



Sarnia-Lambton Community Presentation

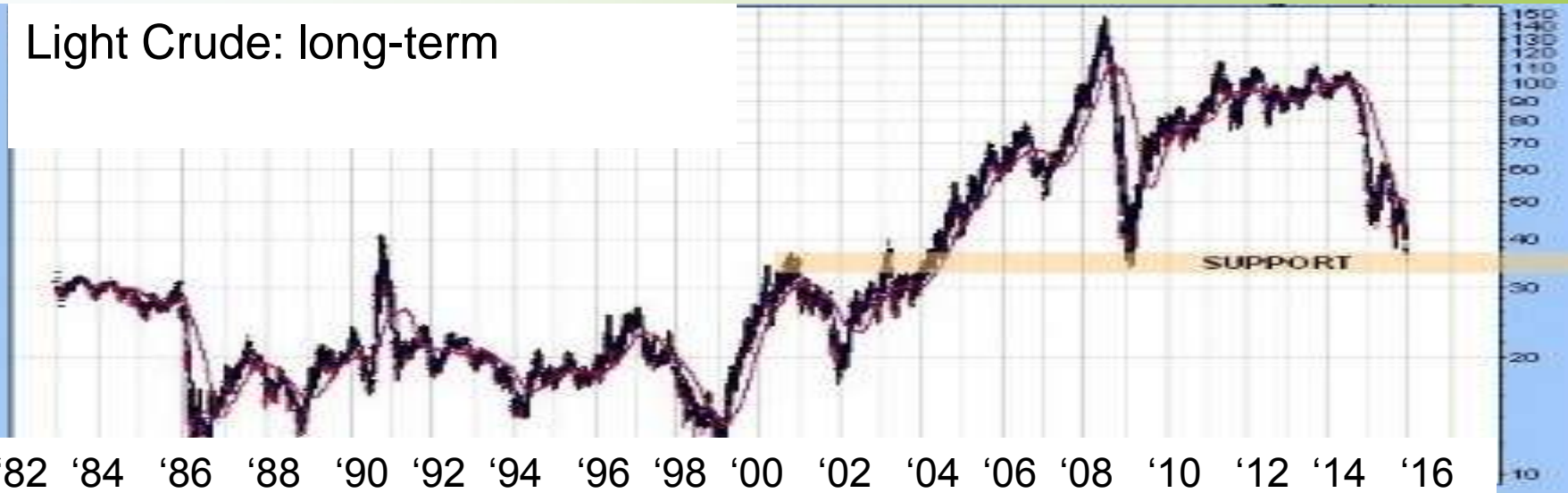
Sarnia-Lambton Economic Partnership
December 17, 2015

Sarnia-Lambton Economic Partnership Board

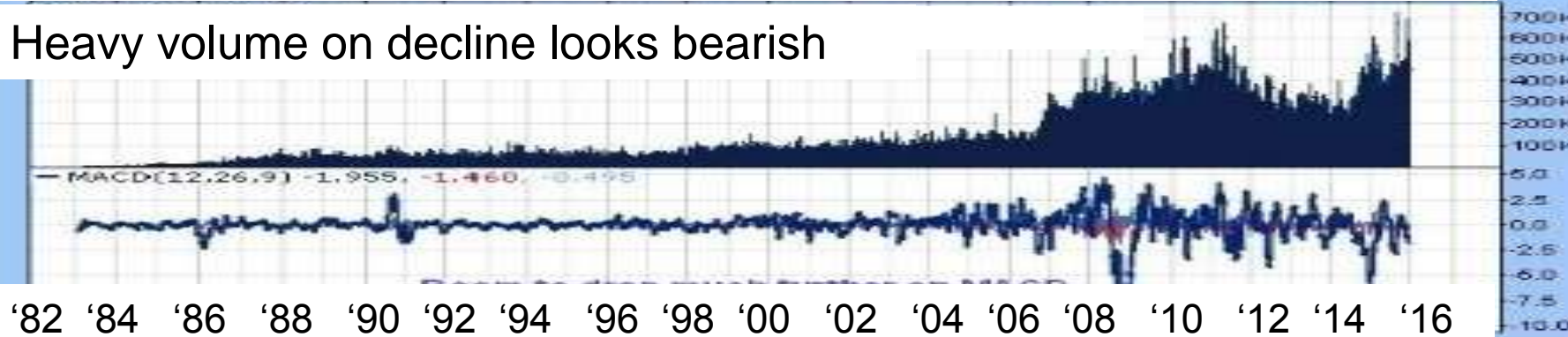
- Chad Anderson - Farmer
- Don Anderson - General Manager, Sarnia-Lambton Business Development Corporation
- Mike Bradley - Mayor, City of Sarnia, **Chair**
- Bev MacDougall - Warden, County of Lambton
- Sue Drellick - Waterville TG Inc.
- Mario Fazio - Sarnia Lambton Real Estate Board
- Ted Hext - President, Sarnia & District Labour Council
- Bruce Hein - Express Employment Professionals, **Vice-Chair**
- Jane Keast - Suncor Energy
- Margaret Misek-Evans - City Manager, City of Sarnia
- George Mallay - General Manager, Sarnia-Lambton Economic Partnership (Ex-Officio)
- Ross McEachran - Vidal Street Industrial Park
- Judy Morris - President and CEO, Lambton College
- Alex Palimaka - Bluewater Power
- President, Sarnia-Lambton Chamber of Commerce
- Ron Van Horne - CAO, County of Lambton, **Secretary-Treasurer**

