electricity grid
- **\$30 Billion** for investments in applied research, loan guarantees and grants to develop new technologies in partnership with industry, energy efficiency and conservation activities
- **\$4.2 Billion** to make Department of Defense facilities more energy efficient

Billions for Los Angeles County Infrastructure Projects

- **\$35 Billion** – Measure R: Funding L.A. County Transportation Projects
- **\$4.1 Billion** – Modernizing LAX
- **\$5.5 Billion** – To Upgrade and Green the Ports of LA and Long Beach





The federal government along with the state and county governments are trying to facilitate the investment process by providing access to funding sources. The private sector also plays a key role as private equity and venture capital firms provide substantial opportunities. Other critical sources are grants and guaranteed loans.

PROFILE

SoCal Edison’s Electric Vehicle (“EV”) Technical Center - Pomona



The Southern California Edison’s (“SCE”) EV Technical Center is one of only two U.S. Department of Energy test sites approved to test electric vehicle performance in fleet operations. The Center was established in 1993, and it provides an array of electric transportation services centering on solutions for automakers, battery manufacturers, government agencies, business and industrial fleet customers and residential customers.

The SCE EV Tech Center serves the following purposes:

- To help the SCE’s Transportation Services Department manage the nation’s largest and most successful fleet of pure battery-electric vehicles. To date, the EV fleet has logged more than 17 million tailpipe-emission-free miles;
- To evaluate various electric-drive technologies for uses in SCE’s own fleet applications to meet federal and state regulations;
- To understand and help minimize potential impacts of large increases in the numbers of vehicles connecting to the grid. This includes helping customers shift charging to off-peak (low-energy-use) periods;
- To provide education and outreach on the safe, reliable and energy-efficient use of electric-drive technologies

The EV Center includes the following state-of-the-art Equipment:

- Electric vehicle testing and maintenance facilities
- “Garage of the Future” – capable of simulating volt charging, energy flow, energy storage, energy generation and meter control
- Charge testing and fast charge testing facilities
- Maintenance bay for hydrogen Internal Combustion Engine (ICE) and fuel cell EV prototypes
- Battery testing laboratory

Canada’s Commitment to Going Green

Canada is one of the most committed nations in the world in reducing greenhouse gas emissions. Canada has set a goal of reducing emissions by 17 percent from 2005 levels by 2020. For example, it has established tough regulations in the automotive sectors with mandatory gas emission standards, while also implementing measures at old coal-fired electricity generation facilities. Overall, the Canadian government has invested more than \$10 billion Canadian in green infrastructure, energy efficiency, clean energy technologies, and the production of cleaner energy over the last six years. In August 2012, the Canadian government announced that Canada was half way towards meeting its 2020 greenhouse gas emission target.

Canada and Renewable Energy

The Canadian government offers the following incentives for renewable energy:

- Accelerated capital-cost allowance of 50% for clean-energy generation
- The Scientific Research and Experimental Development Program funds research and development of new, improved or technologically advanced products or processes
- Sustainable Development Technology Canada (SDTC) provides financing to foster the development, demonstration, and commercialization of emerging renewable energy technologies. In particular, SDTC’s NextGen Biofuels Fund and SD Tech Fund support clean-technology projects through these critical stages
- Home of North America’s most comprehensive renewable energy tariff program – Ontario’s Feed-in Tariff (FIT) was created in 2009 and is the cornerstone of the province’s Green Energy Act, which is part of Ontario’s plan to become a leading green economy in North America

The Canadian Clean Energy Fund is investing \$795 million Canadian over five years in research, development, and demonstration projects to advance Canadian leadership in clean energy technologies. This includes large-scale carbon capture and storage demonstration projects as well as smaller-scale demonstration projects of renewable and alternative energy technologies.



Los Angeles – Green L.A.: An Action Plan to Lead the Nation in Fighting Global Warming

In May 2007, Mayor Antonio Villaraigosa in partnership with the Los Angeles City Council and environmental leaders unveiled GREEN L.A. – An Action Plan to Lead the Nation in Fighting Global Warming. The long-term goal is to reduce the City of Los Angeles’ greenhouse gas emissions by 35% below 1990 levels by 2030. This goal goes beyond the targets set in the Kyoto Protocol and is the greatest reduction target of any large American city.

The plan outlines the actions that the public and private sectors need to take to reduce greenhouse gas emissions: promoting green energy, conserving water, building a world-class transportation system, reducing waste, greening the port and airports, creating more open space and park land, and adapting Los Angeles’ economy to the realities of global climate change. Green LA offers a blueprint for reducing the city’s carbon footprint and addressing climate change.

Ownership of the largest municipal utility in the country, the Los Angeles Department of Water and Power, allows the City to directly affect a major source of green house gases from electricity production. Overall, one-third of CO2 emissions are from the City operations. Currently, Los Angeles is more than halfway toward meeting the U.S. emissions target outlined by the Kyoto Protocol.

L.A. County and Canada Trade and Investment Events

1. **Annual Milken Global Conference** – April/May
2. **Annual U.S. Commercial Service Americas Business Forum**
3. **Financial Times Global Investment Series: Focus on Canada** – March 2011, September 2011, Fall 2012, and Winter 2013
4. **Annual VerdeXchange Conference in both Los Angeles and Toronto** – November 2012 (Toronto) and February 2013 (Los Angeles)

Los Angeles County Based Venture Capital, Private Equity, and Investment Banking Firms Active in Canada

Greif & Co.

Greif & Co. is a middle market investment banking firm founded in 1992 by Lloyd Grief in downtown Los Angeles. Greif & Co. has become one of the leading financial advisory firms on the West Coast and has a strong international presence. The firm specializes in providing corporate advisory services to entrepreneurial companies at every stage of development including, corporate finance activities: mergers & acquisitions, leveraged buyouts, private placements of equity and debt securities (venture capital, senior subordinated debt); financial advisory services: rendering business valuations, fairness opinions, and financial restructuring assistance.

The firm’s Canada transactions include:

- Horizon Publications
- The Loewen Group
- United Westburne

Leonard Green & Partners

Leonard Green & Partners (LG&P) is a private equity firm that was founded by Leonard Green in 1989 in Los Angeles. LG&P invests in established companies that are leaders in their fields. The firm has roughly \$9 billion in capital under management and has invested in 45 companies over the past twenty years. The firm does have a connection to Canada as it has an investment in Authentic Brands Group (ABG). ABG is an intellectual property corporation with a mandate to acquire, manage and build long-term value in prominent consumer brands. ABG has offices in Toronto and Los Angeles.



SECTION FIVE Business Ties

Fortune 500 Companies based in Los Angeles County and Present in Canada

The Walt Disney Company

FY 2011 Revenues: \$40.9 Billion

The Walt Disney Company, founded in 1923 in Los Angeles, is headquartered today in Burbank. Walt Disney in Canada has employees situated across the country. The majority of its businesses operate out of a corporate office in Toronto, Ontario. Disney also has businesses operating out of Kelowna, British Columbia (Club Penguin), and Vancouver, British Columbia (Pixar Canada).

Occidental Petroleum

FY 2011 Revenues: \$24.2 Billion

Oxy Energy Canada, Inc. (OEC) is a subsidiary of Los Angeles based Occidental Petroleum Corporation (Oxy). OEC's primary business is to market natural gas in Canada, and in conjunction with Occidental Energy Marketing Inc. (OEMI), to provide secure Canadian-sourced supplies to service U.S. markets through main transportation corridors. OEC also leases storage and transportation assets to help protect against market volatility.

Jacobs Engineering Group

FY 2011 Revenues: \$10.4 Billion

Jacobs Engineering is the one of the largest public engineering and construction firms in the world with headquarters in Pasadena. The company has six offices in Canada. They include Calgary and Edmonton, Mississauga, Pickering, Toronto, and Vancouver. Jacobs Engineering's recent contracts in Canada include Vale Canada – Sulfuric Acid Plant in Ontario, it's a leading contractor in Alberta's oil sands, and its facility in Pickering, Ontario has supplied more than 1,600 proprietary coolers to clients for more than 40 years.

Reliance Steel and Aluminum

FY 2011 Revenues: \$8.1 Billion

Reliance Steel and Aluminum, headquartered in Los Angeles, is the largest metals service center company in North America. The company has a network of more than 200 locations in 38 states, Canada, Korea, Belgium, China, Malaysia, Mexico, Singapore, and the United Kingdom. Reliance Metals Canada Limited (RMCL) is a leading metal services company in Canada with its corporate headquarters located in Edmonton, Alberta. RMCL has three divisions (Encore Metals and EMJ Canada and Team Tube). RMCL specializes in processing and the distribution of metal products through 14 distribution facilities in Canada.



Fortune 500 Companies based in Los Angeles County and Present in Canada (continued)



AECOM

FY 2011 Revenues: \$8.0 Billion

AECOM, one of the largest engineering design firms in the world, serves the transportation, facilities, environmental, energy, water and government markets. AECOM was established by the merger of six separate firms in 1990. AECOM has acquired more than 30 companies and has become one of the largest professional, technical, and management support services firms in the world. The company is based in downtown Los Angeles and operates in approximately 125 countries including Canada. AECOM has 45,000 employees worldwide. AECOM provides the following services: architecture, building engineering, design & planning, economics, energy, environment, geotechnical, government services, project and program management, transportation, urban development, and water.

