

November 2022

Manufacturing

Profile of the sector



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01 Laval at the heart of a dynamic metropolis

Greater Montreal



4.3 million inhabitants with a wealth of talent



Fast access to over **1.5 billion consumers**



11 universities, 60 colleges and 200 research centres



Transportation and logistics infrastructures: airport, port, railway lines, highway network



Operating costs among **the lowest** in major North American cities



Exceptional **quality of life**

02 Why should you choose Laval?

QUALITY OF LIFE

An exceptional location

ACCESSIBILITY

A strategic choice

WORKFORCE CAPABILITY

A growing population and a qualified and diversified labour pool

ECONOMIC DIVERSITY

Sustained growth

A DYNAMIC AND INNOVATIVE ECOSYSTEM

Incubation hubs, innovative approaches and a dynamic knowledge environment

LAVAL ÉCONOMIQUE OFFERS:

Financial programs (tax and financial incentives)

A group of solutions-based experts offering strategic support to businesses

02 Why should you choose Laval?

Laval, the capital of opportunity

3rd

largest city in Quebec

Close to **450,000** inhabitants on 246 km²

A skilled labour pool

71% of Laval residents have a post-secondary qualification

A highly diversified economy that's growing faster than the Quebec average

166,200 jobs in more than

12,900 businesses

3 metro stations

2 commuter train stations and a bus network

5 highways

3 university pavilions

5 colleges

19 vocational training centres

03 An overview of manufacturing

\$2,153M



Gross Domestic Product (GDP)

\$3.5B



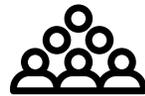
Total sales

569+



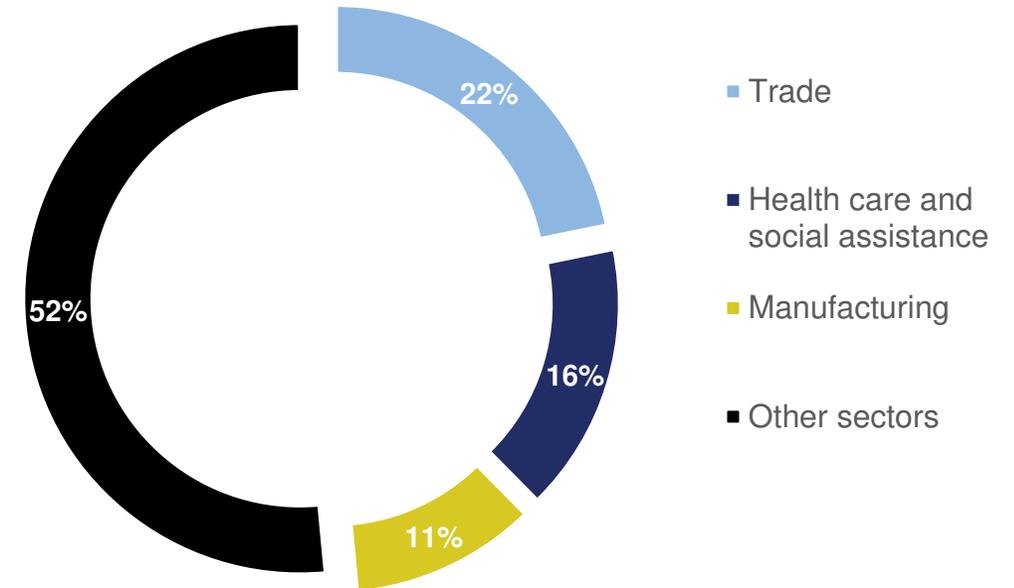
Number of businesses

22,200+



Number of jobs

Distribution of employment in the territory by sector in 2020



04 Laval: a strong economy

Manufacturing

Total sales

\$3.5B

Sales growth of **8.4% on average** per year compared to **3%** in Quebec as a whole.

A total of **71%** of manufactured goods sales are in Canada.

GDP

\$1,894M

11% of the region's GDP

Manufacturing GDP in Laval grew **21%** between 2015 and 2019, faster than for Quebec as a whole (**17%**).