Long-term Crude 1982-2015

Light Crude: long-term

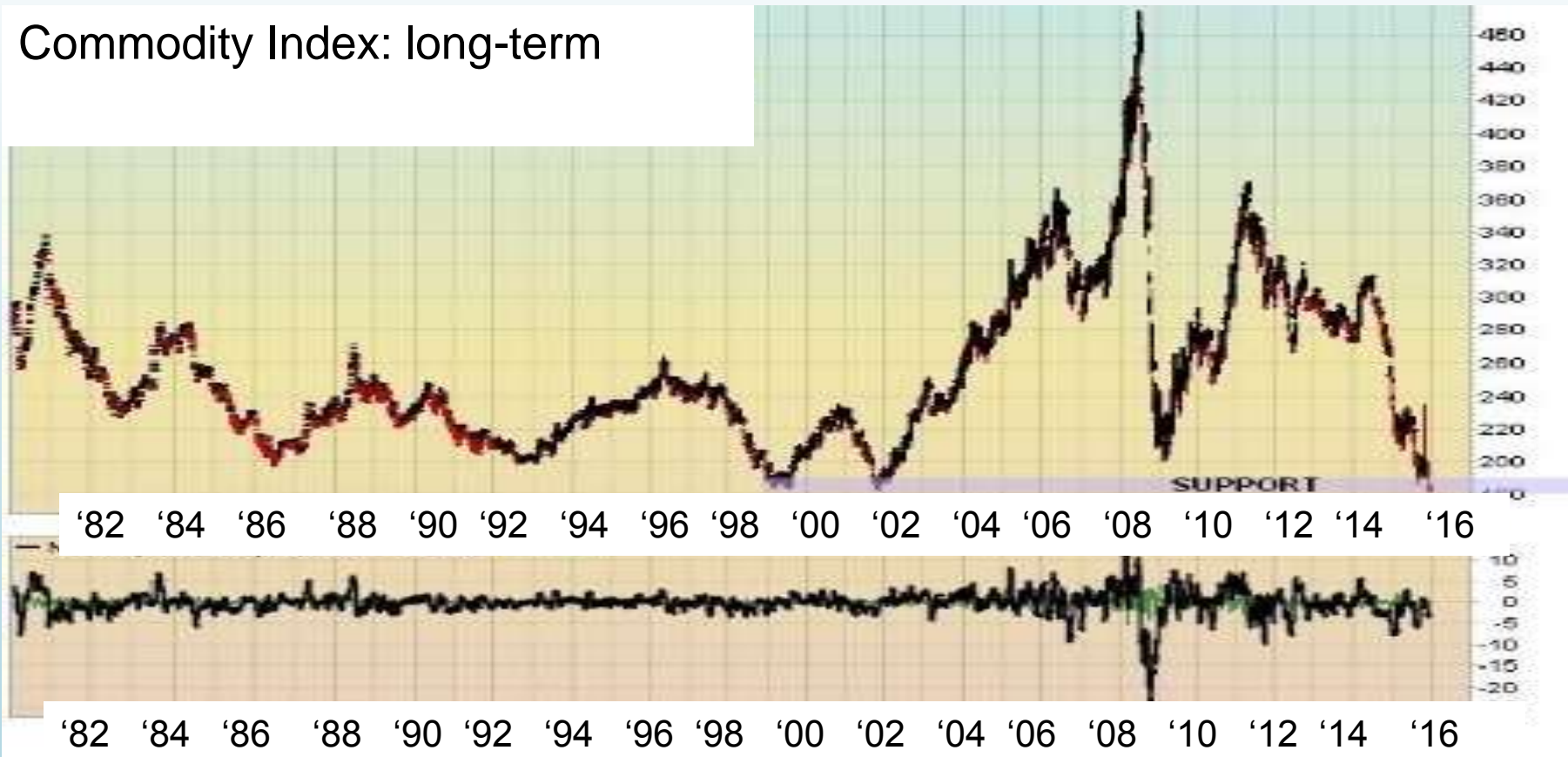


Heavy volume on decline looks bearish



CRB Commodity Index 1982-2015

Commodity Index: long-term



Baltic Dry Index – 2003-2015

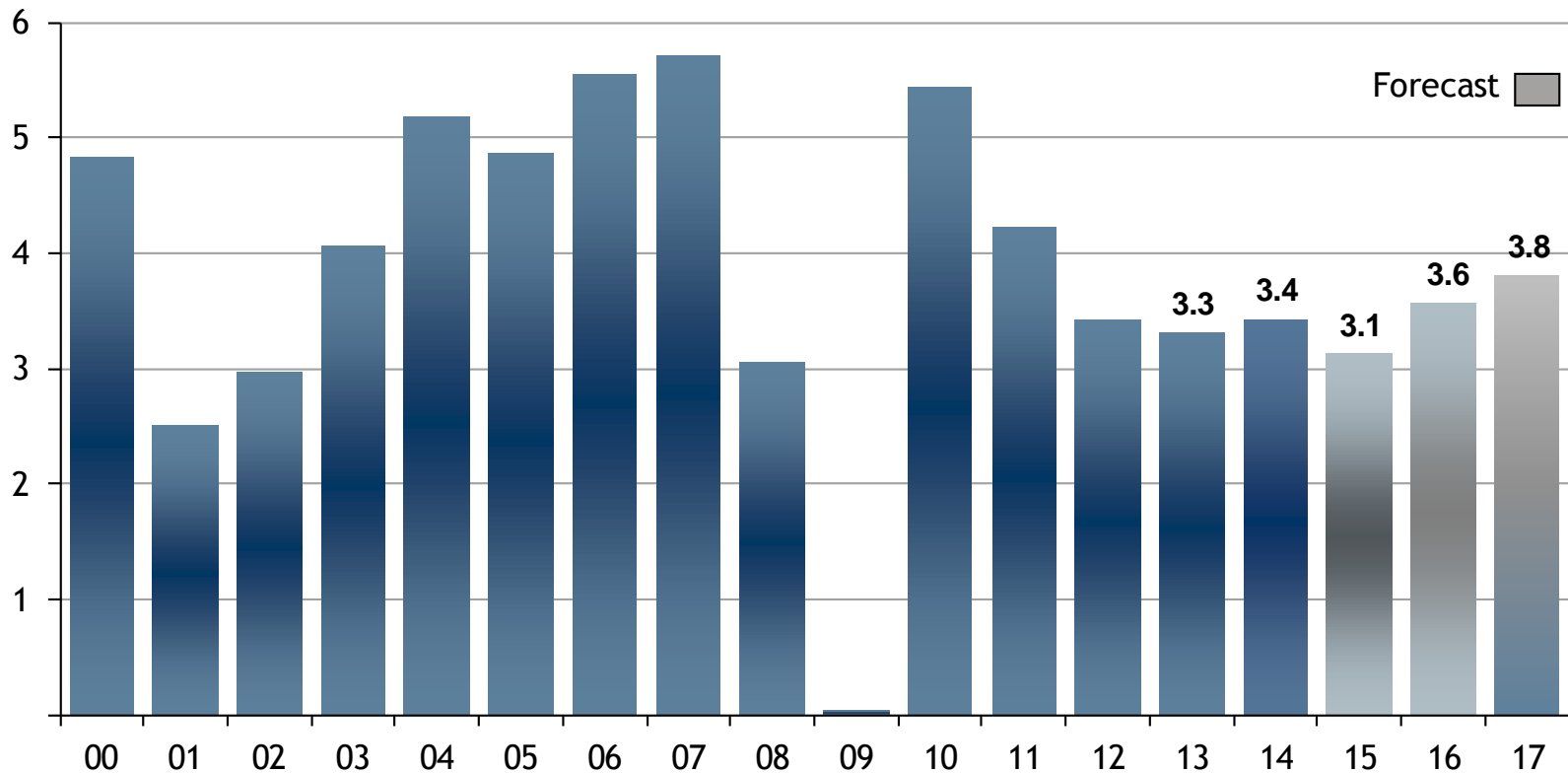