AECOM has 57 offices in Canada including Calgary, Edmonton, Mississauga, Montreal, Ottawa, Quebec, Vancouver, and Winnipeg. AECOM is the dominant engineering design firm in Canada. The company is helping deliver 44% of Canada's large-scale infrastructure projects. Some of the key projects include:

- Montreal University Hospital Center
- Ontario's Air Rail Link
- Romaine Hydroelectric Complex in Havre-St-Pierre, Quebec
- Turcot Interchange in Montreal
- Spadina Subway Extension Stations Design in Toronto
- Autoroute 30 in Montreal
- Windsor-Essex Parkway in Windsor, Ontario
- Calgary International Airport
- Woodward Avenue Wastewater Treatment Plant in Hamilton, Ontario
- Southeast Collector Trunk Sewer in Ontario
- Sydney Tar Ponds and Coke Oven Site Remediation in Sydney, Nova Scotia
- Highway 63 Corridor in Fort McMurray, Alberta
- Kingston Subdivision Project in Ontario

Dole Food Company

FY 2011 Revenues: \$7.2 Billion

Dole, which is based in Westlake Village, has 36,000 employees and operates in more than 90 countries including Canada. Dole Foods of Canada produces and markets fresh fruits and vegetables. In addition, the company supplies packaged and frozen foods. Dole Canada is based in Markham, Ontario. Dole Foods of Canada operates as a subsidiary of Dole Food Company Inc.

Avery Dennison

FY 2011 Revenues: \$6.8 Billion

Avery Dennison Corporation was founded in 1935 and is headquartered in Pasadena. Avery Dennison has over 30,000 employees in nearly 50 countries including Canada. Operations in Canada include a Label and Packaging Materials in Pickering, Ontario and Montreal, Quebec, and Retail Branding and Information Solutions in Oshawa, Ontario.

Mattel

FY 2011 Revenues: \$6.3 Billion

Mattel, headquartered in El Segundo, is the world's biggest toy importing company and the largest toymaker in the U.S. As of 2008, Mattel employs approximately 29,000 people in 43 countries (including Canada) and territories. The North American continent is home to 30% of Mattel employment. California consists of 43% of Mattel's U.S. employment. Mattel's products are sold directly to retailers and wholesalers in Canada. Mattel Canada is located in Mississauga, Ontario.

CB Richard Ellis Group (CBRE)

FY 2011 Revenues: \$5.9 Billion

CB Richard Ellis Group is the world's largest commercial real estate services company and has more than 30,000 employees in over 300 offices worldwide. CB Richard Ellis is headquartered in Los Angeles, near Santa Monica. CBRE has 19 offices in Canada, including a Canada Global Corporate Services office in Toronto. CBRE Canada regularly publishes Canadian Market Reports and includes RealNet Canada. CB Richard Ellis Canada provides leasing, sales, valuation, investment, asset management, research, and consulting services to its clients.



Live Nation Entertainment

FY 2011 Revenues: \$5.4 Billion

Live Nation is the world's largest live entertainment company and is headquartered in Beverly Hills. Live Nation Canada includes Ticketmaster and Ticketweb Canada. The company has office locations throughout Canada with its regional head office in Toronto.

Los Angeles County Companies Present in Canada

PROFESSIONAL AND BUSINESS SERVICES

Korn/Ferry International

Headquartered in Los Angeles, Korn/Ferry has become the worldwide leader in executive recruitment and talent management. The company has established 90 offices in 40 countries, including Canada. Korn/Ferry International has offices in Toronto (Head Office), Montreal, Vancouver and Calgary.

Parsons

Parsons is an engineering, construction, technical, and management services company based in Pasadena. The company dates back to 1944. The firm mainly focuses on infrastructure, environmental, and defense projects in the U.S. and in 25 countries including Canada. Parsons has seven office locations in Canada located in Alberta (Calgary and Edmonton), Ontario (Toronto, Mississauga, and Markham), British Columbia (Langley), and Manitoba (Winnipeg).

Tetra Tech

Tetra Tech is a global consulting, engineering, and technical services firm headquartered in Pasadena. Tetra Tech has 13,000 employees and it had revenues of \$2.6 billion in 2011. Tetra Tech has 330 office locations in 20 countries including Canada. In fact, Tetra Tech has a very significant presence in Canada as it has 46 offices in eight different provinces.

HOSPITALITY AND TOURISM

Princess Cruises

Princess Cruises is the third largest cruise line in the world and is headquartered in Santa Clarita. There are a few available cruise destinations in Canada, including Vancouver, Nova Scotia, and Quebec City. The two main cruise ships include the Caribbean Princess and the Emerald Princess. Cruises to and from Canada include Canada Cruise Vacations to Halifax, Nova Scotia and Quebec City, Quebec and Canada Cruise tours (Maple Explorer) to Niagara Falls, Quebec City, and Rideau Canal.

FASHION DESIGN & PRODUCTION

Los Angeles County is the apparel manufacturing capital of America and is home to many well-recognized designer labels including American Apparel, BCBGMAXAZRIA, Forever 21, Guess, Karen Kane, 7 for all Mankind, and True Religion.



American Apparel – Made In Downtown L.A.

American Apparel is a clothing designer, manufacturer, distributor and retailer located in downtown Los Angeles. The company primarily offers t-shirts, denim, sweaters, jackets and other casual wear. All operations are located in the downtown Los Angeles headquarters including design, knitting, dyeing, cutting, sewing, marketing and distribution. The company's founder Dov Charney is from Montreal and started in the business by selling American T-shirts outside concerts in Montreal. The company has a head office and distribution center in Montreal. The first American Apparel retail stores were in Montreal and Toronto. The downtown Los Angeles location also has many Canadian employees.

- American Apparel has the largest garment factory in the U.S. The company has over 10,000 employees with 5,000 in Los Angeles and operates more than 260 retail stores in 19 countries.
- There are 27 American Apparel stores in Canada in eight different provinces.



Los Angeles County Companies Present in Canada (continued)

FASHION DESIGN & PRODUCTION

BCBGMAXAZRIA

BCBG is a high-quality clothing company founded in 1989 by Max Azria and is based in Los Angeles. The first BCBG boutique was opened in Los Angeles in 1992. BCBG has 56 store locations in Canada.

Forever 21

Forever 21 is a specialty retail clothing company founded in 1984 in downtown Los Angeles. The company has stores throughout the U.S., Canada, the Middle East and Asia. Forever 21 opened its first location in Edmonton, Alberta and now has 21 store locations in Canada. Forever 21 is best known in the industry as the clothing company that offers the latest fashions at affordable prices. Forever 21 was chosen as one of the top three teen shopping brands nationwide.

GUESS

The company designs, markets, distributes, and licenses apparel and is based in Los Angeles. GUESS has 1,055 total stores (including directly operated, distributors, and licensees) located in 85 countries outside the U.S. and Canada. There are 504 directly operated stores in the U.S. and Canada. GUESS has 115 stores in Canada. In addition, GUESS has administrative offices, showrooms, and warehouse facilities in Toronto, Montreal, and Vancouver.

7 for All Mankind

7 for All Mankind launched in 2000 in Los Angeles as a premium denim jean company and has recently expanded into other product lines. 7 for All Mankind products are sold in its stores, department stores and boutiques in over 80 countries around the world including Canada. 7 for All Mankind has three locations in Canada: Toronto, Calgary and Edmonton.

True Religion

Founded in Vernon in 2002, True Religion is a premium denim jeans company, and has recently added a sportswear line. True Religion launched its own retail stores across the U.S. and offers products in a handful of retail locations throughout Canada. True Religion's distributor in Canada is ANV Clothing and it is located in West Montreal. True Religion has 75 store locations throughout Canada.

Lucky Brand

Lucky Brand was established in 1990 in Vernon as a jeans company by two friends, Gene Montesano and Barry Perlman. Lucky Brand now has stores throughout the U.S., Canada, Middle East and Asia. There are ten stores in Canada, four in Ontario, three in British Columbia, two in Alberta, and one in Manitoba.

Karen Kane

Karen Kane has a 150,000 square foot facility in Los Angeles. The company distributes clothing all over the world, mostly to major department stores. Karen Kane manufactures its clothing in both Los Angeles and China. The company sells its clothing in Canada.

ENTERTAINMENT

Los Angeles County is the entertainment capital of the world. It is home to major studios such as Disney, Fox, Paramount, DreamWorks, Sony/Columbia, NBC/Universal, Warner Brothers and Lionsgate. Los Angeles County leads the world in producing and distributing popular movies, television programs, video games and recorded music and is home to the Oscars, Emmy and Grammy award shows. In addition to Disney (profiled within the Fortune 500 section), DreamWorks, Lionsgate (profiled within the Canadian companies section), NBC/Universal, Paramount, Sony/Columbia and Warner Brothers have operations in Canada.

DreamWorks

DreamWorks is a film studio that develops, produces and distributes films, video games and television programs and is headquartered in Universal City. Dreamworks Animation has its headquarters in Glendale. DreamWorks has an office in Toronto. DreamWorks has an outreach program that works with universities to identify students who might have potential as DreamWorks artists and engineers. USC, UCLA, and the Vancouver Film School participate in the outreach program.



20th Century Fox

Twentieth Century Fox is one of the six major American film studios, and they are located in Century City. Their most popular film franchises include Avatar, The Simpsons and Star Wars. 20th Century Fox Canada has an office in Mississauga, Ontario.

Universal Pictures (NBC/Universal)

Universal Pictures is a subsidiary of NBC/Universal. Founded in 1912, Universal Pictures is one of the oldest American movie studios still in continuous production. Its production studios are located in Universal City. Universal Pictures Canada represents the Canadian division of NBC Universal. It is located in the Universal Studios offices in Toronto.