Exports

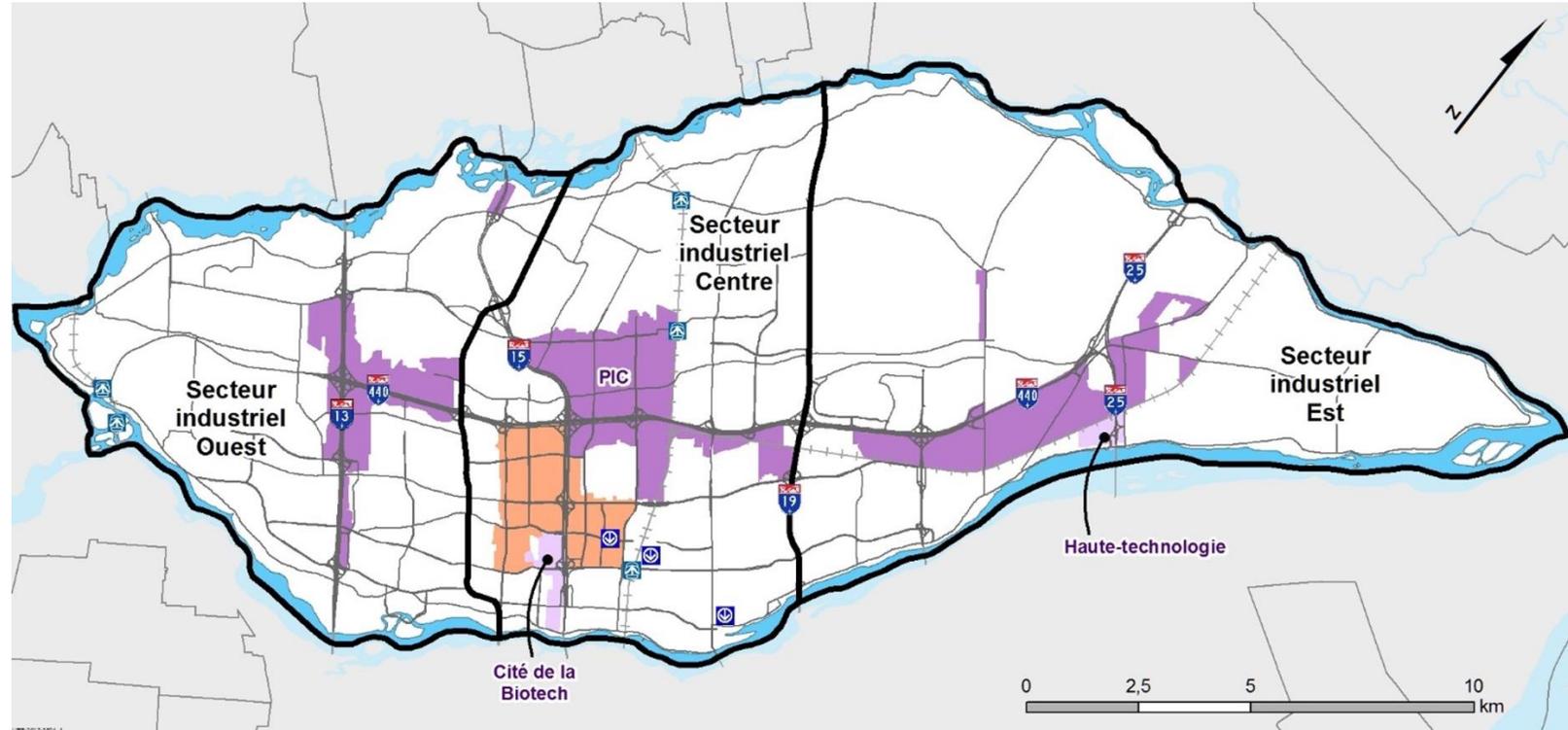
A total of **29%** of manufactured goods are exported outside Canada.

04 Laval: a strong economy

The industrial zone

In addition to the Biotech City, Laval has a large industrial zone divided into 3 main sectors:

- West industrial park
- Centre industrial park
- East industrial park
- Biotech City (technology park that specializes in life sciences and health technologies)
- The industrial area is 171.5 million ft² with over 25 million ft² to be developed.



04 Laval: a strong economy

Investments

Investments in the manufacturing sector are generally aimed at increasing the production capacity or productivity of plants. This is achieved through the acquisition of machinery and equipment and building construction (i.e. a permanent and immobile structure).

- In 2019, manufacturing investment in Laval totalled \$109.6M. The largest share of investment was in construction (78%), while machinery and equipment accounted for 22%.
- Manufacturing investments in Laval represent 9.4% of all private and public investments, which totalled \$1,161.4M in 2019.