Baltic Dry Index: long-term



World GDP Growth 2000-2017

World GDP growth

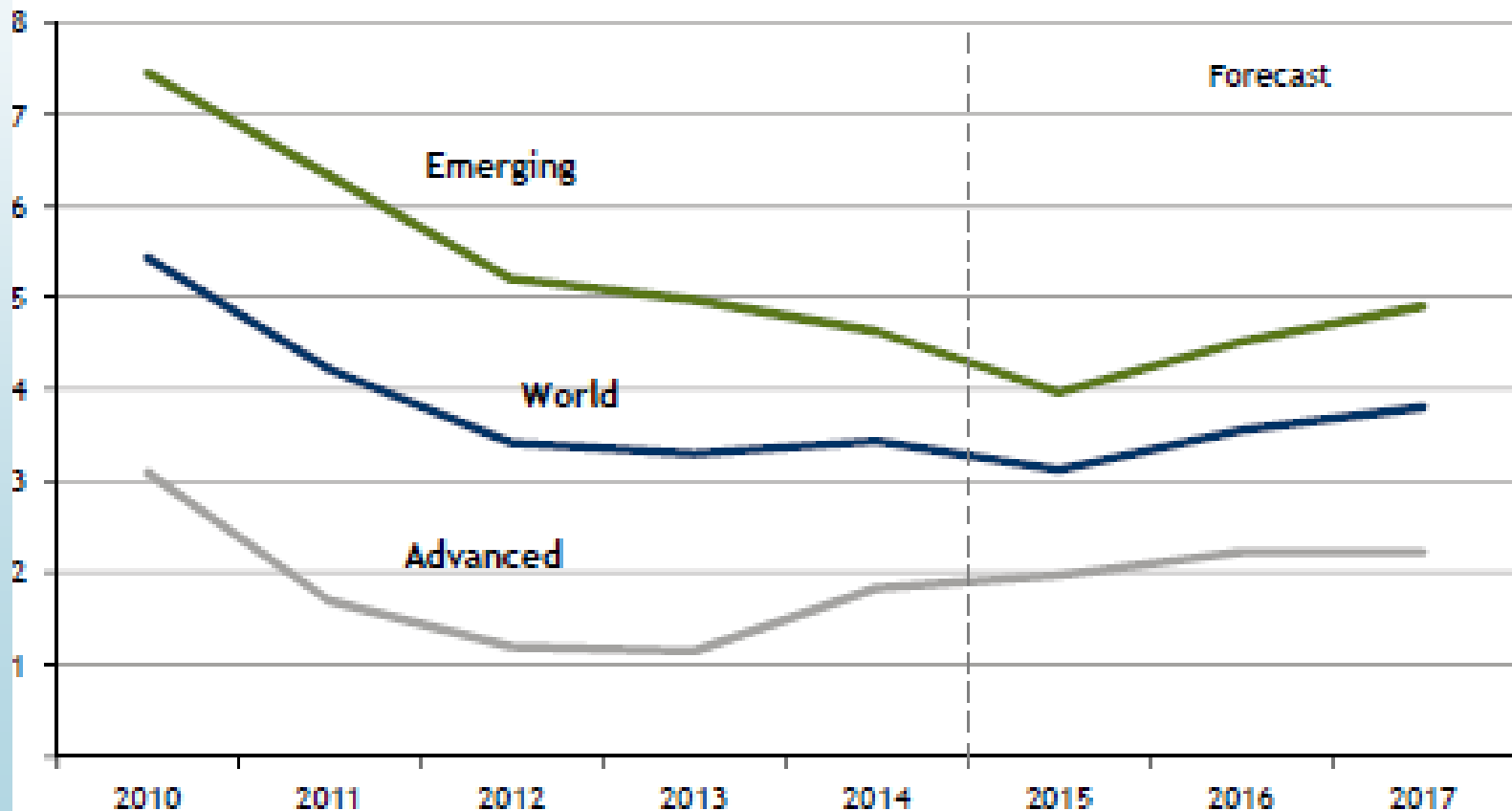
% change



Global Growth Emerging, World & Advanced

Global GDP growth

Annual % change

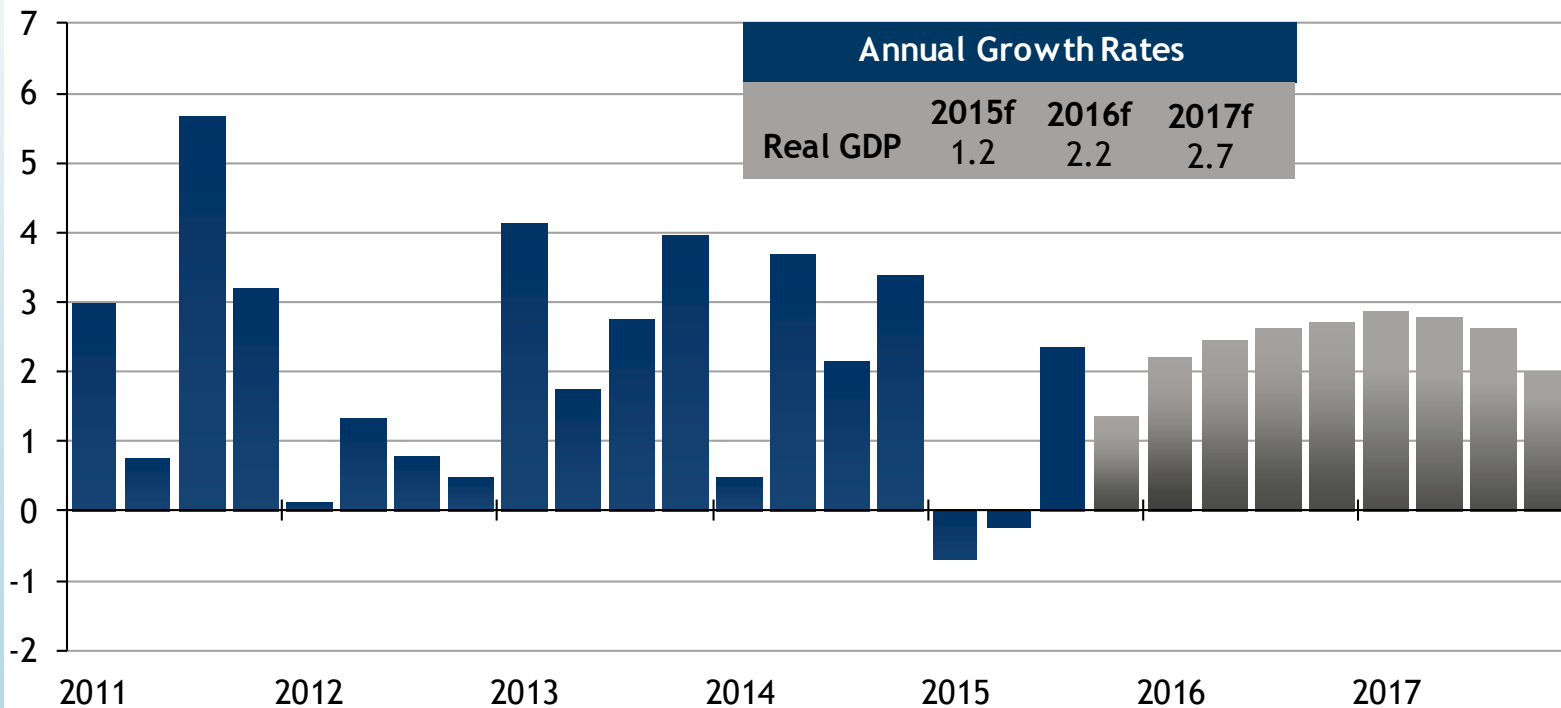


