

APRC Canadian Automotive Manufacturing Industry Profile 2014

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Introduction

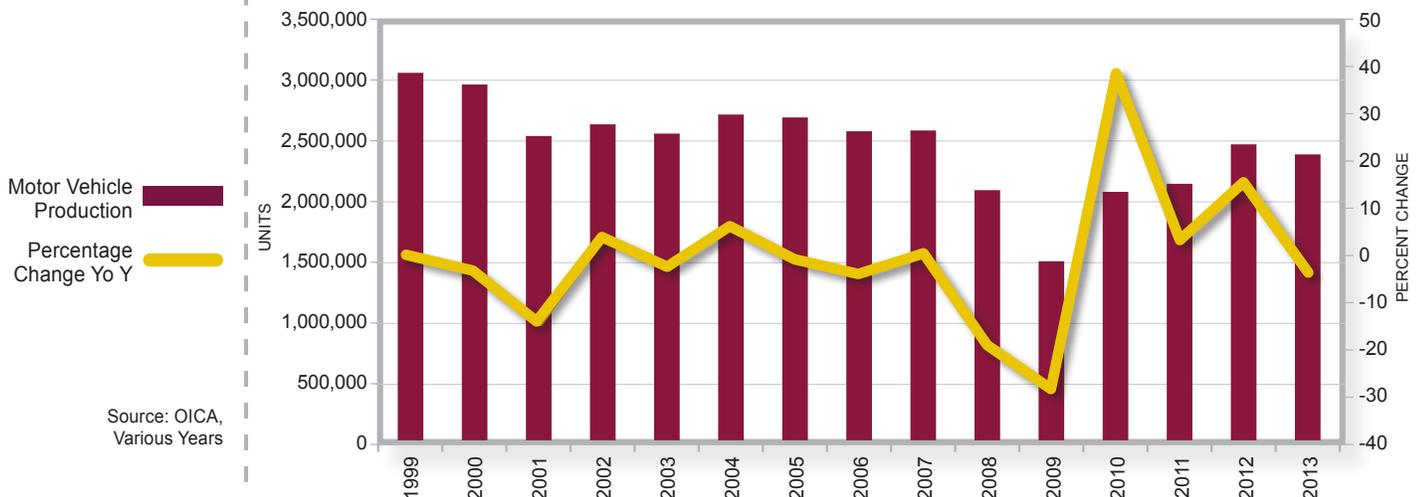
Every year, the APRC publishes a profile of the Canadian automotive manufacturing industry. These annual reports present key metrics, including contributions to GDP, employment, sales, trade, and a geographic profile of the industry. This particular report provides evidence of a sustained improvement in production and employment since 2009. The report also illustrates the extent to which automotive manufacturing is important to the Canadian economy, and particularly to communities in southern Ontario. However, it emphasizes some concerning trends, including a growing trade deficit in automotive parts, widespread plant closures, and production and employment levels that are much lower than those in the decade between 1997 and 2007.

Economic Contributions

The automotive manufacturing industry is an important part of the Canadian economy. It regularly contributes over \$20 billion to GDP, directly employs upwards of 120,000 people, and is second only to food products in terms of contributions to manufacturing GDP. Furthermore, automotive manufacturing provides significant multiplier and spin-off benefits. Estimates suggest that for every one assembly job, nine others are created in upstream and downstream activities (Stanford, 2014). By this estimation, an additional 280,000 Canadian jobs depend on automotive manufacturing.

The Canadian automotive manufacturing industry enjoyed a period of sustained prosperity between 1997 and 2007. At its peak, it produced over 3,000,000 vehicles annually (Figure 1), directly employed over 175,000 people (Figure 2), and regularly contributed over \$21 billion annually to Canadian GDP (Figure 3). Production, employment, and contributions to GDP began to decline sharply in the last quarter of 2007, almost an entire calendar year prior to the market crash of September 2008. This decline continued until the summer of 2009. Automotive manufacturing did not begin

Figure 1: Canadian Motor Vehicle Production 1999-2013



Source: OICA, Various Years

to recover in any significant fashion until late in 2009. Although this recovery has been sustained, employment and contributions to GDP in recent years are far lower than they were less than a decade ago.