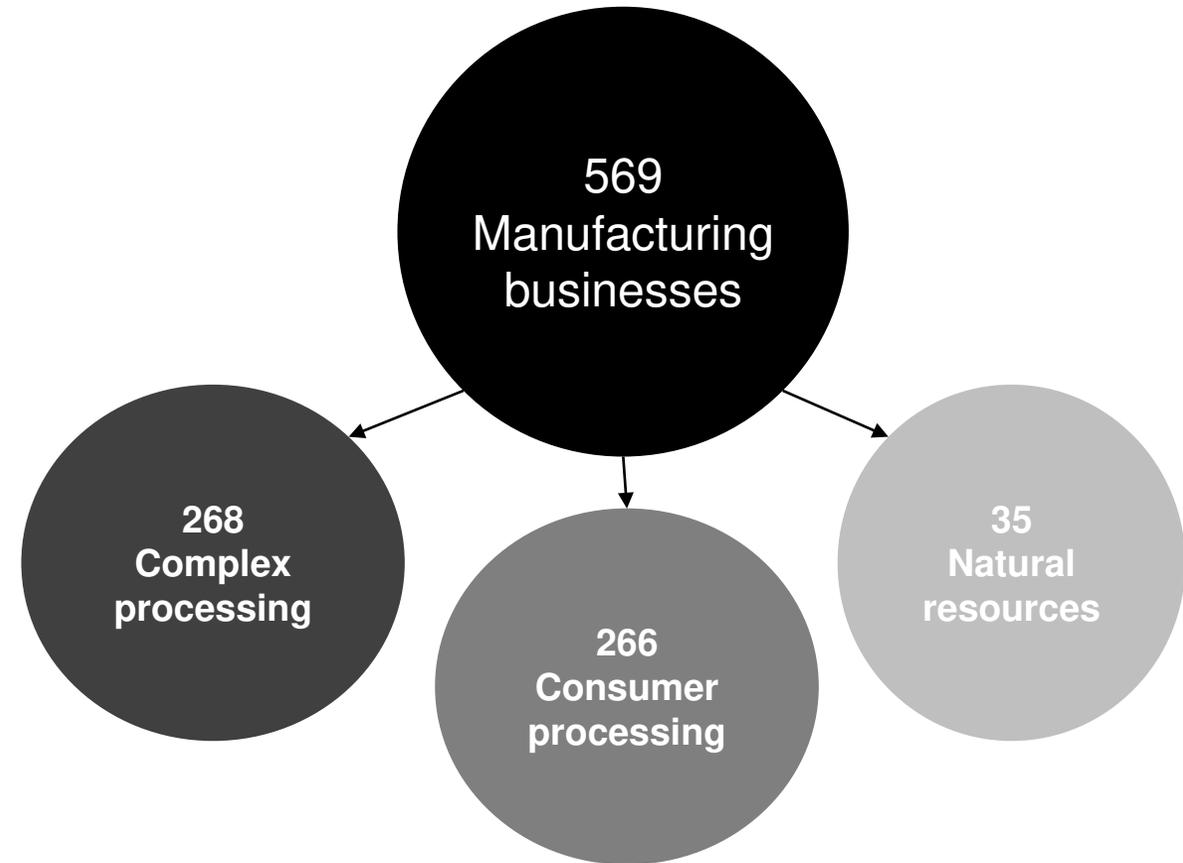
06 An economy focused on complex processing



Complex processing refers to the following sub-sectors: printing, petroleum and coal, chemicals, machinery, computer and electronic products, electrical equipment and appliances, transportation equipment and miscellaneous activities.



47% of manufacturing businesses are complex processing businesses. Laval is **leading the pack** compared to the rest of Quebec.



06 Jobs by manufacturing sector

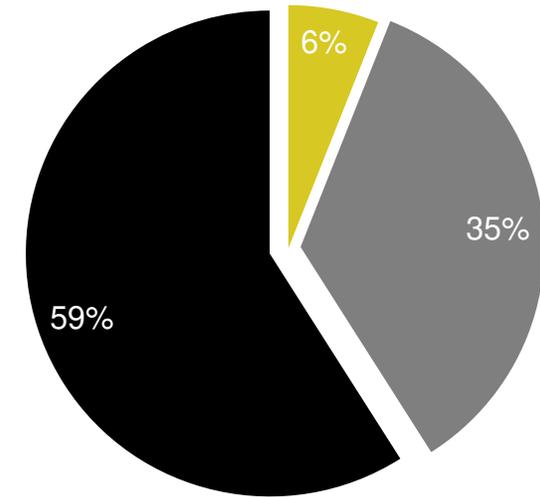


Laval is the region with the largest share of jobs (59%) in the **complex processing sector**.* The region benefits from proximity to research, financial and scientific services centres.

For every 10 manufacturing jobs created in Quebec, 7 service sector jobs are created at the same time.