Canadian GDP 2011-2017

Canada's real GDP growth

Quarter-over-quarter % change, annualized rate

Forecast:



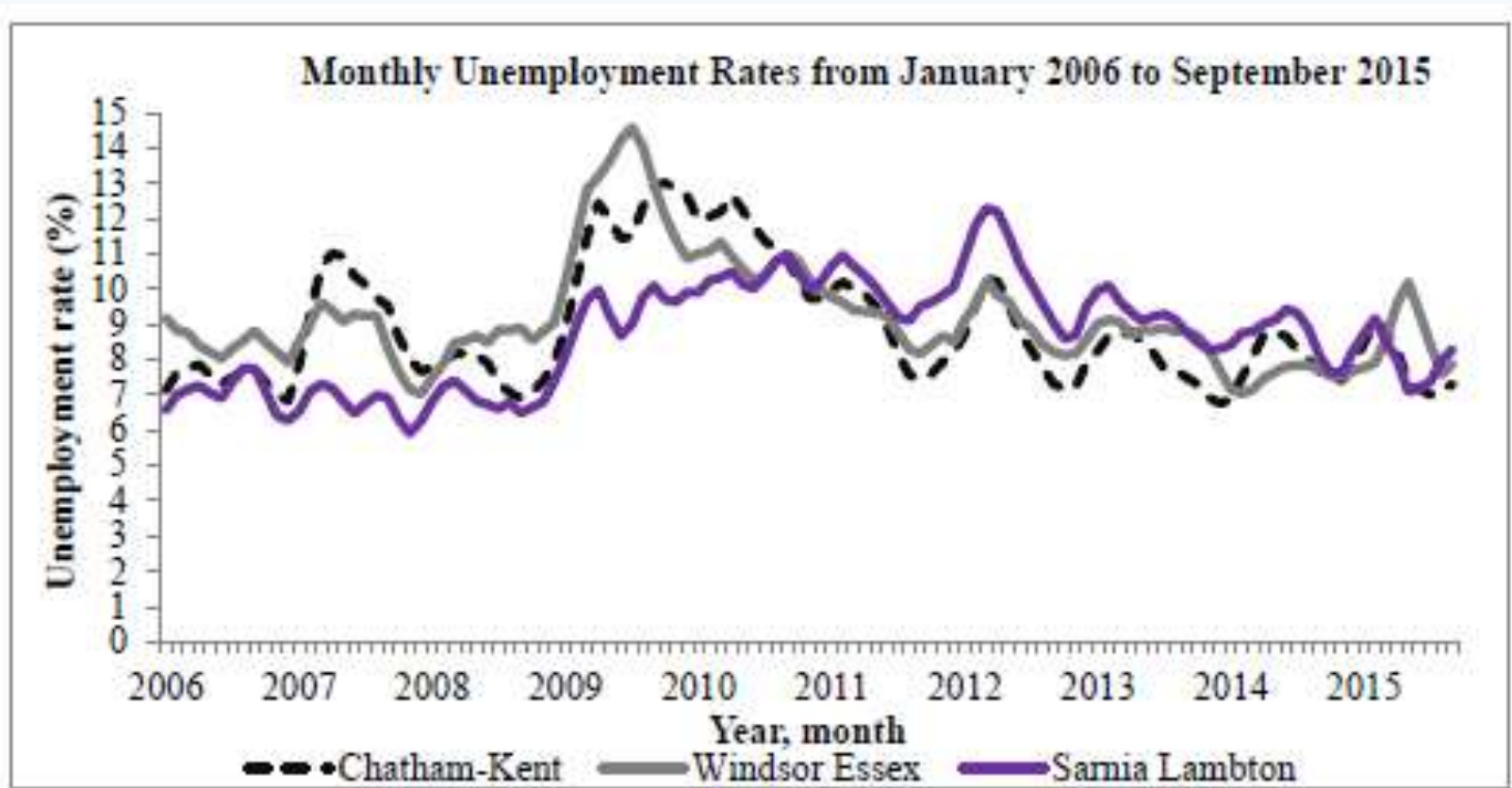
Canadian \$ Benefits Exporters

Exporters getting nice lift from low C\$
 Canada (as of November 16, 2015)