Figure 2: Automotive Industry Employment in Canada, Jan 2001- Jun 2014

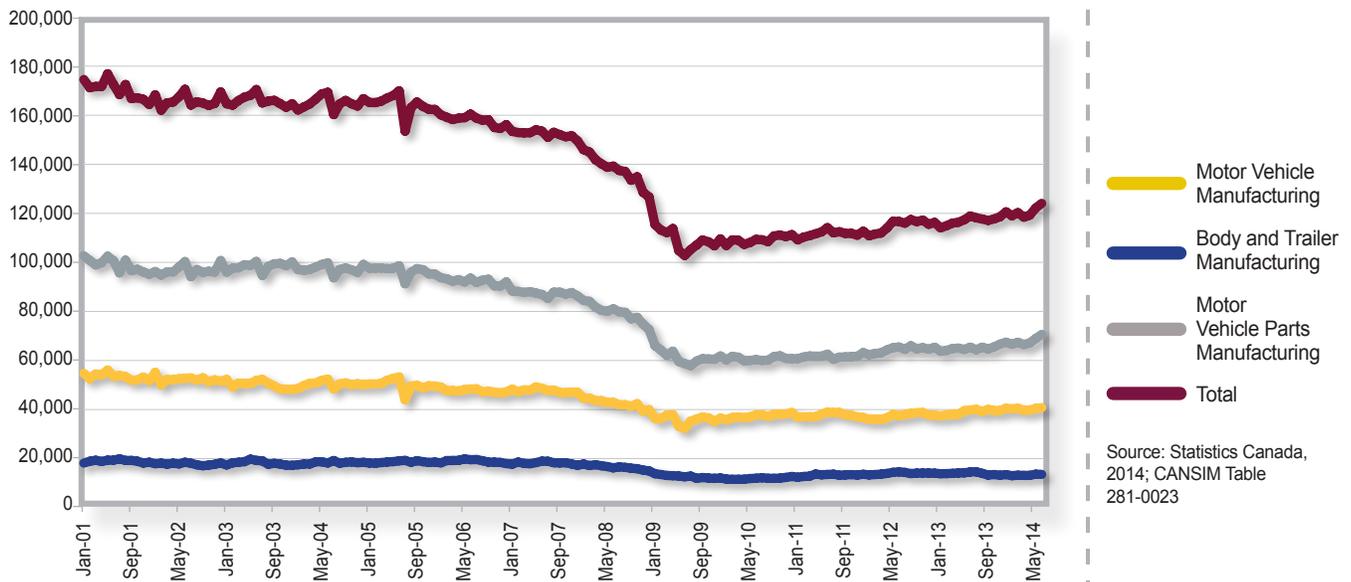
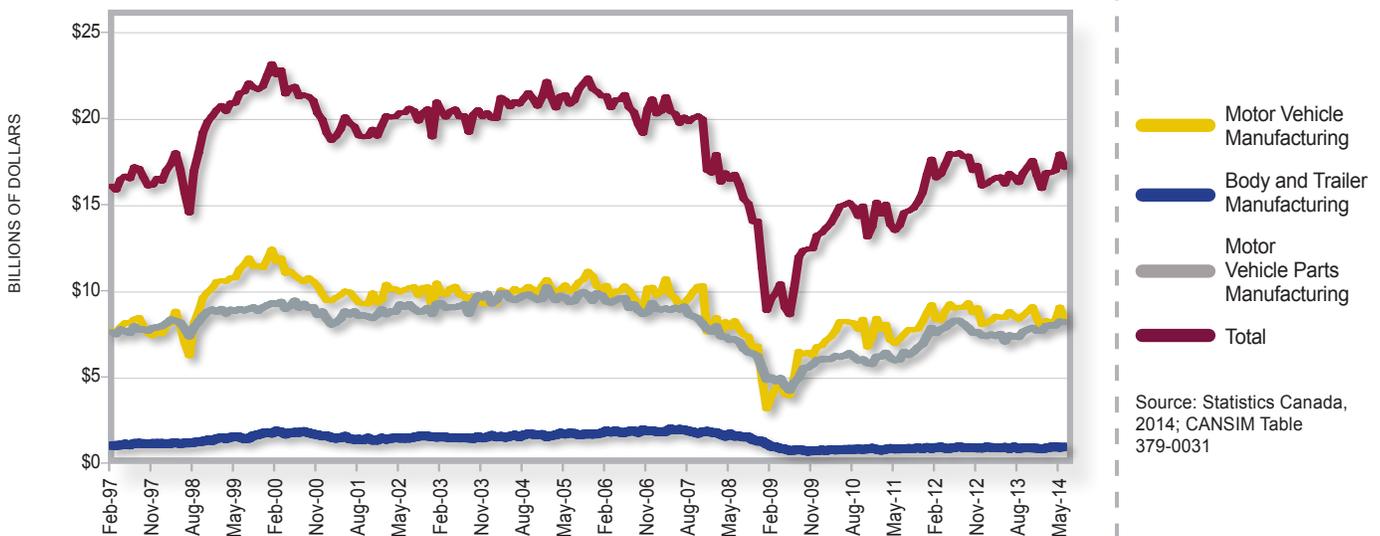


Figure 3: Automotive Manufacturing GDP, Jan 1997 – Jun 2014



The partial recovery of the automotive manufacturing industry that began in the second half of 2009 and continued until 2012 was led largely by assemblers. Toyota’s Woodstock, Ontario assembly facility, which began production late in 2008, played a significant role in the increases in employment and production that occurred between 2009 and 2012. The improvement of the automotive parts manufacturing sector lagged behind that of the assembly sector, and was not fully evident until early in 2012. Since this time, total annual contributions to GDP by assemblers and parts-makers have stabilized at around \$16 billion and production at around 2.4 million units annually.

Employment in automotive assembly has declined slowly since the late 2000, all the while interspersed with sharper drops that occurred as a result of assembly plant closures.

Source: Statistics Canada, 2014; CANSIM Table 379-0030.

The recovery of the automotive parts manufacturing industry varies considerably across diverse sub-sectors. Without question, every automotive parts manufacturing sub-sector contracted during the recent economic crisis. This economic contraction meant that in 2009, Ontario's major automotive parts sub-sectors contributed between 38 and 60 per cent of the GDP that they had contributed in 2004 (Table 1). Several auto parts sub-sectors have recovered appreciably since, in particular metal stamping, steering and suspension components, and other motor vehicle parts. Moreover, the electrical and electronic equipment sub-sector, which in 2009 contributed only 38 per cent of the GDP that it did in 2004, has witnessed an incredible recovery (in terms of contribution to GDP) since 2010, and in 2013 contributed 129 per cent of the GDP that it did in 2004. This may be indicative of fundamental changes to automotive electronics manufacturing in Canada, a subject being explored in detail by APRC researchers.

Table 1: Annual Contributions to Ontario GDP by Select Sub-Sector: 2004, 2009, and 2013

	2004	2009	% of 2004	2013	% of 2004
Engines and Engine Parts	\$1,902,600,000	\$1,146,900,000	60%	\$1,361,400,000	72%
Electrical and Electronic	\$299,200,000	\$115,100,000	38%	\$385,400,000	129%
Steering and Suspension	\$447,000,000	\$264,200,000	59%	\$432,700,000	97%
Wheels and Brake Systems	\$402,200,000	\$185,700,000	46%	\$131,300,000	33%
Transmission and Powertrain	\$1,135,900,000	\$445,400,000	39%	\$761,100,000	67%
Seating and Interior	\$1,384,100,000	\$681,800,000	49%	\$857,500,000	62%
Metal Stamping	\$1,557,500,000	\$797,900,000	51%	\$1,405,800,000	90%
Other	\$1,734,500,000	\$896,500,000	52%	\$1,651,100,000	95%

At the same time, several sub-sectors have not experienced any significant recovery. These include seating and interior components, transmission and powertrain components, and engines and engine parts. Lower rates of recovery have much to do with the closure of production facilities that serviced recently closed assembly plants in St. Thomas and Oshawa and the closure of GM's Windsor Transmission plant in July 2010. Wheels and brake systems manufacturing also fared particularly poorly, and in 2013 contributed only one-third of the GDP that it did in 2004. It is the only sub-sector to contribute less to GDP in 2013 than it did in 2009.

