Monitoring Trade War Exposure and Impact at the Community Level

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Presented by the CDP Team (Michel Frojmovic and Mike Ditor)



Community Data Program



Enabling communities across Canada to measure and track local well-being

Outline

- 1. Context
- 2. Current initiatives monitoring trade war exposure and impact
- 3. CDP data holdings and initiatives
- 4. Next steps







Context – U.S. tariffs on Canadian exports

Context – U.S. tariffs on Canadian exports

- Reduced demand for Canadian exports
- Reduced production
- Unemployment
- Lower GDP growth or decline
- Increase in inflation





Source: National Statistical Agencies, TD Economics.

Existing initiatives to measure exposure and impact at the community level





Measuring exposure and impact - IRPP

Institute for Research on Public Policy

<u>Measuring community workforce exposure to U.S.</u> <u>exports</u>

Indicators

- Workforce exposure / Industry exposure
- Share of workers exposed
- Number of workers exposed
- Census Divisions proxy for communities





By census division

Click on a census division on the map to learn more

CDUID	Census division name	Largest census subdivision	Industry	Number of workers in all industries	Number of workers in goods exporting industries	Share of local workforce	Average industry exposure	Workforce exposure
3532	Oxford, Ont.	Woodstock	Total	56,445	22,605	40.096	28%	11.4%
3537	Essex, Ont.	Windsor	Total	171,705	53,530	31.296	3296	9.8%
3531	Perth, Ont.	Stratford	Total	40,140	15,725	39.2%	25%	9.8%
3523	Wellington,	Guelph	Total	120,020	38,765	32.3%	2996	9.4%
3534	Elgin, Ont.	St. Thomas	Total	42,160	13,780	32.796	2896	9.3%
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Measuring exposure and impact - IRPP

Institute for Research on Public Policy

<u>Measuring community workforce exposure to U.S.</u> <u>exports</u>

Indicator: Workforce exposure

- Workforce exposure: Average *Industry exposure*, weighted for share of employment in each industry.
- Industry exposure: Value of an industry's U.S. exports as a share of output in 2021 for goods-exporting industries, and 0 for all other industries.



Measuring exposure and impact - IRPP

Institute for Research on Public Policy

<u>Measuring community workforce exposure to U.S.</u> <u>exports</u>

Employment data: 2021 Census table 98-10-0592-01

Industry data: Supply and use tables 12-10-0100-01 Output by sector and industry 36-10-0488-01





2. Their size and order is determined by this metric

Select one of three possible options

Workforce exposure
Share of workers
Number of workers

 You can filter by select industries or by those that rely the most on U.S. exports (top industries)

All goods exporters included by default. Click the button on the right to reset



Current selection

Industry: Oil and gas extraction



4. Learn more about a census division's exposure to U.S. exports

Click on a square to get started

Canadian Urban Institute

Tariff Impact Tracker

- Nine indicators at the Census Metropolitan Area (CMA) level
- Month-over-month OR Yearover-Year comparisons







Canadian Urban Institute

Tariff Impact Tracker

Jobs and Business

- Number of People Employed
- Number of El recipients
- Number of Active Businesses







Canadian Urban Institute

Tariff Impact Tracker

Prices and Consumer Spending

- Consumer Price Index
- Retail Sales
- Real-time Local Business

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Canadian Urban Institute

Tariff Impact Tracker

Investment

- Number of building permits
- Investment in Building

Construction

Commercial Rent Price Index







Measuring exposure and impact – Canadian Chamber of Commerce (CCC)

U.S. Tariff Exposure Index combines

- U.S. Trade Intensity = Goods exports to U.S. as share of GDP, 2021
- U.S. Export Dependence = U.S. exports share of total goods, 2023