Loonie carving a bottom but to remain low

Sarnia-Lambton Unemployment 2006-2015



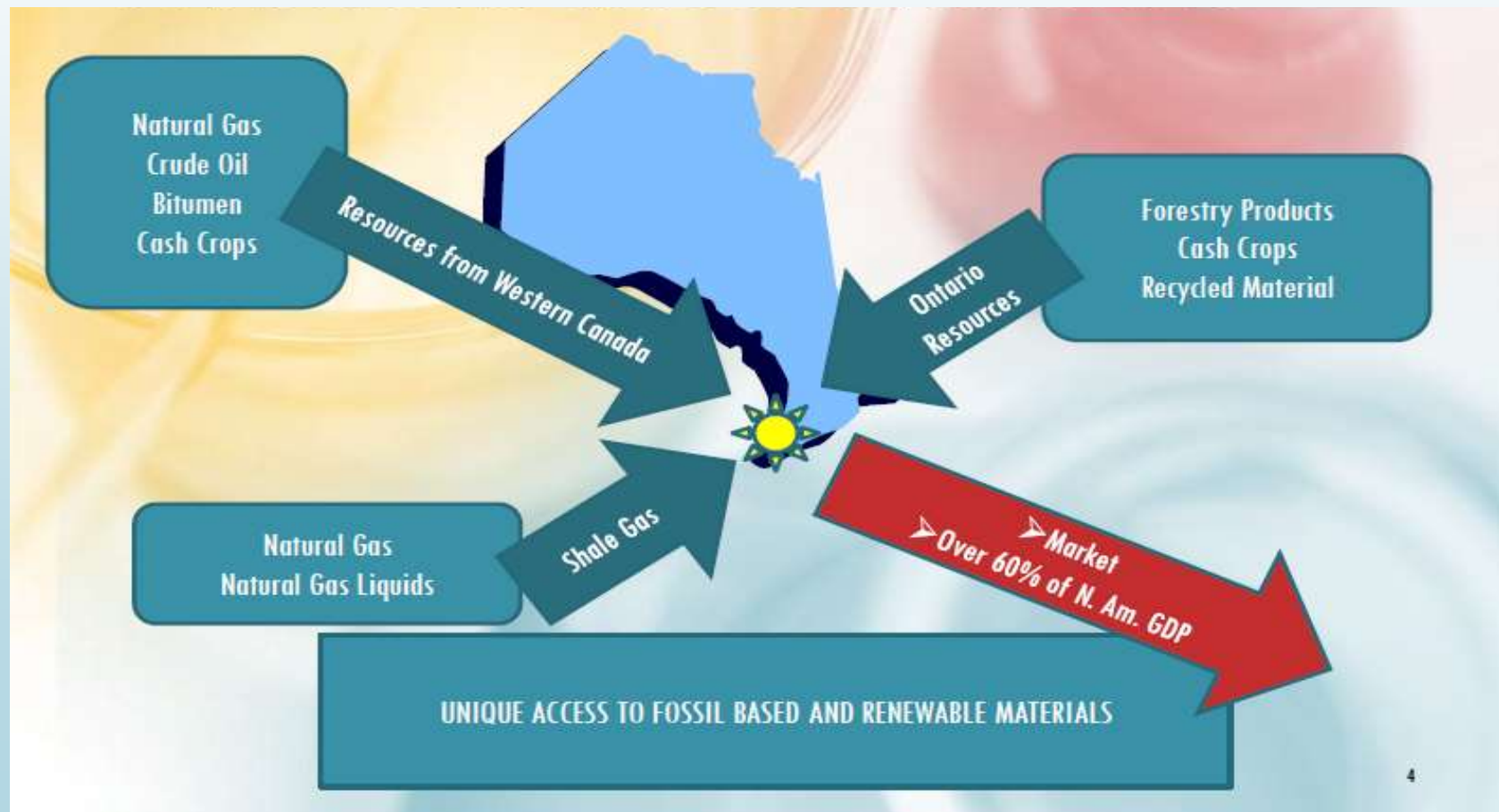
Source: Statistics Canada. *Labour Force Survey, 2006-2015*. Calculated by Strategic Projections.

Investment Prospect Activity

- 9 Bio / petro / shale
- 2 Call centres
- 4 Energy / clean tech
- 5 Advanced manufacturing
- 2 Distribution
- 2 Food processing
- 3 Commercial / retail