Paramount Pictures

Paramount Pictures is one of the original major motion picture studios with a library of 2,500 titles. The company is owned by Viacom and is based in Hollywood. Paramount Pictures has film studios in Canada. From 1994 to 2006 Paramount Parks owned Canada's Wonderland theme park. Paramount distributes De Laurentiis Entertainment Group films in Canada.

Sony/Columbia

Sony Pictures Entertainment's global operations include: motion picture production and distribution, television production and distribution, digital content creation and distribution, worldwide channel investments, home entertainment acquisition and distribution, operation of studio facilities, development of new entertainment products, services, and technologies, and distribution of filmed entertainment in more than 130 countries including Canada. Sony Pictures is headquartered in Culver City. Sony Pictures Entertainment's international motion picture operations include Sony Pictures Canada.

Warner Brothers

Warner Brothers Entertainment Inc. also known as Warner Brothers is a film and television entertainment company based in Burbank. The company is a subsidiary of Time Warner and owns multiple subsidiaries including Interactive, New Line Cinema, The WB, and DC Comics. Warner Brothers Entertainment International operations include Warner Brothers Canada. Warner Brothers established WB Games Montreal in 2011.

SimEx-Iwerks Entertainment

SimEx-Iwerks is the product of a merger between Toronto based SimEx and Los Angeles based Iwerks that took place

in 2002. The company has maintained both offices and is a perfect representative of Canada-Los Angeles business ties. The combined company is the leading entertainment company specializing in 3-D and 4-D cinematic experiences.

TECHNOLOGY

Teledyne Technologies

Teledyne Technologies is based in Thousand Oaks and was established in 1960. The company has operations in the U.S., Canada, the UK and Mexico. In February 2011, Teledyne Technologies acquired DALSA Corporation of Waterloo, Ontario, which specializes in digital image sensors and semi-conductors. DALSA's sensors (manufactured in Quebec) have played an instrumental role in the Mars Exploration Rover missions, which have been designed with the Jet Propulsion Laboratory in Pasadena.

Robinson Helicopter

Robinson Helicopter Company was founded in 1973 by Frank Robinson and is based in Torrance. The company has 1,200 employees and is a leading producer of helicopters in North America. The company has 110 factory-authorized dealers and 290 service centers in 50 countries including Canada. There are 35 dealers and service centers in Canada.

Trojan Battery

Trojan Battery Company was established in 1925 in the Los Angeles area and moved to its current headquarters in Santa Fe Springs in the 1960s. The company is the world's leading manufacturer of deep cycle battery technology. Trojan Battery has dealers in seven Canadian provinces and has a distributor network in Canada.

BIOMEDICAL

Obagi Medical Products

Obagi Medical Products is involved in the development, manufacturing and marketing of prescription skin care products. The company is based in Long Beach and is the top provider of topical aesthetic and skin care systems in the physician-dispensed market. Obagi has greatly expanded its operations across the globe and now has distribution partners in more than 42 countries, including Canada. The international distributor for Canada is RGR Pharma and is located in La Salle, Ontario.



Los Angeles County Companies Present in Canada (continued)

BIOMEDICAL

Sunrider

Sunrider is a wholesale distributor/franchiser and commercial real estate company with thousands of franchise stores worldwide and with hotels in Beijing. The company is headquartered in Torrance. Sunrider was founded by Dr. Tei-Fu Chen and Dr. Oi-Lin Chen, who immigrated to the U.S. in the 1970s. Sunrider conducts business in over 40 countries including Canada with over 7,000 retail stores. The firm has offices in over 20 countries including one office in Port Coquitlam, British Columbia.

Other Los Angeles County Based Firms Present in Canada

Nestlé U.S.A.

Nestlé U.S.A is part of Nestlé S.A. of Switzerland, the world's largest food company. Nestlé U.S.A is headquartered in Glendale. The company has 26 manufacturing facilities, 22 distribution centers and more than 21,000 employees in California, Connecticut, New Jersey, and Missouri. Nestlé Canada, Ltd. is headquartered in North York, Ontario. Nestlé's most popular products in Canada include Nestle Baby, Waters, Professional, and Nutrition, and Lean Cuisine, Haagen-Dazs, Powerbar, and Purina.

Pelican Products

Pelican Products is a manufacturing firm located in Torrance. The company distributes its products in over 50 countries including Canada. Pelican has six manufacturing plants, six distribution centers and sales offices around the globe, including Canada. Pelican Products provides multilingual product packaging and sales staff, international power supplies, specification data in English and metric measurements, and strong packaging for export shipping. Pelican Canada ULC, the Pelican Products Canada office is located in Edmonton.

International Lease Finance Corporation

International Lease Finance Corporation (ILFC) began operating in 1973 and focuses on the leasing and sales of aircraft to airlines around the world. ILFC has leased or sold aircraft to several airlines/customers in Canada including: *Air Canada*, *Westjet Airlines*, *Air Transit A.T. Inc.*, and *Sunwing Airlines*.

Key Canadian Companies Present in Los Angeles County

Circle K (Alimentation Couche-Tard Inc.)

Circle K has over 3,300 convenience stores in the U.S. and over 4,000 international locations. It is the largest company-owned convenience-store chain in the U.S. Circle K was established in 1951 in El Paso, Texas. In 2003 Canadian-based Alimentation Couche-Tard acquired Circle K from ConocoPhillips. There are nearly 30 Circle K establishments in Los Angeles County.



Lionsgate Entertainment

Lionsgate Entertainment Corporation is one of the leading independent filmed entertainment studios. Lionsgate is one of those companies that truly has a Canadian-Los Angeles connection as the company was founded in Vancouver, British Columbia and is now headquartered in Santa Monica. The company has established a presence in motion pictures, television programming, home entertainment, family entertainment, video-on demand and digital distribution of content. Lionsgate has become the most commercially successful independent film and television distribution company in North America. Most recently, Lionsgate sold their subsidiary Maple Pictures (Lionsgate Canadian film distributor) to film distributor Alliance Films, which is based in Montreal.

Lionsgate has four main divisions including:

- Lionsgate Films
- Lionsgate Home Entertainment
- Lionsgate Music & Publishing
- Lionsgate Television



John Hancock Life Insurance

John Hancock is a division of Canadian-based financial services group Manulife Financial. Manulife Financial is based in Toronto and has over 26,000 employees in Asia, Canada, and the U.S. John Hancock is one of the largest life insurers in the U.S. and offers individual life insurance, long-term care insurance, mutual funds, 401(k) retirement savings plans, annuities, and 529 college savings plans. The company's products are distributed through licensed financial advisors and through the John Hancock Financial Network. John Hancock Life Insurance has multiple locations throughout Los Angeles County.

Thomson Reuters

Thomson Reuters is a product of Thomson Corporation acquiring Reuters Group in 2008. The company provides business data to leading decision makers in financial, legal, tax and accounting, healthcare, science and media markets. The company has two main divisions including professional and markets. The Thomson family of Canada owns a majority stake in the firm. The Thomson Corporation was founded by Roy Thomson in 1934 in Ontario. Thomson Reuters is present in Burbank, El Segundo, and Glendale and other locations throughout Los Angeles County.

COM DEV International

COM DEV is a company that designs and manufactures space hardware subsystems. The company's products are used in communications, space science, remote sensing, and military satellites. COM DEV is headquartered in Cambridge, Ontario and has operations in El Segundo.

Aldo Group

The Aldo Group is a privately-held company based out of Montreal that operates over 1,000 retail stores in Canada, the U.S., the UK, and Ireland as well as in 60 franchised countries. Aldo specializes in footwear, leather goods and accessories. Aldo has multiple retail stores throughout Los Angeles County.

RBC Wealth Management

Royal Bank of Canada (RBC) is Canada's largest bank by assets and market capitalization. RBC is headquartered in Toronto and operates in 53 countries. RBC has five business segments including Canadian banking, Wealth Management, Insurance, International Banking, and Capital Markets. RBC Wealth Management is Canada's largest wealth manager and operates

in the U.S. RBC Wealth Management in the U.S. focuses on individual investors and small businesses. RBC Wealth Management has locations in Beverly Hills, Long Beach and in other locations in Los Angeles County.

The Stronach Group (Magna Entertainment)

The Stronach Group is a gambling and horse racing company based in Aurora, Ontario. The company owns a number of development properties and real estate assets in North American and Europe. In 2011, the Stronach Group entered into the horse racing industry by acquiring Magna Entertainment Corporation's former holdings from MI Developments. One of the racing assets purchased by the Stronach Group includes Santa Anita Park in Los Angeles County.

Bombardier

Bombardier is one of the largest global aerospace and transportation companies. The company is headquartered in Montreal and its operations are divided into two main divisions, Aerospace and Transportation. Bombardier is the only company in the world that manufactures both airplanes and trains.

Bombardier is present in more than 60 countries and has 70,000 employees. The company has a very significant presence in the U.S. as it has 37 facilities and employs more than 7,000 people. Both Bombardier Aerospace (Los Angeles) and Bombardier Transportation (Lawndale) are present in Los Angeles County.

Air Canada

Air Canada is the largest airline in Canada. It is the largest provider of passenger services in the Canadian market, the Canada-U.S. market and in the international market to and from Canada. Air Canada offers direct service to more than 175 destinations on five continents. The airline carried more than 33 million passengers in 2011 and is a founding member of Star Alliance. Air Canada is the 15th largest airline in the world and employs 26,000 people. The company is headquartered in Montreal and its largest hub is Toronto Pearson International Airport. Air Canada has an office in Los Angeles.