The recovery in production and contribution to GDP has outpaced the recovery in employment in automotive assembly and most (but not all) automotive parts sub-sectors. As of July 2014, over 40,000 people were employed in automotive assembly and over 83,000 in automotive parts manufacturing. In general, employment in automotive assembly has declined slowly since the late 2000, all the while interspersed

with sharper drops that occurred as a result of assembly plant closures. Employment in every automotive parts manufacturing sub-sector in Ontario decreased between 2004 and 2012 (Table 2; note: 2013 data is not yet available). When compared to 2004, seating and interior components, engines and engine parts, and transmission and powertrain components retained the highest proportion of employees. Wheels and brake systems manufacturing and electrical and electronic equipment retained the least.

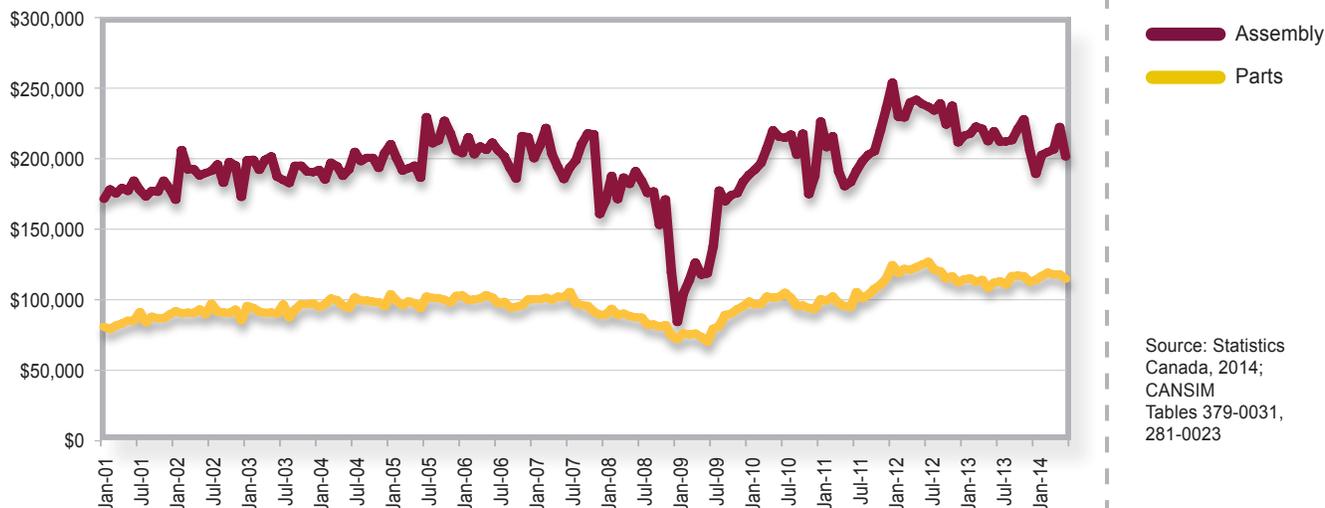
Table 2: Employment in Select Automotive Parts Sub-Sectors in Ontario: 2004, 2009, and 2012

	2004	2009	% of 2004	2012	% of 2004
Engines and Engine Parts	9156	6708	73%	7521	82%
Electrical and Electronic	6074	2354	39%	2154	35%
Steering and Suspension	3730	2543	68%	2479	66%
Wheels and Brake Systems	5638	1911	34%	1604	28%
Transmission and Powertrain	9690	5565	57%	7630	79%
Seating and Interior	13718	8640	63%	11683	85%
Metal Stamping	17846	7917	44%	13454	75%
Other	18837	9716	52%	11619	62%

Source: Statistics Canada, 2014; CANSIM Table 301-0006

On average, those employed in Canada’s automotive assembly and parts manufacturing facilities are very productive (Figure 4). The average annual GDP produced per employee in automotive assembly facilities consistently exceeds

Figure 4: Annual GDP/Employee, Automotive Assembly and Parts Manufacturing, Jan 2001 – Jun 2014



Source: Statistics Canada, 2014; CANSIM Tables 379-0031, 281-0023

The downward pressure on automotive parts manufacturing wages has much to do with the closure of dozens of large unionized parts manufacturing plants in the past decade.

\$200,000. This is extremely high, even when compared to other capital intensive manufacturing industries such as primary metals, aerospace, chemicals, and pulp and paper (see Sweeney, 2013). The increasingly high rates of average annual GDP produced per employee are attributable to the productivity and skills of Canadian automotive workers and increased rates of capital intensity.

