

GLOBALLY-RECOGNIZED CLUSTERS IN THE TORONTO REGION: STEEL

THE TORONTO REGION IS ...

- Home to Hamilton, Canada's steel capital which is located in south central Ontario
 - Ontario recorded \$10.2 billion in steel shipments in 2006, the third highest region in North America, and is projected to reach \$13.2 billion in steel shipments in 2008
- The site of a dynamic cluster of major steel companies, including: ArcelorMittal Dofasco, US Steel Canada (formerly Stelco), Gerdau Ameristeel Inc., Laurel Steel Division of Harris Steel Group, several divisions of Samuel, Son & Co., and Russel Metals Inc.
- The location of a sophisticated customer base that includes major auto sector companies such as: Chrysler Canada, Ford Canada, General Motors Canada, Honda Canada, Linamar Corporation, Magna International, Toyota Canada, and Westcast Industries
- Producing a highly-educated and highly-skilled workforce: more than 4,600 college and university graduates from engineering and technical programs in 2006

ADVANTAGES

- A world-leading economic region:
 - Named one of the world's top 10 economic centres by Standard & Poor's in 2007
 - Ranked #2 Top City Regions of the Future by Foreign Direct Investment magazine (2007)
 - Ranked #10 most economically powerful city by Forbes.com (July 2008)
- 7.2 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
- Canada's largest centre for research and education – location for 35% of all R&D conducted in Canada
- 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

- Ranked #5 region in North America based on the number of published articles on steel and materials:
 - The University of Toronto, University of Waterloo and McMaster University are among the top 15 universities in North America to publish articles related to steel and material science
- Toronto Region universities are a hub of research excellence recognized by the National Science and Engineering Research Council (NSERC):
 - 170 (24%) of NSERC-funded experts and Canada Research Chairs are based in the region
 - \$9+ million in NSERC grants allocated to Toronto Region researchers in 2006-07

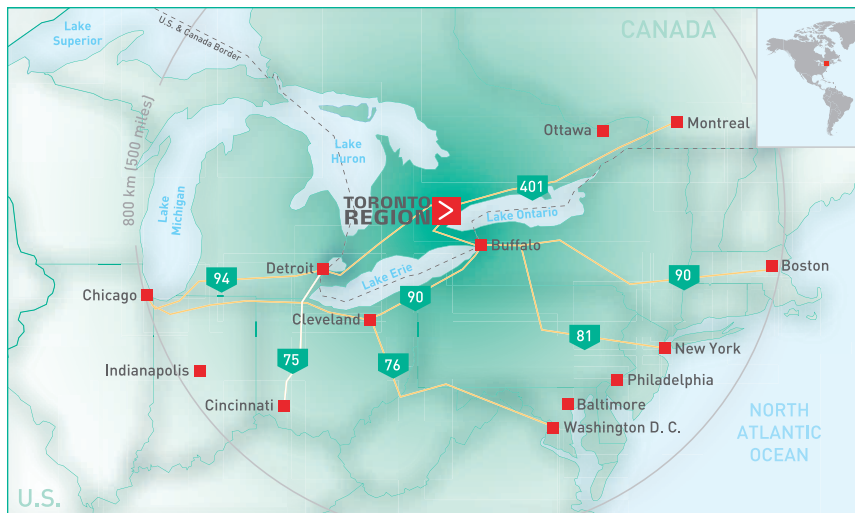
WORLD-CLASS RESEARCH AND EDUCATION (CONTINUED)

- A centre of advanced research and development based in Toronto Region universities with 75 engineering, technical and materials programs; 30 steel and materials science research institutes, including:
 - **McMaster University:** Steel Research Centre, Brockhouse Institute for Materials Research; Centre for Advanced Polymer Processing & Design; Centre for Electrophotonic Materials & Devices; Centre for Mechatronics and Hybrid Technologies; Centre for the Effective Design of Structures; General Motors of Canada Centre for Automotive Materials and Corrosion; Initiative for Automotive Manufacturing Innovation; McMaster Institute for Automotive Research and Technology; McMaster Institute for Polymer Production Technology; McMaster Institute for Transportation and Logistics; McMaster Manufacturing Research Institute; Metal Forming Laboratory;
 - **University of Waterloo:** Sustainable Energy Research; Waterloo Advanced Technology Labs (Wat abs); Waterloo Centre for Automotive Materials and Manufacturing (WatCMM); Waterloo Centre for Automotive Research (WatCAR); Waterloo Management of Integrated Manufacturing Systems (WatMIMS)
 - **University of Toronto:** Centre for Advanced Coating Technologies; Energenius Centre for Advanced Nanotechnology; Institute for Aerospace Studies; Institute for Knowledge Innovation and Technology
 - **York University:** Institute for Research and Innovation in Sustainability
- CANMET-MTL, federal government's Materials Technology Laboratory research centre is slated to open at McMaster Innovation Park in 2010. CANMET-MTL has a start-to-finish capability covering the complete materials cycle from materials selection, fabrication, service performance and characterization to prototype/product development.

Top 15 Publishers (North America) on Steel by University from 2000-2007

University of Illinois	305
Penn State University	285
University of California – Berkeley	229
University of Texas	226
Ohio State University	221
University of Toronto	214
University of Michigan	196
University of California – San Francisco	173
University of Waterloo	171
Georgia Institute of Technology	158
University of Wisconsin	156
University of Missouri	151
McMaster University	148
Lehigh University	148
Purdue University	147

Source: ISI



FOR MORE INFORMATION CONTACT:

Michael Williams,
Senior Vice President,
Investment Attraction
Tel: 416 673 6676
mhwilliams@trra.ca