IMAX Corporation

IMAX Corporation is one of the leading entertainment companies in the world. The company was founded in Montreal in 1968 and now has operations in Toronto, New York, and Los Angeles. IMAX Corporation designs and manufactures IMAX cameras and projections systems. It also focuses on film development,



Key Canadian Companies Present in Los Angeles County (continued)

production, post production and distribution to IMAX theatres around the world. There are 643 IMAX theaters in 52 countries. IMAX is the owner of 3D entertainment.

Cirque du Soleil

Cirque du Soleil is a Canadian entertainment company headquartered in Montreal. The dramatic mix of circus arts and street entertainment was founded in 1984 by two street performers, Guy Laliberte and Gilles Ste-Croix. Cirque du Soleil has a solid presence in Los Angeles County as it has been at the DOLBY Theatre in Hollywood with IRIS, a Journey Through the World of Cinema and tours of OVO, TOTEM, Michael Jackson THE IMMORTAL World Tour and Dralion have made stops in Los Angeles, Long Beach, and Santa Monica.

Stantec

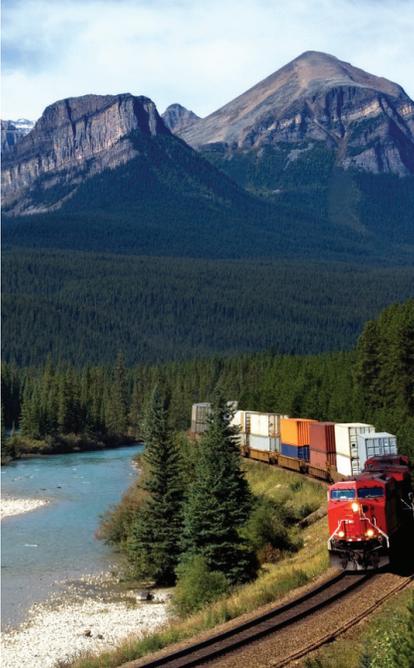
Stantec is a professional consulting services company that specializes in planning, engineering, architecture, interior design, landscape architecture, surveying, environmental sciences, project management, and project economics for infrastructure and facilities projects. Stantec has 12,000 employees working in more than 190 locations in Canada, the U.S., the UK, the United Arab Emirates, and India. The company is headquartered in Edmonton, Alberta and has operations in Long Beach and Woodland Hills.



SPECIAL PROFILE

Quebec-California/Los Angeles Connections

- **2011 Quebec** - California two-way trade total: \$2.3 billion
- **THQ** – based in Los Angeles County, one of the world leaders in video games, has established itself in Quebec and opening an office in Montreal
- **CGI**, a full services IT services provider from Quebec City has over 25 years of experience working with the State of California and has developed a deep understanding of the state's policies, practices and systems. As a full-service systems integrator and managed services provider, CGI has served the needs of many top state and municipal agencies, including the City and County of Los Angeles.



SECTION SIX

Opportunities and Resources

Opportunities for Trade and Investment

The Canadian and Los Angeles County economies are extremely diversified and both economies are heavily focused on trade and investing in key industries of the future. These include clean technologies, renewable energy, information technology (IT) and digital media, aerospace, life sciences, and water treatment. Many linkages due exist between our regional economy and Canada’s economy.

Clean Tech and Renewable Energy

“The Greening of the Los Angeles Economy” – 2011 Report

Prepared by the LAEDC

Why L.A. County should be at the forefront of the greening of the global economy:

- With a population of nearly 10 million, Los Angeles County presents a large market for green goods and services and, by itself, can create enough demand to influence greening trends.
- The L.A. region’s general prosperity means that it is better positioned than many emerging economies to afford the often more expensive up-front costs associated with greening.
- The state of California places a high priority on “greening” relative to other regions. Several pieces of legislation, executive orders, and administrative rules from the past six years convey the State’s commitment to greening the economy (e.g., Assembly Bill 32/AB 32, AB 811, AB 474, AB 939, and the Renewables Portfolio Standard, etc.).
- There is a broad commitment to green policies in the state as Californians have consistently supported efforts to clean up and protect the environment. Likewise, business leaders have typically shared those commitments and/or pursued greening for the potential cost savings.
- Key public and private sector leaders have identified the greening of the economy as a source of current and future employment.
- The breadth of Los Angeles County’s economy and its established role as an international trade hub ensures that just about every developing green trend will be relevant here.



Clean Tech and Renewable Energy (continued)

With abundant sunshine and other natural resources, **Los Angeles County** and the rest of Southern California are making huge strides in developing and utilizing renewable energy while promoting clean technology both among businesses and households.

As a part of the region's effort to reduce pollution, the region's public utilities rely on "clean" energy sources for power generation, while at the same time creating incentives for utility customers to reduce their energy consumption through conservation and increased reliance on solutions that promote efficient energy use, such as energy-efficient appliances low-wattage lighting in the home, and a wide variety of efficiency measures in business.

The Southern California region is a hotbed for venture capital of all types, ranking third among the regions of the United States for venture funds received in 2010 and 2011, based on research from Ernst & Young.

Clean sources of power mainly include solar and wind. In addition, public utilities and the state have offered financial incentives for homeowners and businesses to encourage the installation and use of solar power.

The Southern California region is a hotbed for venture capital of all types, ranking third among the regions of the United States for venture funds received in 2010 and 2011, based on research from Ernst & Young.

California as a whole attracted \$2.8 billion in clean tech venture capital last year, 57% of the nationwide total. While Southern California received about a quarter of that total, it holds great potential going forward as utilities, employers, and government agencies turn increasingly to clean tech as a part of a regional effort to reduce pollution and conserve energy. In particular, the Ports of Los Angeles and Long Beach have implemented the San Pedro Bay Ports Clean Air Action Plan, the most comprehensive strategy to cut air pollution and reduce health risks ever produced for a global seaport complex. The ports have agreed to reduce pollution by at least 45 percent within five years. In addition, the ports are investing \$5.5 billion to upgrade and green the ports infrastructure. The two ports have been leaders in environmental remediation and are the greenest ports in the world.

The **Canadian clean technology sector** is comprised of renewable energy and environmental sub-sectors. Over 95% of Canada's clean tech companies are small to medium sized companies. In addition, Canada has abundant solar energy resources, with the largest resources being found in Southern Ontario, Quebec and the prairies. Canada's geothermal energy potential is estimated to be over 5,000 megawatts in shallow geothermal resources. Upwards of 10,000 megawatts or more may be available in deep geothermal resources, which require enhanced geothermal systems, a technology under development. The largest industry presence is in Ontario where the large majority of wind and solar energy firms are located. Ontario's clean energy policies have created 20,000 jobs and are on the way to creating 50,000 jobs through investments in renewable energy and conservation, smart grid technology, and transmission and distribution upgrades. Wind and solar power produced more electricity than coal in Ontario in 2011. As of mid-2011, Canada's installed wind energy capacity was 4,588 megawatts, which is enough to power one million homes. In fact, Ontario possesses the 10 largest solar farms in Canada and is the leading solar energy producer in the country. By the end of 2014, Ontario will be the first province or state in North America to replace coal-fired generation with cleaner sources of power.

Canada is recognized as a global leader in the hydrogen and fuel cell industry. By 2020, the hydrogen and fuel cell sector is expected to create 14,500 jobs and achieve revenues of C\$1.2 billion. British Columbia possesses the large majority of hydrogen fuel cell companies.

Quebec, Alberta, Manitoba, Saskatchewan, and the Atlantic Coast of Canada are where the other clusters are present. These clusters include bio-energy, waste-to-energy, air pollution remediation, bio-fuels, nuclear, solid waste, green building, geothermal, and tidal energy. Nearly 75% of Canada's electricity comes from clean sources including hydro, nuclear, wind, solar, waste-to-energy, and bio-fuels.

Canada ranks third in the world for hydroelectricity generation. This renewable resource makes up over 60% of Canada's total electricity generation. The Canadian renewable fuels industry has invested over C\$2 billion towards the construction of new production facilities across the country generating almost 540 million gallons per year of domestic production capacity.



Digital Media

Data for employment in the **Los Angeles County** digital media industry are incomplete, which is unfortunate given its potential to impact all sectors of the creative economy. A large number of software programmers (perhaps as high as 70%) are independent contractors who are not captured by the traditional data sources. Many also work for firms in other industries. Looking just at software publishers there were 53 major video game producers in Los Angeles and Orange counties in 2011. Over two dozen game developers have roots and facilities in Southern California. About a dozen other firms are headquartered elsewhere but have development facilities in the Southern California region.

Individuals working in digital media may also be employed by architectural firms creating 3D images of building designs or in the fashion industry engaged in high-tech printing of digital designs on fabrics. Others work for advertising agencies and computer systems design firms and independent specialized design companies. Additionally, with the growth of digital media in entertainment, more and more digital artists are moving onto the payrolls of the film studios.

In Los Angeles County, there were 5,300 persons directly engaged in software publishing during 2010, and sector revenues were \$4.1 billion. The total economic impact proved to be impressive: 18,900 total jobs and total economic output of \$6.8 billion. Orange County had 4,500 people working directly in this sector in 2010, and sales of \$3.4 billion. Again, the total economic impact was large: 16,900 total jobs and economic output of \$5.6 billion.

Software publishing accounts for about a quarter of the employment in Los Angeles County's information technology cluster. Jobs in this sector have registered modest growth in recent years, in part because of the synergies created by the nexus of entertainment, media, and technology in the region.

In addition, Los Angeles County has seen roughly 600 start-ups established over the past few years. Also, there are 15 accelerators and 27 incubators supporting the creation of these start-ups. Many of these tech companies are located in an area that has been designated as "Silicon Beach", a three-mile stretch from Venice to Santa Monica.