More than
22,200 jobs
in the
manufacturing
sector

Manufacturing jobs by manufacturing field



■ Natural resources ■ Consumer products
■ Complex processing

*Complex processing: printing, petroleum and coal, chemicals, machinery, computer and electronic products, electrical equipment and appliances, transportation equipment and miscellaneous activities.

05 Laval, a diversified economy

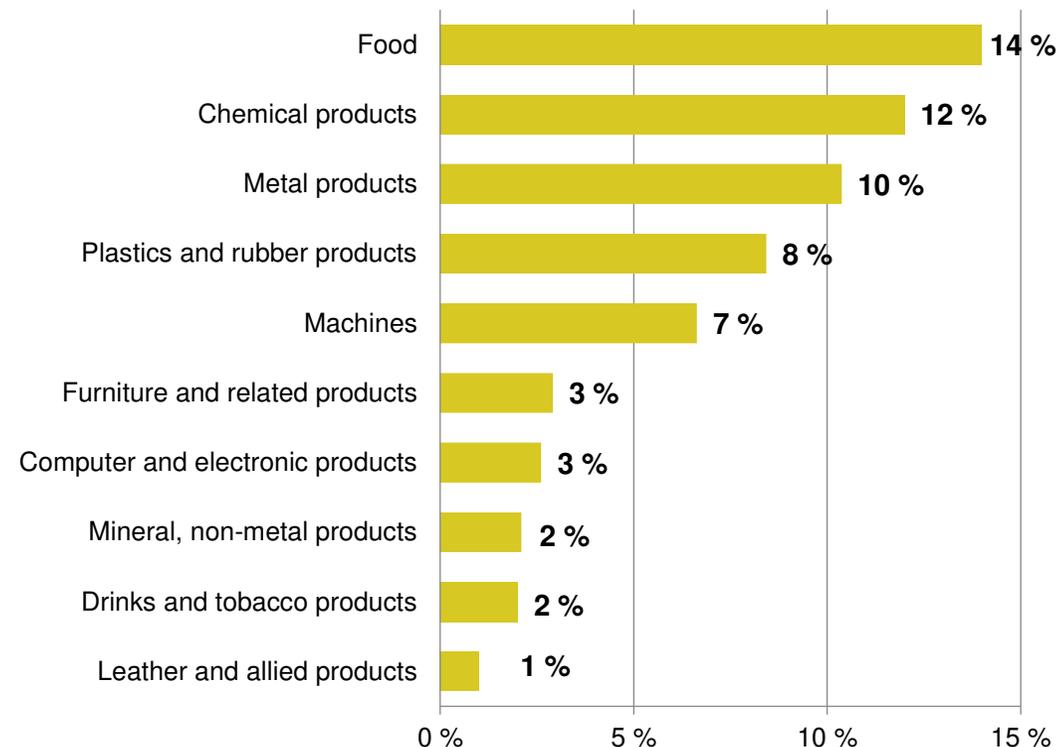


Laval has multiple manufacturing sub-sectors, with a concentration index of 4.3.* Thanks to its large workforce, it is able to develop many sub-sectors.



Five industries generate more than 51% of manufacturing GDP: food manufacturing, chemicals, plastics and rubber products, metal products and machinery.