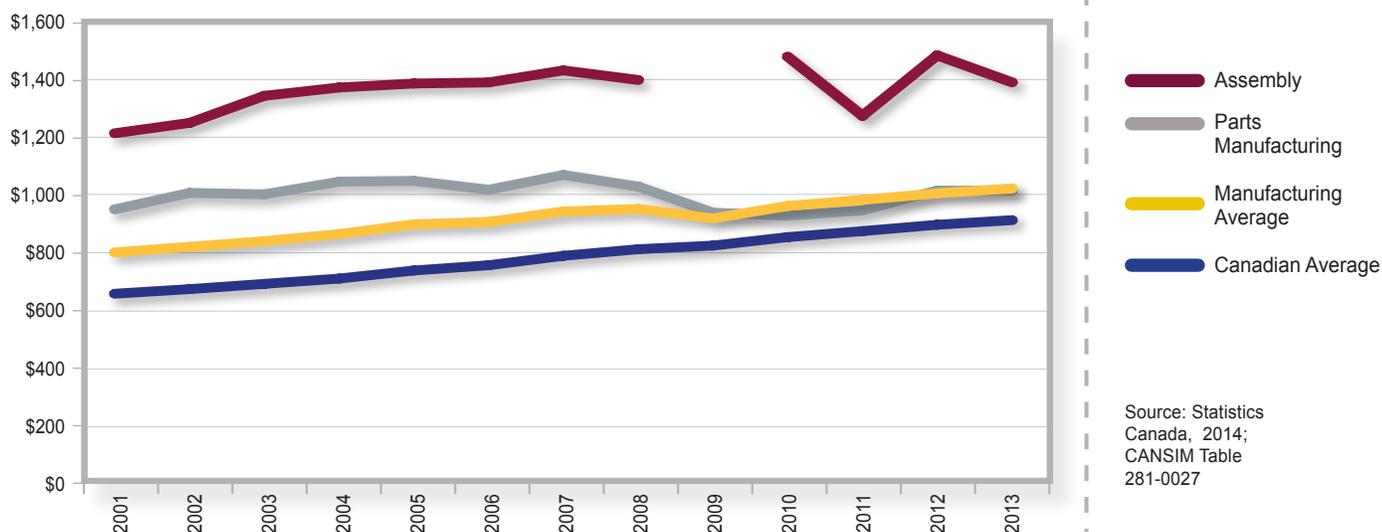
Average annual GDP produced per employee in automotive parts manufacturing is not quite as high, but has increased by almost 50 per cent, from just over \$80,000 in 2001 to almost \$115,000 in 2012. GDP produced per employee varies considerably across different automotive parts sub-sectors in Ontario (Table 3). This reflects the diversity amongst sub-sectors within this sector, especially between those that remain labour intensive versus those that are more capital intensive. In all but two sub-sectors, average annual GDP per employee increased. The largest increase was in electrical and electronic equipment – one of the sub-sectors that saw the greatest decrease in employment – where average annual GDP per employee increased by over 350 per cent. We suspect that this is due to a shift from low- to high-value added electrical and electronic equipment manufacturing, and possibly a fundamental restructuring of the electrical and electronic automotive parts industry. Steering and suspension components, wheels and brake system manufacturing, and other motor vehicle parts also witnessed significant increases in average annual GDP per employee. However, and interestingly, both the transmission and powertrain components and seating and interior components sub-sectors have experienced reductions in annual GDP per employee over the past decade. This raises questions regarding the relative competitiveness of these sub-sectors in an increasingly competitive environment.

Table 3: Annual GDP/Employee in Select Ontario Automotive Parts Sub-Sectors, 2004 and 2012

	2004	2012	% of 2004
Engines and Engine Parts	\$207,798.17	\$235,553.78	113%
Electrical and Electronic	\$49,259.14	\$174,883.94	355%
Steering and Suspension	\$119,839.14	\$174,989.92	146%
Wheels and Brake Systems	\$71,337.35	\$98,815.46	139%
Transmission and Powertrain	\$117,223.94	\$109,030.14	93%
Seating and Interior	\$100,896.63	\$76,298.90	76%
Metal Stamping	\$87,274.46	\$105,931.32	121%
Other	\$92,079.42	\$138,204.66	150%

Source: Statistics Canada, 2014; CANSIM Table 301-0006; 379-0030

The wages paid to automotive manufacturing employees are relatively high, and affirm the notion that automotive manufacturing jobs are ‘good’ jobs. In 2013, the average weekly earnings of automotive assembly employees were \$1,386.49 (Figure 5). This is \$400 more than the average weekly earnings of all manufacturing employees

Figure 5: Average Weekly Wages, 2001-2013

Source: Statistics Canada, 2014; CANSIM Table 281-0027

and almost \$500 more than the average of all Canadian workers. The average weekly earnings of automotive parts manufacturing employees were \$1,011.62. This is nominally lower than the average weekly earnings of all manufacturing employees and over \$100 higher than the average of all Canadian employees. However, the average weekly wages of automotive assembly and parts manufacturing employees have increased much more slowly than those in other sectors. Between 2001 and 2013 the average weekly wages of all Canadian employees increased by 38.7 per cent and the average weekly wages for manufacturing employees increased by 27.5 per cent (Table 4). In contrast, the average weekly wages of automotive assembly employees increased by only 14.5 per cent and those of automotive parts manufacturing employees increased by only 6.7 per cent. The downward pressure on automotive parts manufacturing wages has much to do with the closure of dozens of large unionized parts manufacturing plants in the past decade.

Table 4: Average Weekly Wages, 2001 and 2013

	2001	2013	% Increase
Automotive Assembly	\$1,210.65	\$1,386.49	15%
Automotive Parts Manufacturing	\$947.97	\$1,011.62	7%
Manufacturing Average	\$799.33	\$1,019.80	28%
Canadian Average	\$656.59	\$910.74	39%

Source: Statistics Canada, 2014; CANSIM Table 281-0027

Trade

For much of the period following the negotiation of the Autopact, Canada held a positive balance of trade in automotive products, with exports to the rest of the world exceeding imports. This positive balance of trade reached over \$20 billion in 1999. Canada's historic positive balance of trade was due to a significant surplus in exports of assembled vehicles (primarily to the US).

Although the value of the surplus has shrunk over the years, Canada continues to maintain a positive balance of trade in assembled vehicles (Figure 6). The surplus in assembled vehicles long exceeded Canada's deficit in automotive parts (Figure 7).