1	Rank	City	Tariff Exposure Index	Rank	City	Tariff Exposure Index
	1	Saint John, NB	131.1%	20	Chilliwack, BC	-1.2%
	2	Calgary, AB	81.6%	21	Red Deer, AB	-3.8%
	3	Windsor, ON	61.7%	22	Sherbrooke, QC	-5.6%
	4	K-C-W*, ON	43.0%	23	Montréal, QC	-5.7%
	5	Brantford, ON	27.8%	24	Edmonton, AB	-6.6%
	6	Guelph, ON	24.0%	25	Kingston, ON	-6.9%
	7	Saguenay OC	23.5%	26	Québec, QC	-7.6%
	8	Hamilton ON	19.8%	27	Toronto, ON	-8.4%
	ğ	Trois-Rivières OC	18.9%	28	Kelowna, BC	-9.9%
	10	Lethbridge AB	15.7%	29	Ottawa - Gatineau, ON/QC	-10.9%
	11	Belleville - Quinte West ON	14 494	30	Moncton, NB	-11.170
	12	Drummonduillo OC	14.470	31	Vancouver BC	-11.3%
	12	Thunder Bay, ON	12.170	32	St John's NELD	-14.5%
Canadian	13	Thunder Bay, ON	11.2%	34	Saskatoon SK	-10.0%
Janaanan	14	Osnawa, ON	11.0%	35	Halifay NS	-21.076
CFD Network	15	Abbotstord - Mission, BC	7.6%	36	Victoria BC	-40.1%
CLD HELWOIN	16	St. Catharines - Niagara, ON	5.4%	37	Regina SK	-40.9%
	17	Peterborough, ON	4.5%	38	Winnipeg, MB	-50.6%
	18	Fredericton, NB	4.2%	39	Nanaimo, BC	-60.6%
	19	Barrie, ON	0.7%	40	Kamloops, BC	-78.1%
				41	Sudbury ON	-82.0%

Measuring exposure and impact – Canadian Chamber of Commerce (CCC)





U.S. Tariff Exposure Index ranking for Thunder Bay (Ranks 13 of 41 cities)

Choose a CMA:



 Goods exports from Thunder Bay to the U.S.

 \$602.4 Million (Rands 32 of 41 cilles)
 \$4,607 per capita (Rands 32 of 41 cilles)

 7.4% of GDP (Rands 31 of 41 cilles)
 99.3% of total exports (Rands 31 of 41 cilles)

 Thunder Bay's population
 99.3% of total exports (Rands 34 of 41 cilles)

 130,752 (Rands 34 of 41 cilles)
 Number of exporters from Thunder Bay to the U.S.

 90 (Rands 34 of 41 cilles)
 90 (Rands 40 of 41 cilles)

 Thunder Bay's GDP (Rands 30 of 41 cilles)
 Thunder Bay's GDP per capita

 \$7.3 Billion (Rands 30 of 41 cilles)
 \$56,670 (Rands 17 of 41 cilles)

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Dashboard

- Tariff Exposure Index
- U.S. Trade Intensity = Goods exports to U.S. as share of GDP, 2021
- U.S. Export Dependence = U.S. exports share of total goods, 2023
- Value of goods exported
- Value of goods exported per capita
- Value of goods exported as % of GDP (trade intensity)
- Goods exported to U.S. as % of total exports
- Population
- Number of exporters to U.S.
- GDP
- GDP per capita



Measuring exposure and impact – Canadian Chamber of Commerce (CCC)

U.S. Tariff Exposure Index ranking for Thunder Bay

Thunder Bey

Choose a CMA:

(Ranks 13 of 41 cities)

CMA map for Thunder Bay, as highlighted in red



Goods exports from Thunder Bay to the U.S.



Dashboard

- <u>Gross domestic product (GDP) at basic prices (Table: 36-10-0468-01)</u>
- Trade in goods by exporter characteristics (Table: 12-10-0137-01)



Measuring exposure and impact – Trever Tombe, University of Calgary

Share of All Jobs "Exposed" to U.S. Tariffs (2019)



• Provincial-level analysis

Value added in exports, by industry table (12-10-0100-01)



Source: Own calculation from Statistics Canada data table 12-10-0100-01

Measuring exposure and impact – Trever Tombe, University of Calgary

Total Indirect Jobs Attributable to Exports to the U.S. (2019)



^{• &}lt;u>Provincial-level analysis</u>

Value added in exports, by industry table (12-10-0100-01)



Source: Own calculation from Statistics Canada data table 12-10-0100-01

Measuring exposure and impact – Trever Tombe, University of Calgary

Income from Exports to the U.S. as a Share of GDP (2019)



- Provincial-level analysis
- Value added in exports, by industry table (12-10-0100-01)