A significant number of the world's leading digital media firms are in **Canada**. The Canadian interactive media sector represents roughly 3,000 companies, which employ more than 52,000 people. The IT and digital media clusters are mainly in the Toronto metro area.

The estimated revenue from interactive digital media projects in Canada is nearly \$4 billion (C\$). For decades now, Canada has attracted some of the world's largest digital media companies. Recent investments include Warner Bros. Interactive Entertainment, Capcom Interactive Canada, Pixar Animation Studios, and Digital Domain.

Canadian digital gaming generates approximately C\$2 billion in revenues, employs roughly 14,000 people and was ranked third in the world in terms of revenues, after the U.S. and Japan. In 2010, Canadian studios such as Matt Rix, Hemisphere Games, Relic, and Chaotic Box were on Develop 100's list of top 100 most successful games development studios.

Canadian digital gaming generates approximately C\$2 billion in revenues, employs roughly 14,000 people and was ranked third in the world in terms of revenues, after the U.S. and Japan.

Canada's wealth of talent has generated world-class business software in a variety of industries and vertical markets. The software industry is a cornerstone of Canada's Information and Communications Technology (ICT) sector. In 2011, Canada's ICT sector employed an estimated 545,000 people, and half of these jobs were in software development. Companies produce world-leading software in Canada in various fields including business intelligence (IBM-Cognos and Business Objects-SAP), enterprise content management (Open Text Corporation), and supply chain management (Descartes and TECSYS).

Canada is a leading wireless research and development hub. These companies are leading global players in areas such as WiFi, mesh networks, WiMAX, RFID, UWB, SDR as well as broadband, satellite, and fibre-optics applications. Swedish manufacturer Ericsson selected Canada as the site of its largest R&D and services center outside of Sweden.

Aerospace

Aerospace is an extremely vital component of the regional economy. Southern California's aerospace firms continue to provide a significant number of high-paying jobs and are an important incubator for technological innovation. There is a large base of subcontracting firms that produce everything from fasteners to aircraft seating and in-flight entertainment



Aerospace (continued)

systems to 747 fuselage panels. The local aircraft industry mainly consists of subcontractors who manufacture parts and assemblies for a variety of aircraft, although final assembly of some aircraft still take place here, notably the Boeing C-17 and the Northrop Grumman Global Hawk unmanned vehicle.

Modern aircraft have become amazingly complex and require millions of individual parts as well as support systems to operate and maintain these vehicles. A significant proportion of aerospace electronic components and other parts for air and spacecraft are also produced in Southern California. Southern California's aerospace industry is also a beneficiary of the growing importance of information in modern warfare systems (i.e. the rapid transfer of information between military units in the air, on the ground and at sea). The region's strong information technology base is attracting new opportunities for this growing segment of the industry.

Canada has the fifth largest aerospace industry in the world, behind only the U.S., the U.K., France and Germany. There are more than 400 aerospace manufacturing and services

With annual R&D and capital investment of more than \$1.5 billion (C\$) in this sector, Canada is at the forefront of aircraft technology development and applications.

companies across the country. Overall, the aerospace sector generated annual revenues of C\$21 billion in 2010. These firms employ over 80,000 people across the country. Among these companies, Bombardier is a global leader in the regional and business aircraft market. In fact, Bombardier has operations in Los Angeles County including an authorized service and line maintenance facility location. Global Original Equipment Manufacturers (OEMs) and Tier-1 suppliers such as Boeing Co.,

Pratt & Whitney, General Dynamics Corporation, Lockheed Martin Corporation and the Rolls-Royce Group all have operations in Canada. The Canadian aerospace sector exported products and services valued at C\$15.3 billion in 2010, which amounted to 73% of all sector revenues. Total sales to the U.S. totaled C\$9.2 billion in 2010.

With annual R&D and capital investment of more than \$1.5 billion (C\$) in this sector, Canada is at the forefront of aircraft technology development and applications. The Canadian

federal government's Strategic Aerospace and Defence Initiative (SADI) aims to increase the level of investment by providing repayable contributions of up to 30% of eligible costs in support of R&D by Canadian aerospace, defence, space and security industries.

The areas where Canadian firms are strongest include aviation, engines/engine parts, repair and maintenance, simulation and training and space technology. The aerospace industry cluster is predominantly located in Quebec, Ontario, Manitoba, British Columbia, and Nova Scotia.

With its highly skilled workforce and integrated supply chains, Canada's aerospace industry supplies 33% of global demand for small gas-turbine engines and enjoys a 70% global market share for visual simulators. According to an RNCOS research report published in March 2011, Canada's aerospace market has experienced one of the world's fastest growth rates during the last few years.

Life Sciences

Los Angeles County and Southern California have a large health care infrastructure to serve its population, including medical offices, clinics, hospitals, and medical centers, including research hospitals with ties to area medical schools at UCLA, USC, University of California, Irvine, and other prominent medical schools.

The proximity of a large population and medical schools has spawned a thriving biomedical industry cluster consisting of biopharmaceutical and medical device companies, among them Amgen, Baxter International, Allergan, and Edwards Life Sciences. A recent Jones Lang LaSalle study ranked the Los Angeles area life sciences cluster fourth in the nation, based on the size of the medical industry, the presence of academic research facilities, and the region's capture of funding from various sources.

Canada has the third largest life sciences industry cluster in the world based on number of firms and total employment. The Canadian life sciences industry cluster includes over 2,000 companies with a research community of over 100 institutes and 30,000 scientists. In addition, the life sciences cluster employs roughly 16,000 people across much of the country. In fact, Ontario and Quebec have the largest number of firms and employees. Ontario has 220 companies with approximately 6,000 employees and annually spends roughly C\$650 million in research & development. The



province of Quebec has 240 companies with a total of 5,500 employees and annually spends C\$600 million in research & development. Also, British Columbia has a sizeable presence as well with 110 companies with a total of 2,500 employees and annually spends C\$300 million in research and development. The cities of Toronto, Montreal, and Vancouver rank among the top 10 cities in North America for life sciences patent filings. Finally, Canada has over 28 Centers of Excellence that provide integrated research and collaboration between academic institutions, industry, and government.

Canada has a C\$7 billion medical devices industry making it one of the largest in the world. The medical devices industry is comprised of over 1,000 companies and it employs over 25,000 people mainly in Ontario, Quebec, and British Columbia. In fact, the cities of Toronto and Montreal have a substantial medical technology industry cluster, which leverages the world-class universities, research institutes, and hospitals. Exports have reached over C\$2.5 billion in recent years with the majority of those entering the U.S. The Canadian medical devices industry specializes in the development and manufacturing of cardiovascular devices, medical imaging, in vitro diagnostics, dental materials, prosthetics, and home care products. In 2010, a KPMG competitiveness report cited Canada as having the lowest costs for establishing and operating a medical device manufacturing facility amongst the G-7 nations.

Water and Water Treatment

Although **Southern California** is a semi-desert climate, it supports the largest metropolitan population in the country as well as agriculture and other industry sectors that require access to reliable supplies of fresh water. Fresh water comes from three main sources: the State Water Project which delivers water to the region via the California Aqueduct; the Colorado River; and underground aquifers. While a significant portion of the areas freshwater needs are met by local underground aquifers, it must rely on imported water to sustain its population and economy.

The Southern California region depends on a cost-effective, environmentally-friendly, safe, and reliable source of water. There is great demand for water treatment solutions in the Southern California region, particularly in Los Angeles County. Water plays a very substantial role in economic

development and the future of California's and Los Angeles County's economic prosperity will be ultimately impacted by what happens with our supply of water.

Canada has 20% of the world's fresh water and has established itself as one of the global leaders in water treatment. Canada excels in the development of water treatment technologies in ultra-violet disinfection and membrane filtration techniques. The main clusters are in Quebec, Waterloo (Ontario) and Vancouver (British Columbia).

UV Pure of Toronto, Ontario which is one of the leaders in next generation Ultra-violet (UV) technology has been awarded contracts in California, New York, Ohio and Wisconsin. In addition, another Ontario based firm manufactured the world's largest installed base of UV systems in operation. The firm was acquired by U.S. based Danaher Corporation back in 2004. Also, Canada is home to the world's first and only venture capital firm (XPV Capital) that invests in water technologies.

Los Angeles County Trade and Investment Organizations

World Trade Center Association Los Angeles-Long Beach (WTCA-LA LB)

The World Trade Center Association Los Angeles–Long Beach (WTCA LA-LB) pursues trade facilitation and investment attraction for the Los Angeles region. The WTCA LA-LB works to support the development of international trade and business opportunities for Southern California companies. The WTCA LA-LB also promotes Los Angeles County as a destination for foreign investment to a targeted international audience in order to attract investment into the region.

Los Angeles County Economic Development Corporation (LAEDC)

Founded in 1981, the LAEDC was created by the Los Angeles County Board of Supervisors to implement L.A. County's economic development program through land development, project financing and marketing activities. During its history, the LAEDC has evolved from being a facilitator of the County's industrial bond development program to being Southern California's premier economic development organization. The mission of the LAEDC is to attract, retain and grow businesses and jobs for the regions of L.A. County.



Los Angeles County Trade and Investment Organizations (continued)

The LAEDC's award-winning Business Assistance Program (BAP) offers free, confidential assistance to business owners, decision makers and their advisors. Through local offices across the County, the BAP team can provide comprehensive analysis of business opportunities starting with initial site selection. Since 1996, the LAEDC's BAP team has helped attract or retain nearly 180,000 annual jobs in Los Angeles County with an estimated labor income, including wages and benefits, of nearly \$11 million.