Manufacturing GDP by sub-sectors

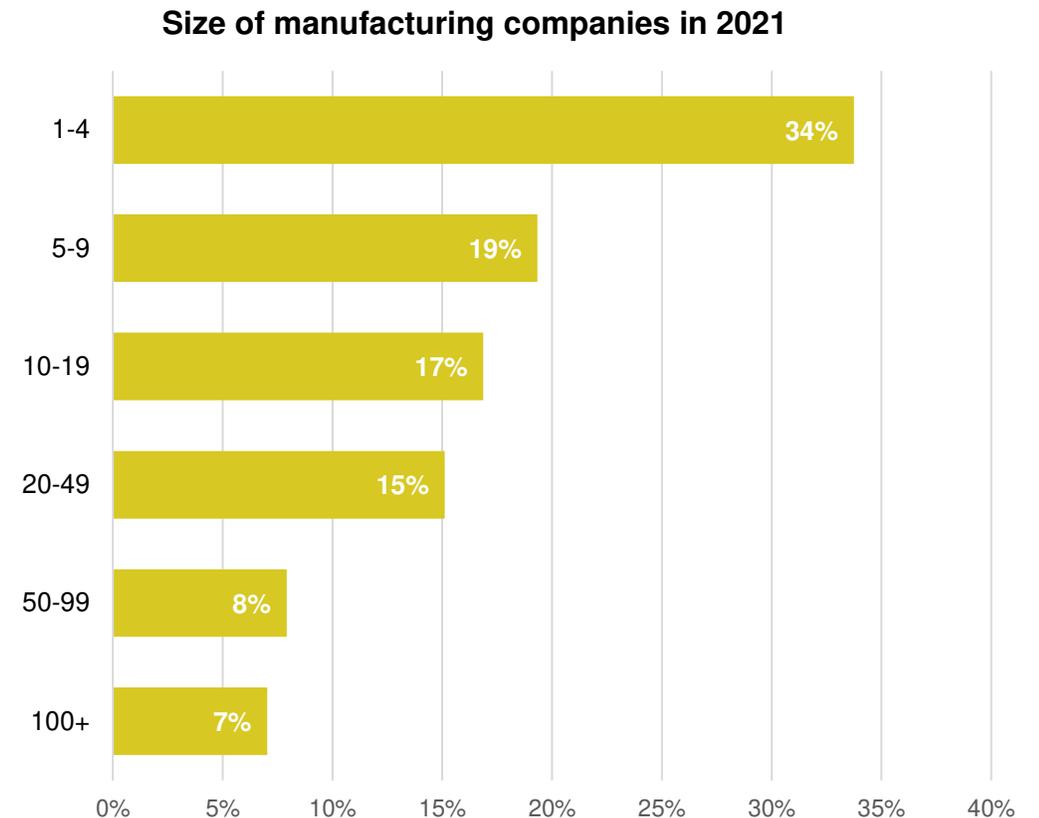


*Concentration index: The manufacturing concentration index measures the relative importance of manufacturing sub-sectors. The higher the concentration index of a region's manufacturing sector, the more employment in the sector depends on a small number of sub-sectors. Manufacturing concentration is also a way of measuring specialization within a region's manufacturing sector.
Sources: Ministère de l'Économie et de l'Innovation (Portrait manufacturiers du Québec 2021 [overview of manufacturers in Quebec])

06 Size of companies

- There were close to **570** manufacturing businesses in Laval in 2021.
- Laval's manufacturing industry is characterized by a high number of SMEs, with 30% of businesses having between 20 employees or more.

Quebec's manufacturing businesses are innovative and the manufacturing sector accounts for nearly one dollar out of every two of innovation spending in Quebec.



07 The manufacturing ecosystem

- **Clusters:** They improve innovation capacity and productivity by facilitating interactions and complementarities between companies. Examples include Aéro Montréal, AluQuebec, Cargo-M.
- **ACCORD niches:** Their objective is to position Quebec's regions as hubs of specific industrial skills recognized in America and the world by developing niches and poles of excellence that can become their brand image. Examples include Alliance Métal Québec (AMQ), Réseau de la transformation métallique du Québec (RTMQ), Polymers Alliance Québec (APQ).
- **Sectoral workforce committees:** Their role is to define the workforce development needs in their economic sector and to support skills development. Examples include aerospace (CAMAQ), industrial metal manufacturing (PERFORM), metallurgy (CSMO-M), plastic manufacturing (PlastiCompétences) and the rubber industry (CSMO-C).
- **Industrial research clusters:** Their mission is to implement and support a collaborative innovation ecosystem that fosters the development of strategic sectors of the economy to benefit research centres, businesses and Quebec's society. Examples include the Consortium for Research and Innovation in Aerospace in Québec (CRIAQ), the Metal Transformation Research and Innovation Consortium (CRITM), and the Centre québécois de recherche et de développement de l'aluminium (CQRDA).



08 Aerospace, a growing sub-sector

This is an emerging sub-sector and a promising market with:

- More than **1,500** jobs in aerospace manufacturing.
- Certified suppliers.
- Important international subsidiaries in the territory.
- High sectoral capitalization.
- The highest R&D spending of all manufacturing sectors.
- High-value employment opportunities.
- A highly-skilled workforce.

08 A diversified sector and specialized leaders

Aerospace sub-sector

Some examples:

Aerostructure



Interiors

F/LIST



Landing gear



LIEBHERR

Parts manufacturing and distribution



Services



Suppliers



CanaCables

LIEBHERR



LATÉCOÈRE



08 Metal fabrication, an important industry sub-sector

This sub-sector is broken down as follows:

1. Metal products
2. Machine manufacturing
3. Transportation equipment manufacturing

130+ businesses
6,000+ employees

- 70% of companies focus on training
- 35% are considering automation
- 31% are considering the introduction of new technologies



08 Some key players

Metal industry

- Fourgons Transit
- Metaltech-Omega
- Security Chimneys International
- Sidel
- Tornatech

Plastics industry

- Balcan Packaging
- DBM Group
- Pelican
- Poly EXPERT
- Propals



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