

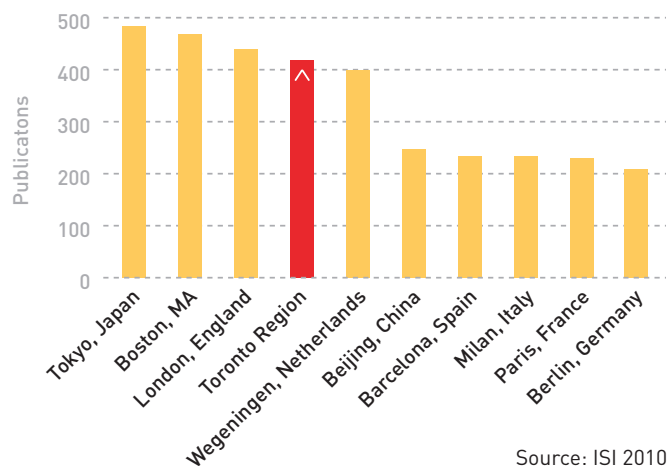
GLOBALLY-RECOGNIZED CLUSTERS IN THE TORONTO REGION: FOOD & NUTRITION

THE TORONTO REGION IS ...

- The second largest food cluster in North America (after Chicago) – a \$21 billion annual industry that employs over 78,000 workers in agriculture and food production/ manufacturing; 281,000 workers in related sectors such as distribution, retail and food service
- A major hub of 650 companies that provide products and services, including: Canada Bread Company Limited, Casco Inc., Feedco North America Corp., General Mills Canada, H.J. Heinz Company of Canada Ltd., Hershey Canada Inc., Kraft Canada, Loblaw/George Weston, Maple Leaf Foods Inc, Maple Lodge Farms Ltd., Neilson Dairy, Newly Weds Foods Co., Parmalat, Parrish & Heimbecker Limited, and Unilever Canada
- A leading innovative region, ranking #2 for food-related patents compared to global competitive cities
- The location of a sophisticated customer base that includes a culturally-diverse population and food companies accessing multiple market channels
- Home to the Ontario Agricultural College (at the University of Guelph) which focuses on four primary areas: food, agriculture, environment and rural communities
- The nexus for strong links between industry and public sector R&D via networks and organizations such as: Advanced Food and Materials Network (hosted by the University of Guelph), Guelph Partnership for Innovation, Soy 20/20, Ontario Agri-Food Technologies, Program in Food Safety, Nutrition and Regulatory Affairs, Guelph Food Technology Centre, and Agricultural Research Institute of Ontario
- More than 100 industry associations, councils, networks
- Producing an educated and highly-skilled workforce from more than 64 university and college programs, in agriculture, nutritional science and culinary arts: 4,700 graduates at all levels in 2009
- An advanced research centre that produces 32% of food-related scientific publications in Canada
- ranks #4 among international cities for the number of food-related publications; and ranks #8 internationally for scientific impact of publications (based on citations per publication)

Food-Related Publications By Global Competitive Regions (1999 - 2009)

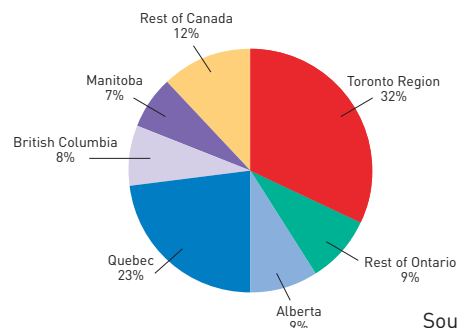
Total Global Publications: 24,790



Source: ISI 2010

Food-Related Canadian Publications (1999 - 2009)

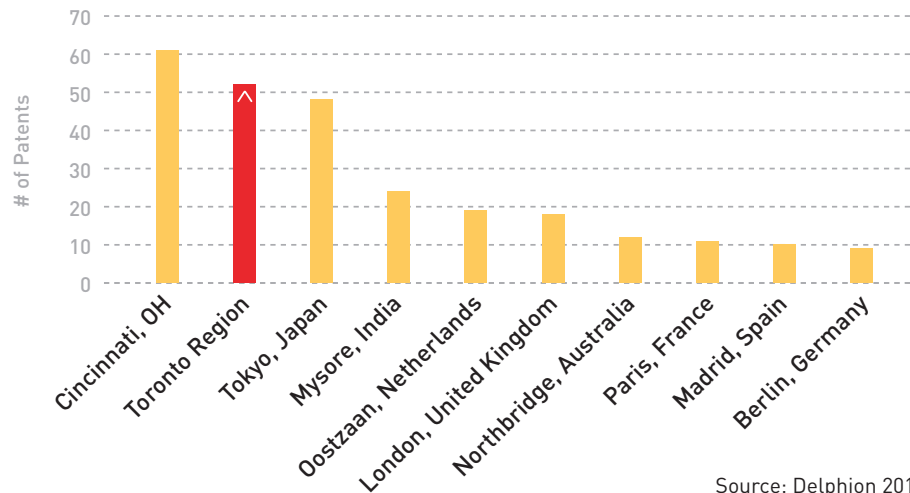
Total Canadian Publications: 1,169



Source: ISI 2010

Food-Related Patents By Global Competitive Regions (1999 - 2009)