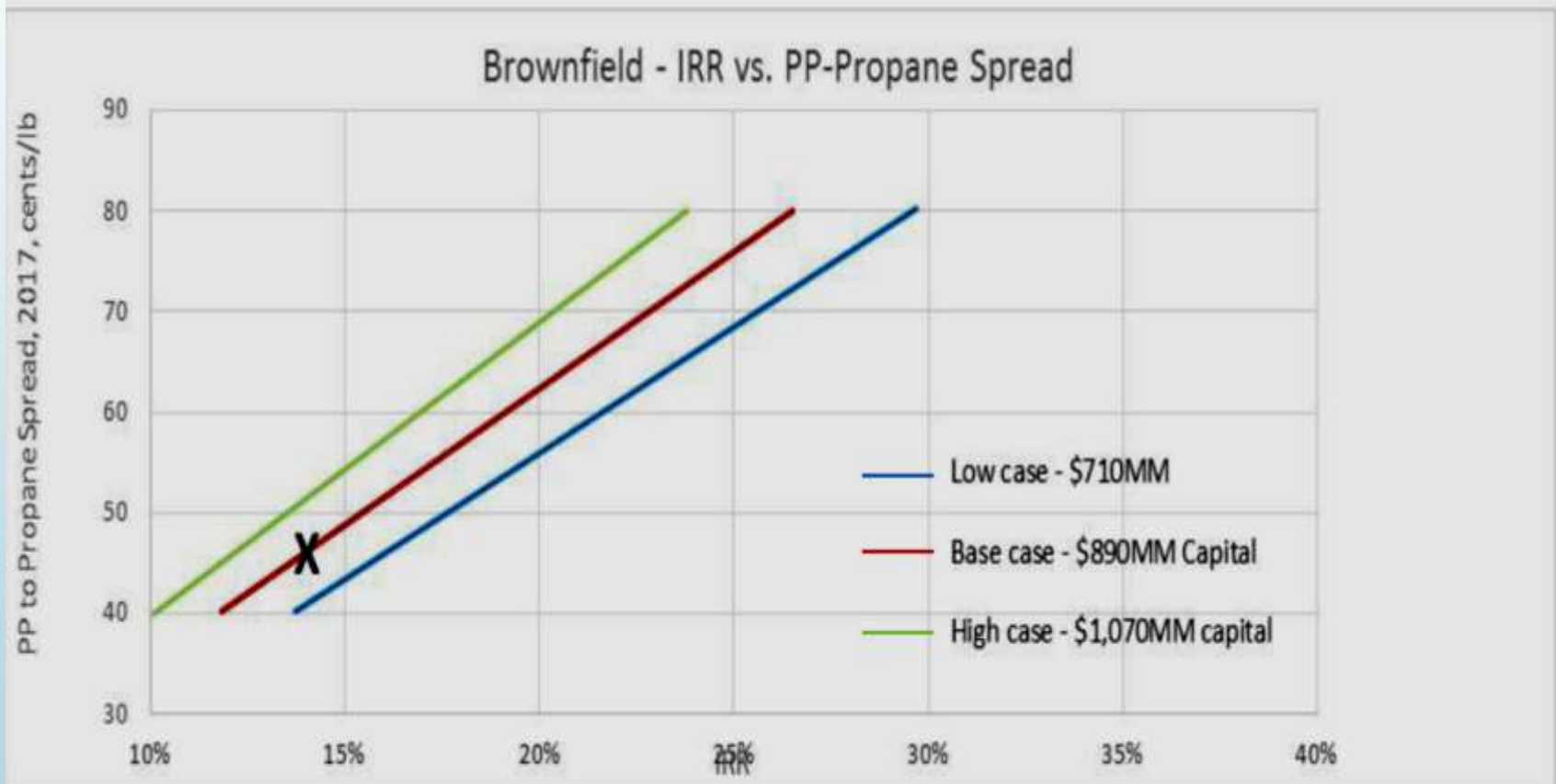
Sarnia-Lambton Biohybrid Chemical Complex

Uniquely positioned for leadership in sustainability



Propylene Investment Opportunities Study

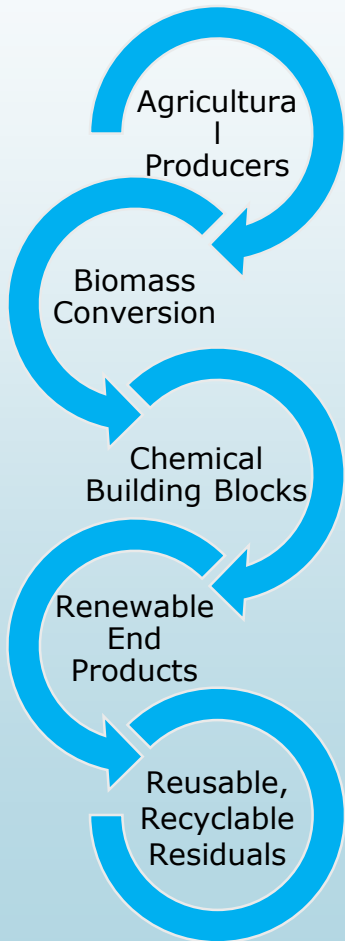
Economic sensitivity of Outputs for Integrated PDH/PP Economic Model



Source: PCI/CMR

Cellulosic Sugar Production Capacity Project

Raw material sourcing – BIC Project



Vision:

An operating agricultural biomass to end-products supply chain by 2020 which is profitable and sustainable for all participants

Target:

Construction of a cellulosic sugar conversion plant in Southern Ontario by 2018 processing up to 250,000 tonnes of agricultural residue


Process:

- 19 technology providers screened vs. decision criteria
- Samples from 8 providers analyzed vs. consumer group specifications and performance under micro-fermentations
- 8 sites visited
- 4 technology providers selected for biomass processing trials and further validation of product quality, mass and energy balance, process efficiencies, economics
- Existing agricultural Cooperative will partner with a technology provider to commercialize first cellulosic sugar production facility

Agriculture and Food Processing



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The Ontario Food Cluster: a full serving of opportunity for the global agri-food sector

The Ontario Food Cluster welcomes international investment to its thriving cluster of 3,200 food and beverage companies that harvest success from within Canada's largest pool of agri-food talent.

With manufacturing revenue of \$36.9 billion, Ontario is one of North America's largest agri-food sectors. Processors purchase about 65% of Ontario's food-related farm production that includes over 200 agricultural commodities. The sector provides almost 740,000 jobs across the province.

Cleantech

Below are the four principal categories of clean technologies, with examples of sub-technologies within each.

ENERGY

- Biofuels
- Energy efficiency
- Fuel cells
- Microturbines
- Small-scale hydro
- Solar photovoltaics
- Wave / tidal power
- Wind power

TRANSPORTATION

- Advanced battery storage
- Alternative-fueled vehicles
- Electro propulsion
- Hybrid-electric vehicles
- Hydrogen refuelling stations

MATERIALS

- Bio-based materials
- Biomimetics
- Green buildings
- Green chemistry
- Phytoremediation
- Recycled materials

WATER

- Biological water filtration
- Decentralized filtration systems
- Small-scale desalination
- Ultraviolet purification
- Wetlands restoration

Process Modules

Sarnia Lambton Industrial Alliance contractors can produce complete petrochemical modules.