Figure 6: Imports and Exports (Assembled Vehicles), 1997-2013

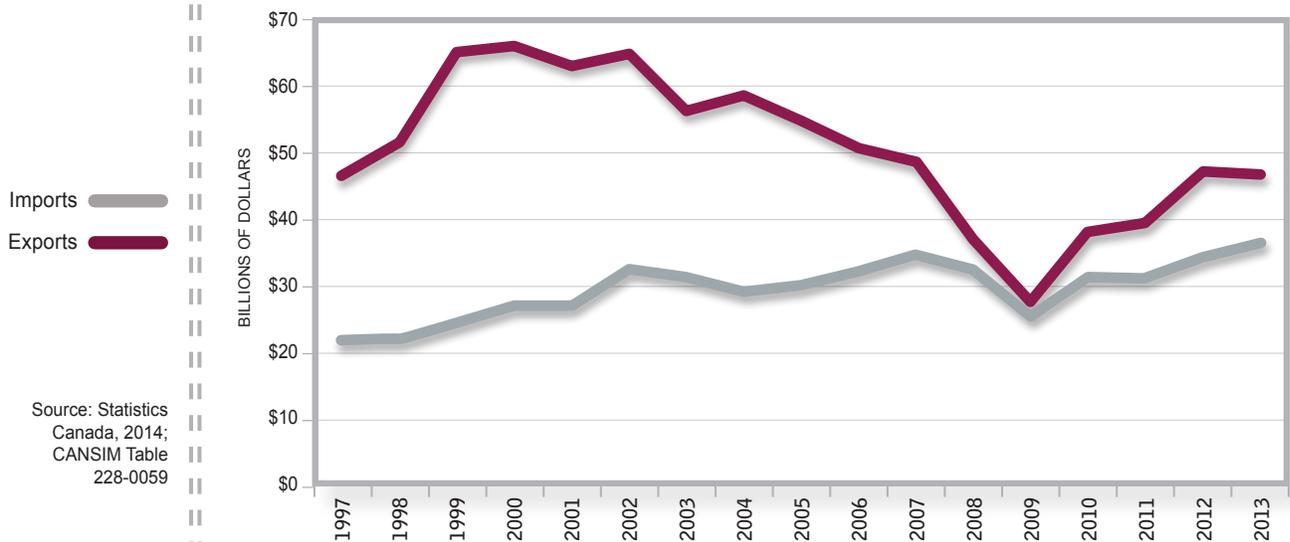


Figure 7: Imports and Exports (Automotive Parts), 1997-2013

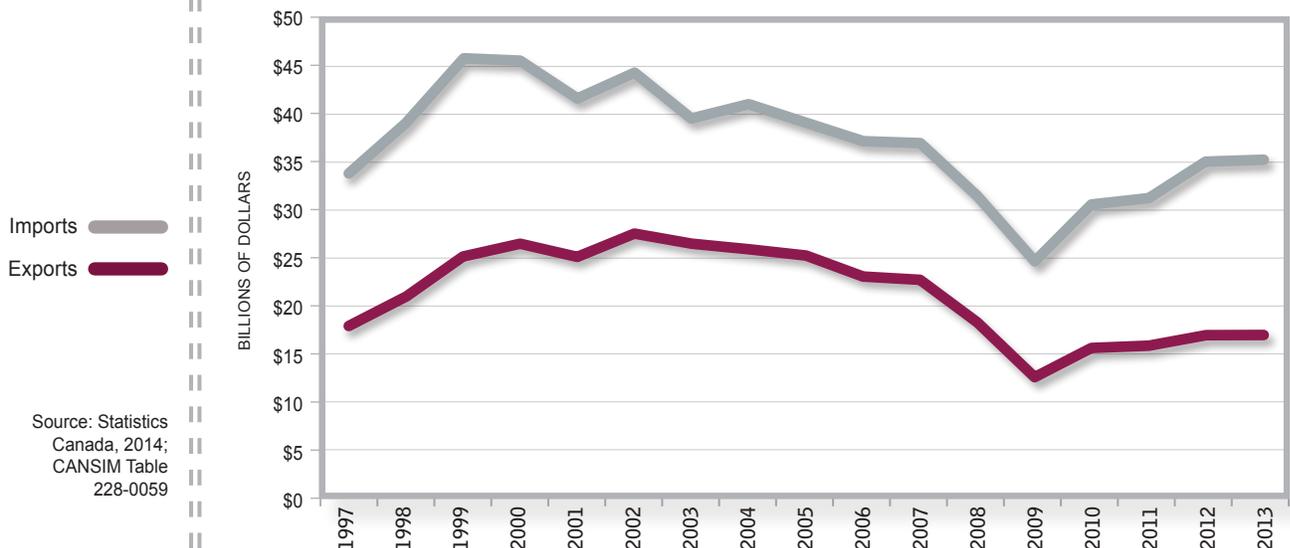
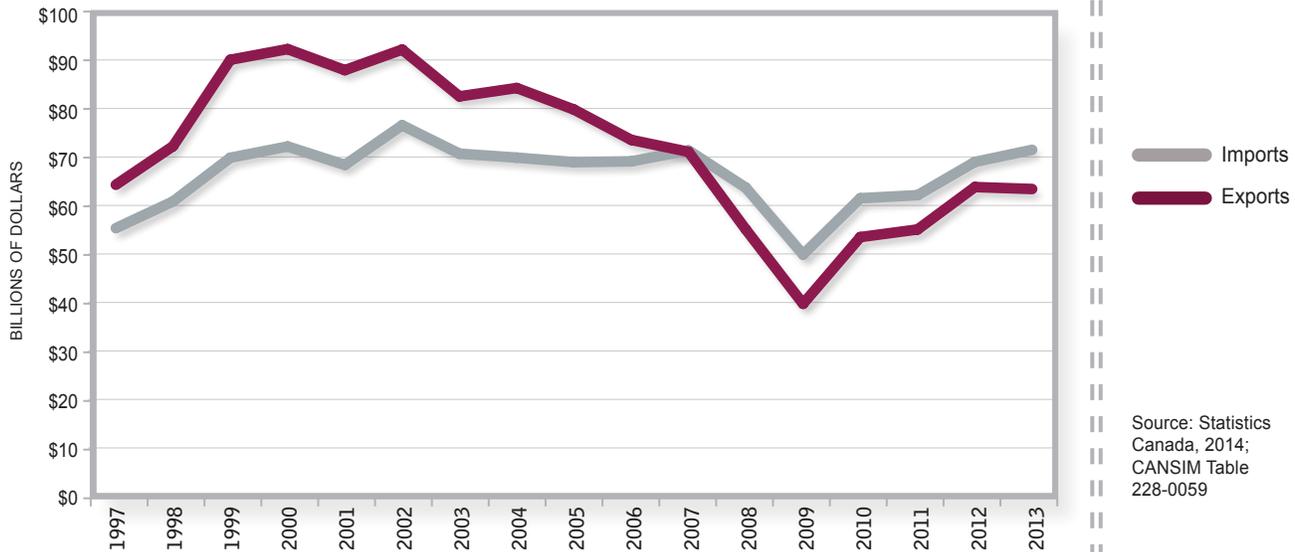


Figure 8: Imports and Exports (Total Automotive), 1997-2013

However, the deficit in automotive parts began to exceed the surplus in assembled vehicles in 2007 (Figure 8). Canada has experienced an overall trade deficit in automotive products since 2007. This deficit reached over \$10 billion in 2009, a sharp contrast to the \$10 billion surplus experienced in 2005. In the three years following 2009, the trade deficit shrunk by almost half. However, it grew again in 2013, reaching over \$8 billion.