Total Global Publications: 6,193



Source: Delphion 2010

ADVANTAGES

- A world-leading economic region:
 - Ranked #1 for the soundness of its banking system by World Economic Forum (Global Competitiveness Report 2008-2009)
 - Ranked #3 in North America by MasterCard's Worldwide Centres of Commerce (2008)
 - Ranked #7 Top City Regions of the Future by Foreign Direct Investment magazine (2009)
 - Ranked #10 of the World's Top Global Cities (Global Cities Index (2008)
 - Ranked #10 most economically powerful city by Forbes.com (July 2008)
 - Ranked #11 of 62 in the 2009 Global Financial Cities Index
- 7.4 million people live in the Toronto Region, making it the 4th largest urban region in North America
- Immigration responsive to company needs:
 - Uncapped number of work permits available to foreign workers
 - Process for intra-company transfers is fast and straightforward
 - Special programs allow employers to permanently recruit high-end research staff and other workers within defined occupations
- Business-friendly environment:
 - Canada ranked #1 in number of procedures required to start a business, and #2 in time required to start a business (World Economic Forum, Global Competitiveness Report 2008-2009)
 - Ranked #4 globally for Ease of Doing Business by MasterCard Worldwide Center of Commerce Index (2008)
- Highly-skilled workforce of 1.8 million (25-64 years of age) drawn from the most educated population in the G8: 64% hold a post-secondary degree or equivalent
- Part of a well-developed transportation infrastructure – air, rail and highway corridors – that easily moves people and goods to cities in the US Midwest and Northeast

WORLD-CLASS RESEARCH AND EDUCATION

- Toronto Region universities are a hub of research excellence recognized by major Canadian granting agencies:
 - Canadian Institute for Health Research (CIHR) awarded \$22.4 million (40% of the national total) to research projects in the Toronto Region, 1999-2009
 - Natural Sciences and Engineering Research Council (NSERC) awarded \$10.1 million (28% of national total) to research projects in the Toronto Region, 1999-2009
 - Canada Foundation for Innovation (CFI) awarded \$8.6 million (27% of the national total) in infrastructure grants to food-related projects in the Toronto Region, 1999-2009
- A centre of advanced research and development with 21 research institutes in Toronto Region universities:
 - **McMaster University:** Children's Exercise and Nutrition Centre
 - **Ryerson University:** Centre for Studies in Food Security (CSFS)
 - **St. Michael's Hospital:** Clinical Nutrition and Risk Factor Modification Centre
 - **University of Guelph:** Canadian Research Institute for Food Safety (CRIFS), Centre for Nutrition Modeling, Food System Biotechnology Centre, Aquaculture Centre, Centre for Food and Soft Materials Science, Guelph Food Research Centre, Centre for the Genetic Improvement of Livestock (CGIL), Institute of Agri-Food Policy Innovation, and Human Nutraceutical Research Unit (HNRU)
 - **University of Toronto:** Centre for Urban Health Initiatives, Department of Nutritional Sciences
 - **University of Waterloo:** Schlegel-UW Research Institute for Aging

SUPPORTIVE GOVERNMENT PROGRAMS

- **Government of Canada:** Agri-Opportunities Program, AgriProcessing Initiative (API), Canadian Dairy Commission's Matching Investment Fund (MIF), Small Project Accelerated Review Process (ARP), Southern Ontario Development Program (SODP)
- **Government of Ontario:** Guelph Food Technology Centre (GFTC) Sustainability Services, Ontario Market Investment Fund (OMIF), Rural Economic Development Program