Recent examples were 24 x 24 x 120 feet long, weighing 150 tons



Creative Industries

Syfy show, 12 Monkeys, filming at Imperial Oil site



By Paul Morden, Sarnia Observer
Wednesday, November 25, 2015 4:21:26 EST PM



Actors Amanda Schull and Kirk Acevedo speak onstage at the '12 Monkeys' panel during the NBCUniversal Syfy

Vivir en Sarnia-Lambton



Vivir en Sarnia-Lambton
Community Organization

LiveInLambton.ca/Newcomers

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Bienvenido a nuestra página de “Preguntas Frecuentes”. Siga estos enlaces para obtener más información acerca de las leyes canadienses de inmigración, visas, permisos de trabajo, requisitos, aplicaciones y mucho más!

Inmigrar a Canadá: haga clic aquí

Si usted quiere inmigrar a Canadá, hay algunas maneras diferentes de aplicar. Usted tendrá que decidir qué programa de inmigración funciona mejor para usted y su familia: haga clic aquí

Inmigración y ciudadanía. Aplicar para visitar, estudiar, trabajar o inmigrar a Canadá, solicitar la ciudadanía o una tarjeta de residente permanente, comprobar el estado de su solicitud o encontrar una forma: haga clic aquí

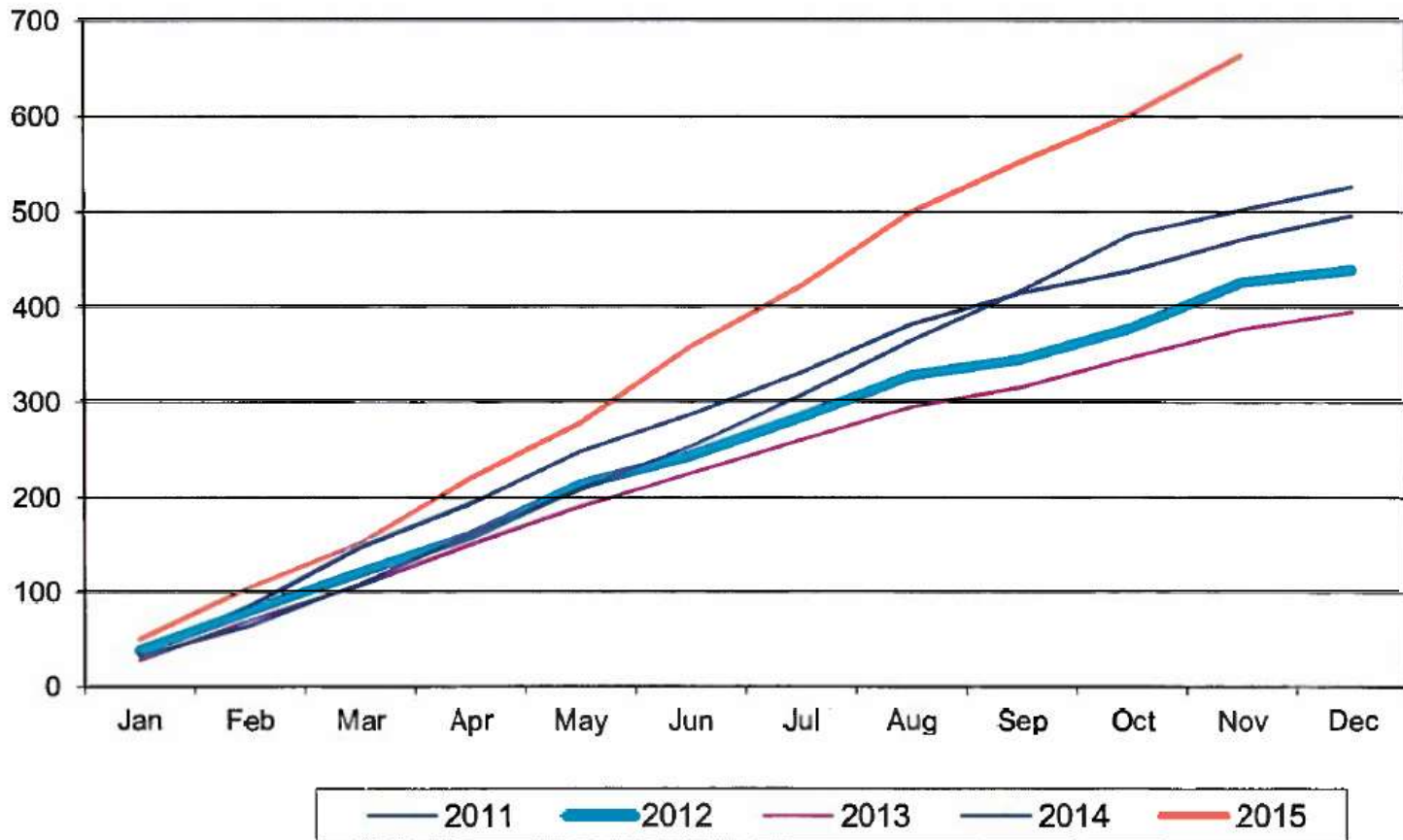
Business Enterprise Centre General Inquiries

General Inquiries (4-Year Comparative) Y-T-D Cumulative



Business Enterprise Centre Consultations

Consultations (5-Year Comparative) Y-T-D Cumulative



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Marketing Activities

- World Congress Industrial Bioproducts
- Global Petroleum Show
- North American Refining Conference
- European Group Visit – 20 visitors
- International Media Tour
- Intelligent Community – Top 7 application
- Society of Industrial and Office Realtors (SIOR)
Mail Out
- Community Branding
- Web site redevelopment – Launch December 2015

Intelligent Community Awards

Intelligent Community Forum

Winner



Competing for Top 7

Intelligent Community Forum

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Community

Lambton County, Ontario, Canada

Published Sunday, November 15, 2015

Lambton County extends from the shores of Lake Huron in the north to the Lake St. Clair in the south, a smaller body of water that feeds the Detroit River running between Detroit and Windsor, one of ICF's Top7 Intelligent Communities. Largely rural and thinly populated, it was the site of North America's first commercially drilled oil well in 1858. Petrochemical and refining industries are still its largest manufacturing and employment sector. The other mainstays of the economy are tourism-related commerce and agriculture.