U.S. Department of Commerce – U.S. Commercial Service – Downtown & West Los Angeles U.S. Export Assistance Centers

The U.S. Commercial Service of the U.S. Department of Commerce is a federal government agency whose main mission is to help small-to-medium sized Los Angeles manufacturing and service companies develop international markets. The experienced staff of International Trade Specialists focuses on identifying and evaluating international partners, developing market entry strategies, overcoming exporting challenges and navigating other export-related issues. The Downtown & West Los Angeles U.S. Commercial Service/Export Assistance Centers (co-located with the LAEDC) are part of an international network of 1,700 international trade specialists throughout the world, with 165 offices in 82 countries. The Department of Commerce's new initiative SelectUSA was created at the federal level to showcase the United States as the world's premier business location and to provide easy access to federal-level programs and services related to business investment. SelectUSA is designed to complement the activities of our states—the primary drivers of economic development in the United States.

Los Angeles Area Chamber of Commerce – Global Initiatives

The Los Angeles Area Chamber of Commerce through its Global Initiatives programs works to move global trade forward in the Los Angeles region, assisting local businesses to increase their global reach by establishing relationships abroad.

Los Angeles Regional Export Council (LARExC)

L.A. City Mayor Antonio Villaraigosa launched the Los Angeles Regional Export Council in 2011. The Regional Export Council is a public-private partnership that includes government, business, and academic institutions. The Regional Export Council will help local businesses reach global markets by creating a single entry point for companies and will create a one-stop export web resource. The LA Regional Export Council works directly with the Canadian Consulate in Los Angeles.

District Export Council of Southern California (DEC-SOCAL)

The District Export Council of Southern California provides assistance to local companies on how to export. The DES-SOCAL organizes and sponsors export-related events and workshops throughout Southern California so local companies can gain the necessary knowledge on how to export their products and services.

Foreign Trade Association of Southern California (FTA)

The Foreign Trade Association of Southern California (FTA) was established in 1919 in order to promote international business and support economic growth in Southern California and worldwide.

California Centers for International Trade Development (CITD)

The California Centers for International Trade Development helps companies learn how to expand internationally, through matchmaking events, exporter and importer assistance, education, consulting, market research, and training. The CITD has three centers servicing Los Angeles County with offices in Santa Ana, Hawthorne, and Long Beach.



Canadian Government, Trade, and Investment Organizations in Los Angeles County

The Consulate General of Canada in Los Angeles

The Consulate General of Canada in Los Angeles is responsible for representing Canada’s commercial and diplomatic interests in the Southwest United States (including Southern California, Arizona and Nevada), in addition to providing consular and immigration services. The Consulate General promotes trade and investment as well as partnerships between local stakeholders and Canadian counterparts in a diversity of areas, such as business and finance, science and technology, public policy, education, and culture.

For more information regarding these services, as well as additional information regarding Canada’s foreign policy, general economic, trade, and investment data, and activities in the Southern California region, please visit the Consulate General’s official website: www.losangeles.gc.ca.

Quebec Government Office in Los Angeles

The Quebec Government Office was established in 1970 in Los Angeles. Its main objective is to promote the interests of Quebec in 13 states including Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, and Wyoming. The Head of Post in the Los Angeles office is Alain Houde. The Los Angeles office focuses on business development, investment (mainly focusing on aerospace, energy, agrifood, environment, biotech, ICT, lumber and construction, and transportation), government institutions, education, and culture and public affairs.

Ontario International Marketing Center in Los Angeles

The Government of Ontario has created a network of International Marketing Centers (Centres) in key strategic locations globally through the Ontario Ministry of Economic Development and Innovation. These International Marketing Centers work to increase trade and investment in Ontario. The main duties of the Marketing Centers are to attract FDI into Ontario, promote awareness of, and access to, Ontario-produced goods and services, build strong, strategic relationships with the media and local governments,

network to raise Ontario’s profile as a world-class business jurisdiction, and obtain and disseminate timely commercial intelligence in key markets.

The Marketing Center in Los Angeles is located in the Canadian Consulate General offices in Downtown Los Angeles. The Senior Economic Officer of the Marketing Center is Ms. Shirley Townsend.

Canadian – National, Provincial, and Territorial Investment Organizations

- **Canada:** <http://investcanada.gc.ca>
- **Alberta:** www.albertacanada.com
- **British Columbia:** www.trade.britishcolumbia.ca
- **Manitoba:** www.investmanitoba.ca
- **New Brunswick:** www.gnb.ca/0398/investment/
- **Newfoundland and Labrador:** www.nlbusiness.ca
- **Northwest Territories:** www.iti.gov.nt.ca
- **Nova Scotia:** www.novascotiabusiness.com
- **Nunavut:** www.edt.gov.nu.ca
- **Ontario:** www.investontario.ca
- **Prince Edward Island:** www.investpei.com
- **Quebec:** www.investquebec.com
- **Saskatchewan:** www.enterprisesaskatchewan.ca
- **Yukon:** www.investyukon.com



SECTION SEVEN

Other Ties

PERSONAL TIES

Educational Ties

With the wealth of highly regarded universities and colleges in both Canada and the Los Angeles area and the extensive research opportunities cross-border, Canadians have come to Los Angeles to study and do graduate research and Americans have pursued degrees in Canada, in particular in Vancouver, Toronto, and Montreal.

Few places in the world offer as rich an academic climate as Los Angeles County. It is home to three world-class research universities, Caltech, USC and UCLA, as well as dozens of other outstanding institutions. Each year, these schools graduate tens of thousands of students. By providing the right combination of educational curriculum, experienced faculty, and a broad selection of universities, L.A. County is the number one choice for higher learning for international students (numbering over 20,000). In fact, the LAEDC estimates that close to 1,000 students from Canada are currently studying at Los Angeles County universities.

In the 2010-2011 academic year, 27,546 Canadian students enrolled in universities in the U.S. Over the years, this has been extremely helpful for the U.S. economy and for U.S.-Canadian relations. The Department of Commerce estimates that foreign students spend almost \$20 billion a year on higher education expenses in the United States and roughly \$3 billion a year in California. Canadian students alone spent \$925 million in 2010. The current economic impact of students' spending includes tuition, fees and living expenses. Future benefits arise if alumni decide to work and live in the U.S. Also, there were 1,750 American students going to Canada for study abroad in 2010.



University of Southern California (USC)

Of all the universities in the U.S., the University of Southern California (USC) has enrolled the most international students for ten consecutive years. In the Academic Year (AY) 2010-2011, USC hosted 8,615 international students out of a total student body of over 33,000 students. The number of Canadian students enrolled at USC for AY 2011-2012 was 316.

Dr. Patrick James is a Professor of International Relations at USC and also the Director of the Center for International Studies. He is the former President of the Association for Canadian Studies in the U.S. and is the President of the International Council for Canadian Studies where he will serve until 2013.

University of California, Los Angeles (UCLA)

UCLA is another global academic institution located in the City of Los Angeles. In AY 2010-2011, UCLA ranked #6 in the nation in international student enrollment, with a total of 6,249 students. The number of Canadian students enrolled at UCLA for AY 2011-2012 was 309. The Dean of the UCLA School of Public Affairs (Frank Gillam) is Canadian.

UCLA's Canadian Studies program was established in 2001 and was part of the School of Public Affairs. The goal of the Canadian Studies program has always been to provide a better understanding of Canada and its overall relationship with the U.S. The program focuses on issues that are of mutual concern among students, faculty, and the public. As of June 2012, the Canadian Studies program moved to the Institute of the Environment and Sustainability (IoES). The program is now in partnership with the International Institute and receives support from the Canadian Consulate.

Caltech (Jet Propulsion Laboratory)

Canadian universities have an ongoing partnership with the California Institute of Technology (CalTech) in astronomy. They have partnered with Caltech to build the world's largest precise telescope in Chile and the world's most advanced telescope (TMT) in Hawaii. In addition, Caltech and the Canadian Space Agency are jointly developing the Mars Atmospheric Trace Molecule Occultation Spectrometer (MATMOS) instrument which will be aboard the ExoMars Trace Gas Orbiter when it launches in 2016.

Other Educational Ties

There are many Canadian professors at universities and colleges in the Los Angeles area. Canadian Judge Allen Linden is a professor at Pepperdine University. There are four Canada-U.S. Fulbright Visiting Research Chairs in Los Angeles that provide opportunities for Canadian scholars to teach and do research in Los Angeles. USC has two - one at the School of Public Diplomacy and a new one at USC's School of Social Work and UCLA is pioneering two new Chairs at California's Nanosystems Institute. Lt.-Gen. Roméo Dallaire, who commanded the United Nations Assistance Mission for Rwanda (UNAMIR), will be teaching at the University of Southern California on a Fulbright Fellowship in September 2013. He received an honorary degree from USC in May 2012.

The Canadian Consulate in Los Angeles, the Canadian Forces and USC partnered together in January 2011 to deliver a symposium entitled "Wounded Warriors: Healing the Mind, Body, and Soul", highlighting the Canada-US defense cooperation relationship, illustrated by our collaboration on innovative approaches and best practices in wounded warrior care.

POLITICAL TIES

The City of Los Angeles has had two Canadian-born Mayors during its history, both natives of Quebec. Prudent Beaudry served as the 13th mayor, from 1874 to 1876. Damien Marchesseault served as the seventh mayor from May 1859 to May 1860 and again from 1861 to 1865. In addition, Kim Campbell, the 13th Prime Minister of Canada, served as the Consul General of Canada in Los Angeles from 1996-2000.

