Planning for an Integrated Economic Zone

Presentation at McMaster University Forum:
Increasing the Competitiveness of Regional Supply Chains

Marcy Burchfield, Vice President, Economic Blueprint Institute | July 8, 2020
Previous work by the Toronto Region Board of Trade resulting in Movement of Goods Council

Growth of e-commerce

TBD
Critical to Economy

- 1.4M direct jobs and $171B in annual GDP
- Need data to understand and remove the barriers to freight efficiency
- Unreliable transportation increases cost of doing business
- Region is well connected: Air, pipeline, rail, road or water.

Business & Consumer Impact

- Congestion costs $500-650M/year
- On average, congestion costs each household $125 per year
- Unknown cost of lost opportunity - of businesses who choose not to locate or invest less
- Improving movement of goods would reduce price people pay for goods and improve the competitiveness
Challenges for MoG

- Road congestion
- Last mile connectivity most costly part of the supply chain
- Lack of a multi-modal strategic vision for goods movement
- Conflict mitigation measures drive up costs
- Movement of good needs to be considered alongside the growth of municipalities

Infrastructure options

- Target investment in new projects such as the CN Rail Hub in Milton
- Union Station West becomes second regional hub
- Smart signal roll out across arterial and collector road network
Integrated Economic Zone

Our economy is a regional economy. Collectively, we address pain points + competitiveness issues.

- 4th Largest Metro in North America
- > 20% of Canada’s GDP
- 34 interconnected municipalities
- Globally Recognized Innovation Centre
The Economic Structure of a region describes the state, scale and make-up of the economy in a defined geography. Specifically, the extent and scale of production (in our case we use employment as a proxy) and its type, location and concentration.

Understanding the economic structure helps inform public debate about planning our economic zone and its future.
Economic Zone Planning – GGH
Warehousing and Transportation Jobs in PSEZs
AM work trips to Pearson Airport Hub PSEZ from across the Corridor

• **189,570** trips have the Pearson Airport Hub PSEZ as destination
• commuters come from Brampton, Mississauga and the City of Toronto
• **93%** of the total work trips to Pearson Airport Hub are by car, and only **6%** by Transit

<table>
<thead>
<tr>
<th>ORIGIN</th>
<th>AM WORK TRIPS</th>
<th>% AM WORK TRIPS</th>
<th>AUTO</th>
<th>TRANSIT</th>
<th>WALK</th>
<th>BICYCLE</th>
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<td>Rest of the GGH</td>
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<tr>
<td><strong>Grand Total</strong></td>
<td><strong>189,570</strong></td>
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<td><strong>93%</strong></td>
<td><strong>6%</strong></td>
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Movement of Goods
Unveiling and understanding the supply chain

• Toronto Region Board of Trade and Transport Canada are developing a data sharing partnership to analyse and map goods imported into Southern Ontario from abroad by air, road, rail and sea
• Analysis will allow us to understand origin, journey, final destination, time it takes for goods to flow into region
• Aggregate and link container contents to NAICS codes to understand and visualize supply chain flows for different sectors
Goals of Board of Trade & Transport Canada Partnership

- Understand historic supply chain data in order to improve predictability of supply chains
- Release through a dashboard near real time aggregate – weekly - analysis on the amount of goods moved into Southern Ontario.
- Identify factors such as “time to market” to aid supply chain planning
- Become a data partner and role model for data sharing transparency goals of federal government
- Improve the competitiveness of the Innovation Corridor
TRBOT/Transport Canada Project Progress

1. 2019 Discussions with Transport Canada
2. Spring and early summer 2020 Governance Project, and security protocols testing
3. Summer 2020 New multi-year Data Sharing Agreement
4. Fall – Winter – 2020 Data analysis and mapping beginning with Air and Marine data
5. Spring 2020 Report to Transport Canada & public release of analysis and mapping
Thank you
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