Web Links

Toronto Region Research Alliance www.trra.ca

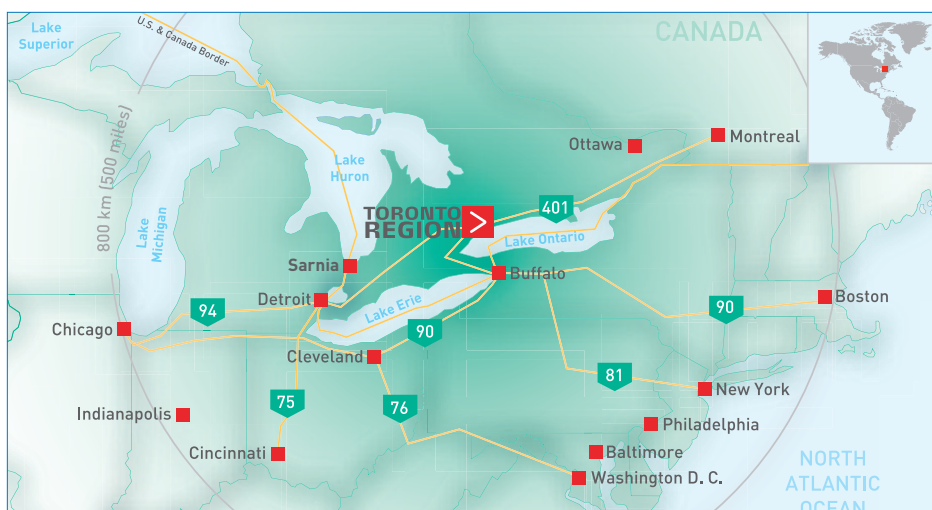
University of Guelph www.uoguelph.ca

McMaster University www.mcmaster.ca

Ryerson University www.ryerson.ca

University of Toronto www.utoronto.ca

St. Michael's Hospital www.stmichaelshospital.com



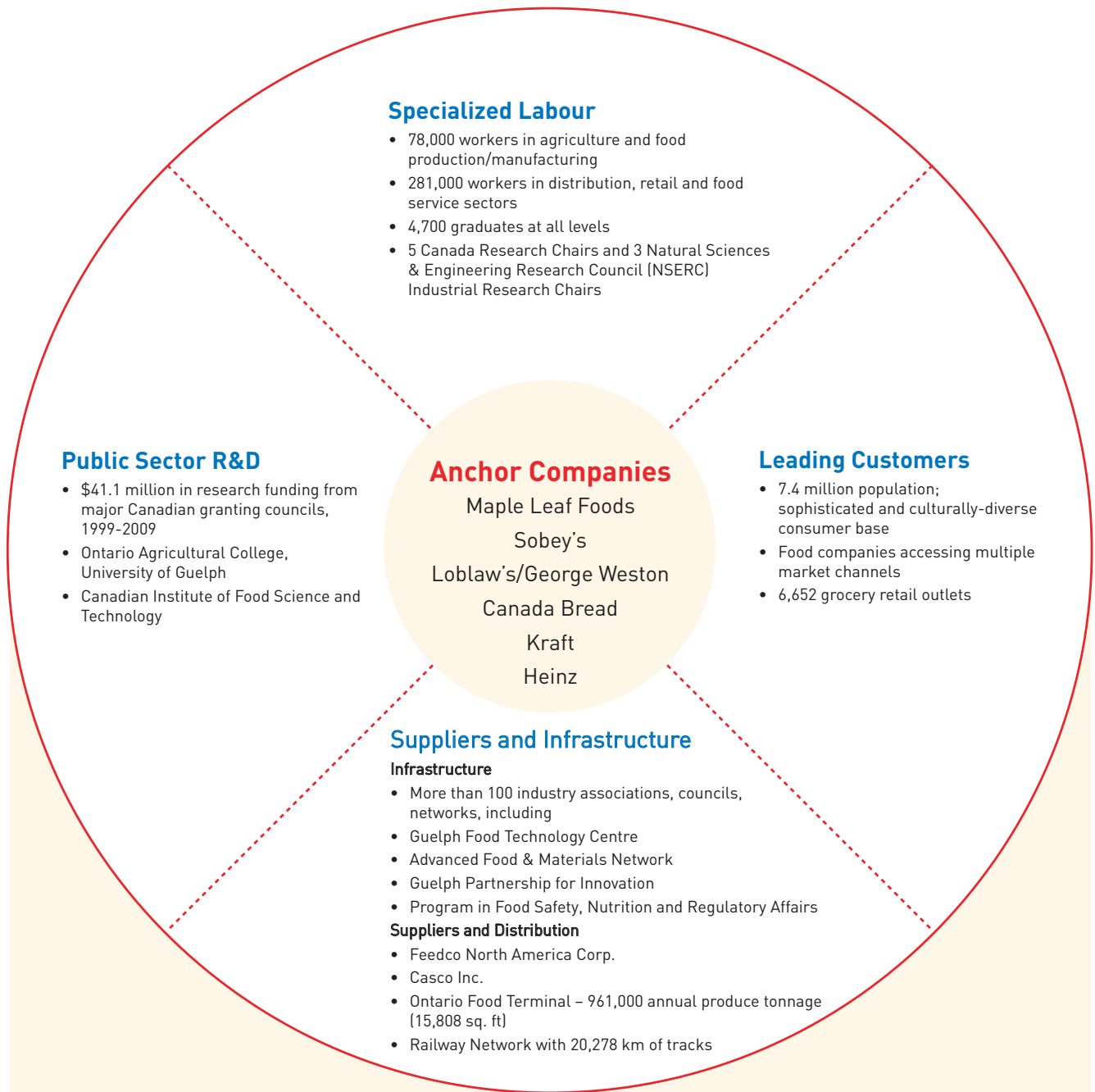
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April, 2010

FOOD & NUTRITION IS A STRONG R&D CLUSTER IN THE TORONTO REGION



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