CANADIAN ENTERTAINMENT TIES

- Jack Warner, co-founder of Warner Studios
- Mary Pickford, film icon and "America's sweetheart"
- Arthur Hiller, President of the Academy of Motion Picture Arts and Sciences and the recipient of the Jean Hersholdt Award from the Academy of Motion Picture Arts and Sciences
- The Bronfman family (briefly owned Universal Studios)



CANADIAN ENTERTAINMENT TIES

(continued)

- Jack Kent Cook, builder of the Los Angeles Forum, former owner of the Los Angeles Lakers, Los Angeles Kings and Los Angeles Daily News
- Louis B. Mayer, co-founder of Metro-Goldwyn-Mayer Studios
- Monty Hall, “Let’s Make a Deal” host who has also raised over \$1 billion for Children’s Variety charities in the US and Canada
- Norman Jewison, Director, Irving Thalberg Award recipient from the Academy of Motion Picture Arts and Sciences
- Ivan Reitman, Director, Producer, “Meatballs”, “Stripes”, “Ghostbusters”
- James Cameron, Director, “True Lies”, “The Terminator”, “Aliens”, “Titanic”

CULTURAL TIES

Canada and the Los Angeles region are linked in many ways. In addition to the educational ties, the personal connections between the two regions include many cultural ties.

Canadians Abroad

Canadians Abroad is the largest Canadian expat organization in Southern California with over 3,500 members. It is dedicated to connecting Canadians and Americans in Southern California. Canadians Abroad engages with both the private and public sectors in order to strengthen Canada-U.S. ties in Southern California. The Chairman of the organization is Alan Thicke and the co-Presidents are David Ivkovic and John Tishbi.

Association des Quebecois a Los Angeles

The association is a non-profit organization that promotes French-Canadian culture in Los Angeles. In particular, the association focuses on the French-Canadian culture of Quebec. They hold multiple events throughout the year in order to educate the public about French-Canadian customs and traditions.

Sister Cities

The following is a list of Canadian Sister Cities with Los Angeles County Cities:

- City of Los Angeles - Vancouver, British Columbia
- Culver City - Lethbridge, Alberta

iPalpiti Festival of International Laureates at Disney Hall

The iPalpiti Arts International is a non-profit organization based in Los Angeles that develops the careers of talented young musicians. The Festival of International Laureates took place at the Disney Concert Hall in Downtown L.A. in 2012 and three Canadians were featured at the event.

L.A. City Bike Path and Carmanah Solar Powered Lighting

The L.A. River bike path which runs for four miles along the L.A. river has solar powered lights that were developed by Carmanah Technologies. The company is based in Victoria, British Columbia and specializes self-contained solar LED lighting.

Discover Los Angeles

The Los Angeles Convention and Visitors Bureau is a non-profit business association with sales and marketing offices throughout the U.S. In addition, Discover Los Angeles has international marketing offices in alliance with Los Angeles World Airports (LAWA). Discover Los Angeles represents Los Angeles as a destination to the convention industry, domestic and international travelers, the cruise industry, and the worldwide travel media industry.

NETWORK TIES (Organizations and Associations)

Canada California Business Council

The Canada California Business Council was established in 2009 and its main objective is to connect Canadian and California businesses. The Council attempts to connect bi-lateral business opportunities that will increase FDI between Canada and California and increase two-way trade. The Council has offices in Los Angeles, Toronto, and in Vancouver.



Canadian-American Bar Association

The Canadian American Bar Association is an association of Canadian and American lawyers that promotes cross-border bar association.



SPECIAL PROFILE

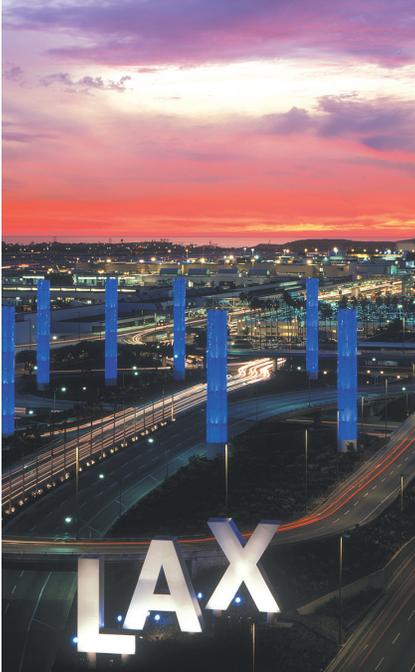
Stem Cell Project between UCLA and the University of Toronto

The project will be led by Dr. Tak Mak, Professor at University of Toronto's Department of Medical Biophysics and Dr. Dennis Slamon of UCLA. Their work will utilize a pipeline strategy to develop novel drugs targeting cancer-initiating cells in solid tumour cancers.

The funding comes through a collaborative partnership between the Cancer Stem Cell Consortium and the California Institute for Regenerative Medicine.

Please refer to the following link:

http://www.uhn.ca/applications/iNews/ViewStory.aspx?s_id=369



SECTION EIGHT

What Lies Ahead

Key Advantages to Investing in Los Angeles County



- A huge consumer market (highest population of any county in the U.S.) and if it were a state, Los Angeles County would have the 8th largest population in the U.S.
- Largest economy of any county in the U.S. and the 21st largest economy in the world with a Gross Regional Product estimated at \$558 billion
- A well-educated and trained workforce of 4.5 million (excellent higher education institutions including Caltech, USC, and UCLA)
- International trade capital of the U.S. (busiest seaports in the nation)
- Outstanding trade infrastructure (ports, railways, freeways, and airports) Excellent access to national and international markets (particularly Developing Asia)
- Technology rich area
- Creative Capital of the U.S. – first-rate apparel, auto, and engineering design, entertainment, fine arts, and arts education
- Manufacturing capital of the U.S.
- Competitive costs
- Great weather all year round

Los Angeles County has the most diversified economic base in the U.S. This broad economic base along with the existing business infrastructure provides the ideal environment to enable profitable returns on Canadian investment.

Key Advantages to Investing in Canada



- The 10th largest economy in the world (based on market exchange rates)
- The 9th highest GDP per capita in the world at over \$50,000
- The lowest overall tax rate on new business investment in the G-7
- The lowest overall business costs in the G-7
- The lowest costs in R&D-intensive sectors in the G-7 (up to 10.7% lower than the U.S.)
- The best place in the G-7 to do business (2011-2015)
- The lowest debt burden in the G-7
- The world's soundest banking system
- The second highest proportion of post-secondary graduates in the OECD
- A strong track record for industry-government-academic collaboration in the pursuit of research and innovation
- The first G-20 country to offer a tariff-free zone for imports of machinery and equipment
- The highest quality of life in the G-7



Key Challenges Ahead

One of the key challenges going forward for Los Angeles County will be retaining its existing base of Canadian companies as other areas are always trying to entice Los Angeles companies to relocate operations. The main objective has to be to deepen the existing relationships with companies and encourage them to stay in Los Angeles County. Los Angeles County has benefitted economically and culturally as many Canadian companies established operations instead of offices and headquarters in the area. Canadian FDI has been a driver in the Los Angeles County economy for decades and will continue to play an instrumental role in the county's economy. It is absolutely essential to realize the importance of keeping these high-wage jobs in Los Angeles County.

Another challenge related to investment involves attracting new foreign direct investment from Canada in the coming years in order to enhance economic development in Los Angeles County. Los Angeles County will be competing for new investment with markets in Asia, Latin America and Africa as well as with other regions of the U.S. (particularly with the Eastern and Midwestern parts of the U.S.). However, Canada should begin to increase investments in California due to its strong economic ties with the state and the state's leadership and focus on the green and high-tech industries of the future. The good news is that Los Angeles County should capture much of that investment due to its strong business ties with Canada. In addition, Los Angeles County is a high-tech and innovative area with a very talented workforce.

Key Opportunities Ahead

The outlook for foreign direct investment from Canada into Los Angeles County continues to be favorable. One of the greatest opportunities for Los Angeles County could be the significant flows of green tech investment arriving from Canada in the coming years. Most importantly, Canadian companies are especially attracted to the Los Angeles area as the county has a large market, a broad economic base and the necessary business infrastructure to enable profitable returns on Canadian investment.

As previously mentioned in the *Investment Ties* Section of this report, the greatest opportunities are in the green/clean tech, renewable energy, entertainment, digital media, aerospace, and medical devices. Near term, investment will most likely occur within solar energy, entertainment, digital media, and aerospace.

Also, another recent development that has evolved over the past couple of years has been the appreciation of the Canadian Dollar and the opportunities that presents for attracting new Canadian investment into Los Angeles County. The rise of the Canadian Dollar created a greater incentive for Canadian companies to move a higher percentage of business operations out of Canada as it has become more expensive to operate domestically. As a result, this has created a good opportunity for Los Angeles County to further attract Canadian investment.