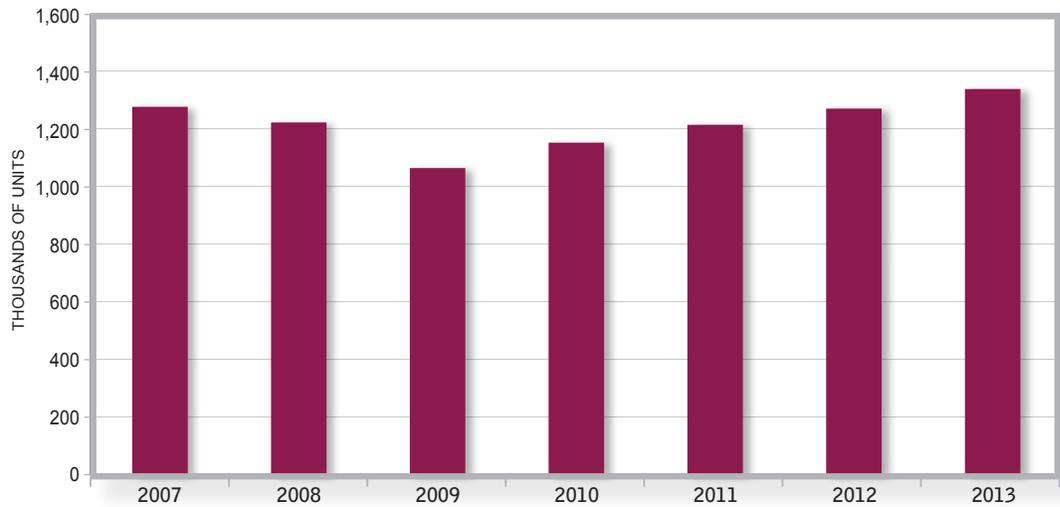
There are several reasons why this is likely to have occurred. The production and export of assembled vehicles improved between 2009 and 2012 at the same time that vehicle imports continued to increase alongside increased demand for vehicles. Overall exports of assembled vehicles have grown more rapidly than imports. This trend persisted notwithstanding the growing popularity of pickup trucks that are no longer produced domestically since GM closed its Oshawa truck assembly plant in 2009. A bigger contributing factor to the trade deficit lies in the automotive parts sector. The closure of over 200 parts manufacturing facilities in the past decade has led to a significant increase in automotive parts imports and the relative stagnation in parts exports. The characteristics of automotive parts manufacturing plants closed in Canada are discussed in further detail below, providing a more in depth understanding of the trade deficit in automotive parts.

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Sales

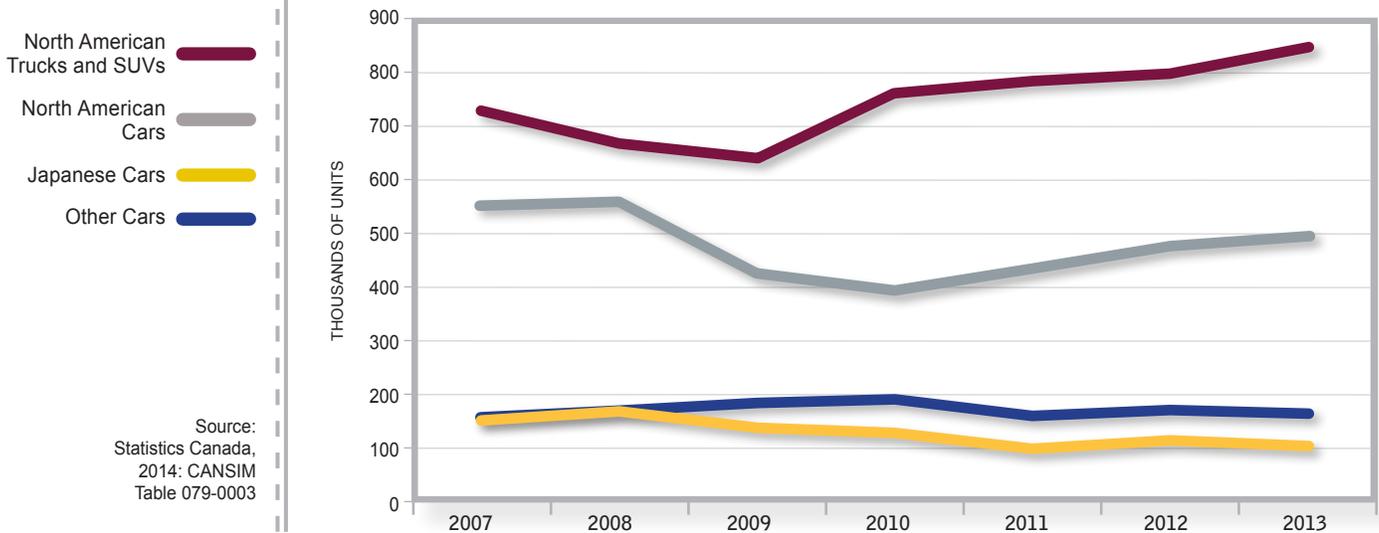
Canadian vehicle sales appear to have fully recovered from the economic crisis. In 2013, vehicle sales exceeded 1.3 million (Figure 9). Following record sales in August, there are expectations that sales will be even higher in 2014. This is due to a combination of pent-up demand, low interest rates, and strong dealer incentives (Keenan, 2014). Canadian consumers continue to show a preference for larger vehicles such as pickup trucks, minivans, and SUVs (Figure 10). The majority of these vehicles – and almost all pickup trucks – are made in North America. Canadians also purchased more vehicles made in North America and fewer made in Japan, Korea, or the EU. This is likely due to an increase in the number of models being produced by Japanese, German, and Korean manufacturers at their southern US and Mexican plants.