Innovation Economy

This county of 129,000 is seeking to remake its future as an innovation.

International Chemical Media Tour, Nov 2015



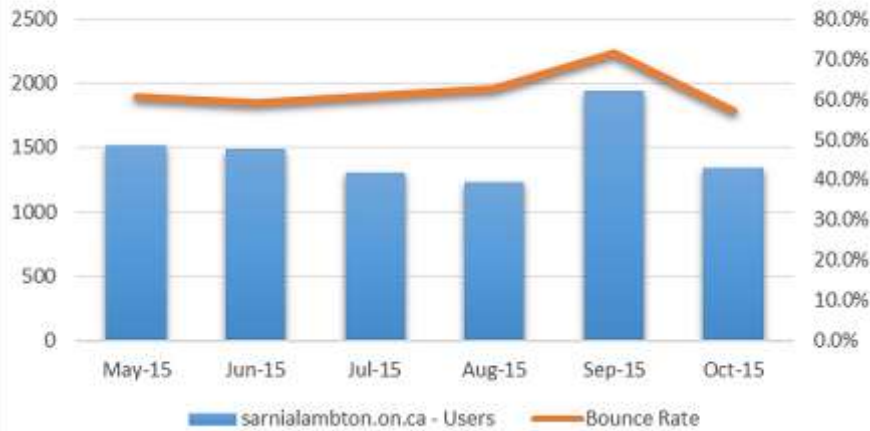
- 6 markets –
China, Brazil,
Germany, India,
Japan, UK
- 18 articles
- Total impressions
= 1.47 million

Government Relations



Internet Statistics

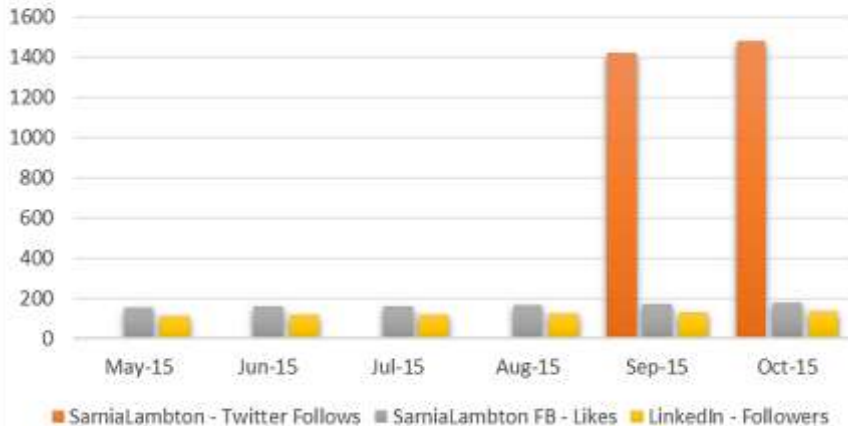
Website Statistics



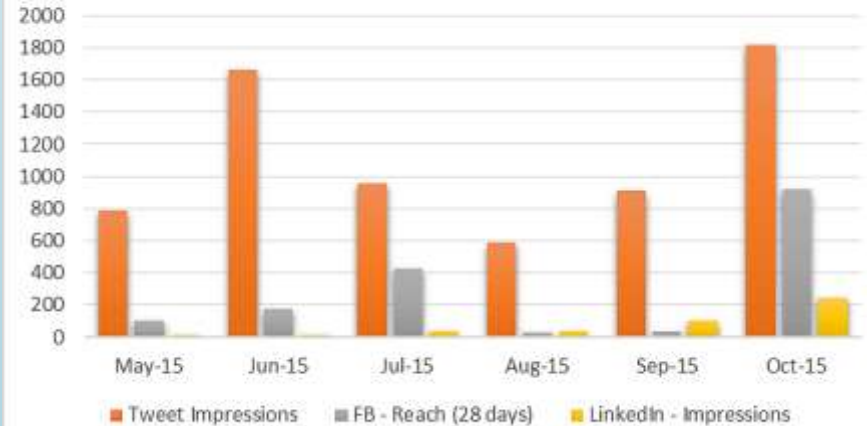
YouTube Channel Statistics



Social Following Statistics



Social Reach Statistics



Economic Partnership Boards, Committees and Support Positions

- Municipal economic development offices
- Bioindustrial Innovation Canada
- Sarnia-Lambton Chamber of Commerce
- RAIL
- Bluewater Technology Access Centre
- Tourism Sarnia-Lambton
- Sarnia-Lambton Physician Recruitment Task Force
- Young Professionals
- Lambton Toastmasters
- Going Green – County of Lambton
- Sarnia Lambton Workforce Development Board
- Association of Municipalities of Ontario - Immigration Committee
- County of Lambton Community Development Corporation - Advisory Board
- County of Lambton Agricultural Advisory Committee
- Lambton Newcomer Portal Committee
- Sarnia-Lambton Inter-jurisdictional Opportunities Committee
- Lambton County Creative Committee of Council
- Sarnia-Lambton Industrial Alliance
- Physician Recruitment
- Sarnia Accessibility Advisory Committee

Economic Partnership Staff



Chantelle Core
*Entrepreneurship/
Agri-rural
Development*



George Mallay
General Manager



Kathleen
Pretty
*Executive
Assistant*



Geoff Greening
*Market
Development
Consultant*



David Moody
*Project Leader,
Business Growth
Services*



Matthew
Slotwinski
*Entrepreneur-
ship-
Agricultural /
Rural
Development
Coordinator*



Jeanny Leung
*Receptionist/
Clerk*



Fraser Parry
*Business Counsellor,
Business
Enterprise
Centre*



Ted Zatylny
*Project Leader,
New Resident
Attraction and
Retention*