WTCA LA-LB Canada Trade & FDI Strategy

Industry Focus:

- Renewable Energy/Green Infrastructure
- Entertainment
- Media Entertainment Technology
- Aerospace
- Medical Devices

Partners:

- Consulate General of Canada
- Ontario International Marketing Center
- Quebec Government Office in Los Angeles
- U.S. Commercial Service – Select USA – Toronto and Montreal Offices

Program:

- L.A. County Trade and Investment Mission Trip to Toronto and Montreal
- Consult with established Canadian investors - L.A. County and Canada
- Provide local outreach conferences in support of established investors
- Coordinate program with above partners

Likely Nature of Canadian Investment to be Comprised of the Following Functions:

- Retail Outlets
- Distribution
- Sales and Service
- Research and Development
- Manufacturing



Other Significant Opportunities:

- **Climate Change/Global Warming** – Los Angeles County can provide valuable leadership on this subject, leveraging the landmark California Global Warming Solutions Act (AB 32) (the first-in-the-world comprehensive program of regulatory and market mechanisms to achieve real, quantifiable, cost-effective reductions of greenhouse gases). The State of California, Canada and its provinces have forged partnerships to deal with climate change.
- **Banking and Financial Services** – As trade continues to flourish between Canada and California, Canada and Los Angeles County both will experience strong growth in the demand for trade financing.
- **Professional and Business Services** – More investment will come to Los Angeles County from Canada and investment will continue to flow to Canada. International trade and foreign direct investment flows will continue to experience high growth rates. Therefore it is logical to expect more Canadian firms will move into the U.S. and particularly into the Los Angeles area. Canadian firms and Los Angeles County businesses both will require more international legal services, international trade practices, consulting and accounting.
- **Construction and Engineering** – Canada has a highly developed transportation network, including high speed rail, highways, and bridges. L.A. County based construction and engineering firms (AECOM, Parson, Jacobs, and Tetra Tech) will want to continue to participate in this market.
- **Creative Design** – Canada’s affluent consumers have become more style conscious. The L.A. brand is already part of the Canadian fashion scene. Canadian consumer goods manufacturers will want to engage other L.A. designers for other types of products like house wares and home furnishings.
- **Biotechnology** – California and Los Angeles County are at the forefront of biotechnology. Los Angeles County is home to some of the top bio-tech firms in the world and employs more people in the medical devices field than any other county in the U.S.
- **Machinery and Equipment** – Los Angeles County is the number one manufacturing center in the U.S., particularly in hi-tech machinery and equipment. Canada’s expertise ranges from metalworking machinery, oil and gas drilling equipment and agricultural machinery. Also, Canada has key value-chain strengths including machinery and plant design and R&D in advanced materials. Investing in Los Angeles County facilities seems advantageous.



SECTION NINE

Conclusion

The future is bright for the Los Angeles County-Canada relationship. Los Angeles County will continue to play a vital role in the California economy and for that matter in the U.S. and global economies. The future of the American economy is reflected in California as the key green industries of the future are all extremely well positioned in the Golden State. In addition, California and particularly Los Angeles County will undoubtedly lead the nation in its efforts to establish a more export driven economy (*please refer to the Brookings Institution "Exports and the Next Economy" as well as the Global Cities Initiative*). In fact, the L.A. Metro Area's top export market is Canada. The world will continue to look to Canada as a model for financial stability and fiscal prudence. Also, the international community will look to Canadian companies to provide innovative leading-edge technology to propel the global economy forward as Canada is one of the key world leaders in innovation. Together Los Angeles County and Canada can take the lead in innovation and developing new technologies to address pressing global issues such as climate change and renewable energy. Innovation and new technologies will come out of Los Angeles area research universities and Canadian universities and research institutes as both places continue to produce some of the brightest talent in the world. Los Angeles County has been in a position to benefit from Canada's economic strength over the years and continues to be in a good position with regards to specific growth industries of the future such as clean technologies, renewable energy, digital media, aerospace, and water treatment.

However, as important as it is to highlight the future prospects of the relationship, it is also of value to note some improvements that could be made in order to ensure the relationship moves in the right direction. Los Angeles County's future prosperity will be impacted by how well it manages its relations with Canada and the rest of North America. Here are some recommendations for nurturing the existing Los Angeles County-Canada relationship in order to ensure that future ties become even stronger:

- Promote and market Los Angeles County as an extremely attractive location for Canadian foreign direct investment. Emphasize all the elements highlighted within this report to make it very clear why L.A. County provides significant overall value and return on investment. Focus on attracting Canadian companies that are looking to locate their distribution centers, sales and service offices, research and development facilities, manufacturing plants, etc.
- Invest in improving the existing trade infrastructure (Alameda Corridor, local ports, freeways, intermodal rail capacity to distribution centers, other rail capacity and LAX). Implement strategies to ensure that the local ports do not lose market share to other North American ports or in anticipation of the Panama Canal 2014 expansion. The local ports need to dispel all congestion myths, bottleneck issues and business unfriendly perceptions.



Conclusion (continued)

Apply pressure at the local, state and federal levels to adopt policies that support free trade and funding for trade promotion programs via the U.S. Commerce Department.

- Attempt to better leverage the resources of the World Trade Center Association Los Angeles-Long Beach (WTCA LA-LB), the Consulate General of Canada, the Quebec Government Office in Los Angeles, the Ontario International Marketing Center, and other Canadian related organizations to increase the level of interaction between U.S. and Canadian companies. Focus on business development exchanges and foreign direct investment prospects.
- Promote Los Angeles County to Canadian tourists and students. Attempt to attract Canadian high school students via exchange programs; also college students, and graduate students. Develop a marketing campaign to attract more Canadian tourists to Los Angeles County emphasizing all the region has to offer to them. Create cultural activities to strengthen the longstanding ties between Canada and the people of Los Angeles County.
- Continue to improve and modernize LAX to ensure that the region is served by an enviable world-class, aviation gateway, the experience of which actually encourages more visits to the region.
- Establish a presence in Canada for L.A. County through a representative office that will support trade and investment opportunities as well as market L.A. County and its competitive advantages over other North American regions.
- Conduct more events like VerdeXchange in L.A. and Canada to encourage communication and collaboration between the government, education and business communities to address together the grand challenges and market opportunities of the 21st Century.
- Emphasize the great potential that lies in partnering all of the organizations and companies mentioned in this report in order to achieve the fundamental objective of creating new alliances that will lead to growth in two-way trade and investment.



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- The New York Times
- The Financial Times
- Boston Consulting Group
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Section 5 | Business Ties

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- Consulate General of Canada in Los Angeles



Fortune 500 Companies based in Los Angeles County:

- Walt Disney Company, www.disney.com
- Occidental Petroleum, www.oxy.com
- Jacobs Engineering Group, www.jacobs.com
- Reliance Steel and Aluminum, www.rsac.com
- AECOM, www.aecom.com
- Dole Food Company, www.dole.com
- Avery Dennison, www.averydennison.com
- Mattel, www.mattel.com
- CB Richard Ellis, www.cbre.com
- Live Nation Entertainment, www.livenation.com

Los Angeles County Companies Present in Canada:

- Korn/Ferry International, www.kornferry.com
- Parsons, www.parsons.com
- Tetra Tech, www.tetrattech.com
- Princess Cruises, www.princess.com/
- American Apparel, www.americanapparel.net/
- BCBGMAXAZRIA, www.bcbg.com/
- Forever 21, www.forever21.com/
- GUESS, www.guess.com
- 7 for All Mankind, www.7forallmankind.com/
- True Religion, www.truereligionbrandjeans.com/
- Lucky Brand, www.luckybrand.com
- Karen Kane, www.karenkane.com/
- DreamWorks, www.dreamworksanimation.com/
- 20th Century Fox, www.foxmovies.com/
- Universal Pictures, www.universalpictures.com/
- Paramount Pictures, www.paramount.com/
- Sony/Columbia, www.sonypictures.com/
- Warner Brothers, www.warnerbros.com/
- SimEx-Iwerks Entertainment, www.simex-iwerks.com
- Teledyne Technologies, www.teledyne.com
- Robinson Helicopter, www.robinsonheli.com/
- Trojan Battery, www.trojanbattery.com/
- Obagi Medical Products, www.obagi.com/
- Sunrider, www.sunrider.com/
- Nestle U.S.A, www.nestleusa.com/
- Pelican Products, www.pelicanproducts.us/
- International Lease Finance Corporation, www.ilfc.com/

Key Canadian Companies Present in Los Angeles County:

- Circle K (Alimentation Couche-Tard Inc.), www.circleK.com
- Lionsgate Entertainment, www.lionsgate.com
- John Hancock Life Insurance, www.johnhancock.com
- Thomson Reuters, www.thomsonreuters.com
- COM DEV International, www.comdev.ca
- Aldo Group, www.aldoshoes.com

- RBC Wealth Management, www.rbcwealthmanagement.com
- The Stronach Group (Magna Entertainment), www.magnaent.com
- Bombardier, www.bombardier.com
- Air Canada, www.aircanada.com
- IMAX Corporation, www.imax.com
- Cirque du Soleil, www.cirquedusoleil.com
- Stantec, www.stantec.com

Section 6 | Opportunities and Resources

- Consulate General of Canada in Los Angeles
- Government of Ontario
- Government of Quebec
- Invest in Ontario
- Invest in Quebec
- Trade and Invest British Columbia
- RepresentLA.com

Section 7 | Other Ties

Educational Ties

- Institute of International Education, *2011 Open Doors Report*
- U.S. Department of Education
- University of Southern California (USC)
 - Vice Provost's Office for Globalization
 - Center for International Studies
 - Marshall School of Business
- University of California, Los Angeles (UCLA)
 - Office of Analysis and Information Management
 - International Institute
 - International Education Office
 - Office of Media Relations
 - University of California Education Abroad
- Caltech
 - International Student Programs
 - Caltech Alumni Association
- California State University (CSU)
 - Office of Institutional Research
- Consulate General of Canada in Los Angeles

Political, Entertainment, Cultural and Network Ties

- Consulate General of Canada in Los Angeles
- City of Los Angeles, Sister Cities
- Sister Cities in the U.S.
- L.A. Inc.
- Canadians Abroad
- Canada California Business Council
- Association des Quebecois a Los Angeles
- Canadian-American Bar Association
- McGill Alumni Association of Southern California
- Canada-California Strategic Innovation Partnership (CCSIP)

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