Figure 9: Canadian Vehicle Sales (Units), 2007-2013



Source:
Statistics Canada,
2014: CANSIM
Table 079-0003

Figure 10: Canadian Vehicle Sales (Units) by Nation of Origin, 2007-2013



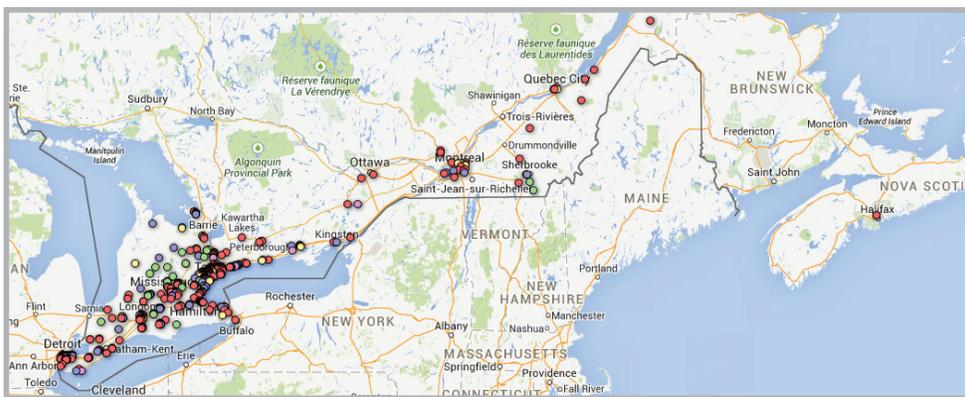
Source:
Statistics Canada,
2014: CANSIM
Table 079-0003

Geography and Production Location

The APRC maintains a database of automotive parts supplier plants in Canada. This database includes a wide range of plants, from large well-capitalized engine and powertrain production facilities owned by vehicle assemblers to small privately-owned tool, die, and mould-making shops. As of October 2014, the database included information on 637 individual supplier plants across Canada. In addition to the name and street address of each plant, the database compiles information related to parent ownership, nationality of ownership, product category, and if available or applicable, the number of employees, year established, major customers, and union representation.

The vast majority of supplier plants (590) are located in Ontario (Figure 11). Most are located within a corridor stretching between Peterborough and the Greater London Area or in Windsor-Essex. There are also several plants in eastern Ontario, Bruce-Grey County, and Chatham-Kent. The remainder are located in Québec (34), British Columbia (8), Alberta (2), Manitoba (2), and Nova Scotia (1).

Figure 11: Automotive Parts Supplier Plants in Canada



Canadian-owned firms operate 416 of the 637 supplier plants in Canada (Table 5). Of the remainder, 106 are US-owned, 52 are Japanese-owned, 23 are German-owned, and 40 are owned by firms based in 13 other nations. Chinese firms are playing an increasing role following the acquisitions of Wecast Industries by the Sichuan Bohong Group in 2012 and of Meridian Lightweight Technologies by the Wanfeng Auto Holding Group late in 2013.

Table 5: Automotive Parts Supplier Plants by Nationality

Nationality	Count	% of Total
Canada	416	65%
US	106	17%
Japan	52	8%
Germany	23	4%
Other	40	6%
Total	637	100%

Each supplier plant is assigned one of thirteen product categories (Table 6). The Tool, Die, and Mould category represents the largest number of supplier plants (91). However, a significant majority of these plants are quite small and employ fewer than 50 people. The Metal Stamping category represents the second highest number of plants (84). This category includes several very small and very large production facilities alike. These were followed by Motor Vehicle Plastic Parts (62), Seating and Interior Components (59), Transmission and Powertrain (51), Body and Chassis (48), and Engines and Engine Parts (35). Many of the plants in these categories are quite large and are owned by internationally-based firms or Canadian firms with an international reach.

Table 6: Canadian Automotive Parts Supplier Plants by Sub-Category

Sub-Category	Count	% of Total
Body and Chassis	48	8%
Electronic and Electrical Equipment	24	4%
Engines and Engine Parts	35	5%
Metal Stamping	84	13%
Motor Vehicle Plastic Parts	62	10%
Paint, Adhesives, and Coatings	22	3%
Seating and Interior	59	9%
Steering and Suspension	17	3%
Sub-Assembly	18	3%
Tool, Die, and Mould	91	14%
Transmission and Powertrain	51	8%
Wheels and Brake Systems	16	3%
Other	110	17%
Total	637	100%

The large number of supplier plants owned by small- and medium-sized Canadian firms also demonstrates how such enterprises continue to play an important role in the automotive industry supply chain in Canada.

The parent owners of Canadian supplier plants are diverse in size and scope (Table 7). Of the 637 supplier plants in Canada, slightly fewer than 25 per cent are owned by firms classified by the *Automotive News* as either Top 100 North American Suppliers or Top 100 Global Suppliers (Automotive News, 2012). Only 17 per cent of Canadian-owned supplier plants are operated by 'Top 100' firms. This is low when compared to US-owned supplier plants (of which 44 per cent, or 47 of 106, are owned by Top 100 firms), Japanese-owned supplier plants (40 per cent, or 21 of 52), German-owned supplier plants (35 per cent, or 8 of 23), and all other nations (35 per cent, or 14 of 40). The large number of supplier plants owned by small- and medium-sized Canadian firms also demonstrates how such enterprises continue to play an important role in the automotive industry supply chain in Canada, despite the increasing dominance of large international parts suppliers with a global reach in other automotive-producing nations that do not have domestic OEMs.

Table 7: Automotive Parts Supplier Plants Owned by 'Top 100' Firms, by Nationality

Nationality	Top 100	Total	% Top 100
Canada	70	416	17%
US	47	106	44%
Japan	21	52	40%
Germany	8	23	35%
Other	14	40	35%
Total	160	637	25%

Large suppliers with an international reach are more likely to be involved in some product categories than others (Table 8). Body and Chassis suppliers are the most likely to be owned by a 'Top 100' firm (73 per cent, or 35 of 48). However, this figure may be skewed somewhat when we consider the presence of Magna, an important body and chassis supplier and the parent owner of 21 such plants in Ontario (several of which are quite large). Seating and Interior Component suppliers are also very likely to be owned by a Top 100 firm (63 per cent, or 37 of 59). 'Follow sourcing' practices common to the industry, whereby large suppliers establish production facilities close to assembly plants, are most commonly found in this product category, hence the high proportion of plants owned by Top 100 firms. Some of these suppliers include Johnson Controls, Lear, Brose, Magna, Autoliv, Toyota Gosei, Toyota Boshoku, and Autoneum. Other categories with a high proportion of supplier plants owned by Top 100 firms

In addition to a database of supplier plants operating in Canada, the APRC maintains a database of supplier plant closures since the early 2000s.

Table 8: Automotive Parts Supplier Plants Owned by 'Top 100' Firms, by Product Category

Category	Top 100	Total	% Top 100
Body and Chassis	35	48	73%
Electronic and Electrical Equipment	1	24	4%
Engines and Engine Parts	19	35	54%
Metal Stamping	7	84	8%
Motor Vehicle Plastic Parts	13	62	21%
Paint, Adhesives, and Coatings	3	22	14%
Seating and Interior	37	59	63%
Steering and Suspension	5	17	29%
Sub-Assembly	0	17	0%
Tool, Die, and Mould	3	91	3%
Transmission and Powertrain	23	51	45%
Wheels and Brake Systems	9	18	50%
Other	14	108	13%

The most striking feature of the supplier plants closed since 2002 is that a disproportionately high number were US-owned.

include Engines and Engine Parts (54 per cent, or 19 of 35), Wheels and Brake Systems (50 per cent, or 9 of 18), and Transmission and Powertrain Components (45 per cent, or 23 of 51). The supplier plants least likely to be owned by a Top 100 firm are Sub-Assembly (none), Tool, Die, and Mould (less than 3 per cent, or 3 of 91), and Electrical and Electronic Equipment (4 per cent, or 1 of 24).

In addition to a database of supplier plants operating in Canada, the APRC maintains a database of supplier plant closures since the early 2000s. Currently, this database includes information on 211 supplier plants closed between 2002 and 2014. Plant closure data was collected from several sources, including media reports, company reports and publications, auction notices, union publications, and government documents. Unfortunately, there are likely many smaller supplier plants that have closed during this time for which information is currently unavailable. This is particularly the case for smaller plants that closed during the early 2000s. However, the plant closure database has captured the vast majority of the most significant automotive supplier plant closures during this time.

The most striking feature of the supplier plants closed since 2002 is that a disproportionately high number were US-owned (Table 9). Of the 211 supplier plants closed in Canada during this time, over 42 per cent were US-owned (88 of 211). Of the remainder, 49 per cent were Canadian-owned (103), 2 per cent were Japanese-owned (4), 3 per cent were German-owned (7), and 4 per cent were owned by firms from other nations (9). Furthermore, the plants closed by US-owned firms were larger on average than those closed by Canadian-owned firms. In fact, of the 88 US-owned supplier plants closed in Canada since 2002, 55 per cent (48) were owned by Top 100 firms such as Dana, Honeywell, ITW, TI Automotive, Lear, Johnson Controls, Borg-Warner, Dura Automotive, Tower International, and PGW. Several other supplier plants closed during this time were also owned by large US-based firms that may have previously held a place as a Top 100 supplier but whose parent company had ceased operations entirely (e.g. Collins and Aikman, Oxford Automotive, Progressive Moulded Products).

Table 9: Automotive Parts Plants Closures, 2002-2014, by Nationality

Nationality	Count	% of Closed
Canada	103	49%
US	88	42%
Japan	4	2%
Germany	7	3%
Other	9	4%
Total	211	100%

A significant proportion of these US-owned plants were established during the 1960s and 1970s and produced lower value-added products in order to take advantages of relative advantages in Canadian labour costs and satisfy US requirements under the Auto Pact. Many were also unionized. This stands in sharp contrast to most of the Japanese-owned supplier plants, which were established in the 1990s or 2000s.

However, many of the US-owned plants were antiquated and became uncompetitive following the end of the Auto Pact in 2001, the appreciation of the Canadian dollar, and declining production volumes between 2007 and 2009. Based on the APRC plant closure database, the average age of US-owned Top 100 suppliers at the time of closure was 43.2 years, and the average date that they were established was 1964.

The plant closure database also identifies a geographic shift in the Canadian automotive manufacturing industry. In general, there has been a shift away from production in peripheral regions and regions without assembly facilities. Several communities in near northern Ontario (e.g. Sudbury), the Muskokas (e.g. Bracebridge), and Grey County (e.g. Owen Sound) have lost nearly all of their supplier plants. The Southwestern Ontario communities of Chatham-Kent, Sarnia, and Wallaceburg also lost a large proportion of their supplier plants, despite their relative proximity to automotive clusters in the Windsor and London areas. At the same time, a disproportionate amount of supplier plants in the eastern GTA closed (including Durham Region and Scarborough), despite the presence of GM's Oshawa Assembly complex, the northeasternmost automotive assembly plant in North America. Most of the plants that remain in the eastern GTA are owned by large US and Canadian firms (e.g. Lear, Johnson Controls, Martinrea, Inteva, Woodbridge Foam) that service the nearby GM plant almost exclusively. What the eastern GTA lacks are the diverse networks of second- and third-tier parts suppliers and mould-makers prevalent in other areas of Ontario where OEM assembly and powertrain production facilities are located (e.g. Windsor, western GTA, Kitchener-Waterloo and Cambridge). This may be a consequence of the closure of GM's truck assembly plant in 2009 and recent uncertainty regarding the future of one of the two remaining car assembly plants.

The plant closure database also identifies a geographic shift in the Canadian automotive manufacturing industry. In general, there has been a shift away from production in peripheral regions and regions without assembly facilities.

Conclusion

The Canadian automotive manufacturing has partially recovered from the turmoil of the 2008-9 financial crisis. While it is unlikely that the industry will soon employ as many people or contribute as much to GDP as it did in the late 1990s and early 2000s, it appears to have stabilized to some degree. Recent hiring at Ford, Toyota, and Chrysler assembly plants and GM's decision to delay the planned closure of the Oshawa Consolidated plant offer some optimism for the industry moving forward. However, the trade deficit, which after shrinking for three straight years grew in 2013 (and it is expected that it will grow again in 2014) is an issue that the APRC continues to examine, especially considering the strength of vehicle sales in recent years and the closures of parts supplier plants. Canada's diminished share of North American production is also an ongoing cause for concern.

Conclusion

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Statistics Canada (2014) CANSIM Table 379-0030. *Gross domestic product (GDP) at basic prices, by North American Industry Classification System (NAICS), provinces and territories, annual (dollars). 2007 constant prices*.

Statistics Canada (2014) CANSIM Table 379-0031. *Gross domestic product (GDP) at basic prices, by North American Industry Classification System (NAICS), monthly (dollars). 2007 constant prices*.