Source: Own calculation from Statistics Canada data table 12-10-0100-01

Measuring exposure and impact – Canadian Centre for Policy Alternatives

- <u>Demographic analysis by industry, using 2021</u> <u>Census</u>
- Value added and Employment in selected industries
- Disaggregate by gender, race, immigrant status
- National level analysis
- Similar data available at municipal level



Industries highly exposed to US trade by value of trade and size of workforce engaged in US export, 2022

Value added due to foreign demand from US		Jobs due to foreign demand from US	
Total industries (x 1,000)	\$469,262,673	Total industries	2,420,430
Mining, quarrying, & oil and gas extraction	\$154,452,439	Manufacturing	641,271
Manufacturing	\$107,227,640	Professional, scientific & technical services	345,400
Professional, scientific & technical services	\$36,717,316	Transportation and warehousing	252,532
Wholesale trade	\$34,953,277	Wholesale trade	209,074
Transportation & warehousing	\$33,430,486	Administrative and support, waste management	167,868
Finance, insurance, real estate	\$26,498,302	Finance, insurance, real estate	140,775
Utilities	\$13,145,273	Information & cultural industries	99,607
Administrative and support, waste management	\$12,730,675	Mining, quarrying, & oil and gas extraction	97,992

Source: Statistics Canada. Table 12-10-0100-01 Value added in exports, by industry, provincial and territorial • Get the data • Created with Datawrapper

Measuring exposure and impact – Canadian Centre for Policy Alternatives

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- Trade in Goods by Exporter Characteristics
 - Number of exporting establishments and value of goods exports
- Trade in Goods by Importer Characteristics
 - Number of importing establishments and value of goods imports
- <u>https://www.yorklink.ca/trade/#tariff-news</u>
- Data Source:
 - Statistics Canada, International Accounts and Trade Division, custom tabulation





YORK REGION BUSINESS EXPORTS/ IMPORTS PROFILE 2023 DATA



Census Division

- 2-Level NAICS
- 3-Level NAICS for select manufacturing sub-sectors
- USA vs non-USA destination/origin

EXPORTS VALUE

© B \$14.5 B Total exports of good and services annually



Breakdown of Export Establishments by Primary Sector, 2023

Primary Sector (2-Level NAICS)	Number of Export Establishments	To Val	otal Exports lue (x \$1,000)
11 Agriculture Forestry Fishing and Hunting	34	\$	86,205
23 Construction	129	\$	100,027
31 to 33 Manufacturing	1,006	s	11,920,047
41 Wholesale Trade	888	s	1,777,112
44 and 45 Retail Trade	268	\$	267,135
48 and 49 Transportation and Warehousing	99	s	82,761
54 Professional Scientific and Technical Services	209	\$	229,578
All Other (multiple sectors)*	259	s	131,108
Total Exports	2,892	\$	14,593,972

*All Other (sectors under \$80 million): 21 Mining and Oil and Gas Extraction; 22 Utilities; 51 Information and Cultural Industries; 52 Finance and Insurance; 53 Real Estate, Rental and Leasing; 55 Management of Companies and Enterprises; 56 Administrative and Support, Waste Management and Remediation Services; 61 Educational Services; 62 Health Care and Social Assistance; 71 Arts, Entertainment and Recreation; 72 Accommodation and Food Services; 81 Other Services (except Public Administration); 91 Public Administration.

Share of Export Destination Country





Source: Statistics Canada, International Accounts and Trade Division, custom tabulation for York Region Economic Strategy, 2025



Census Division

- 2-Level NAICS
- 3-Level NAICS for select manufacturing sub-sectors
- USA vs non-USA destination/origin



IMPORTS VALUE

© B \$45.4 B Total Imports



Breakdown of Import Establishments by Primary Sector, 2023

Primary Sector (2-Level NAICS)	Number of Importer Establishments	Total Imports Value (x \$1,000	
11 Agriculture Forestry Fishing and Hunting	84	s	92,147
23 Construction	788	s	317,860
31 to 33 Manufacturing	1,489	s	7,198,194
41 Wholesale Trade	2,472	s	34,384,639
44 and 45 Retail Trade	1,660	s	1,798,059
48 and 49 Transportation and Warehousing	193	s	131,402
51 Information and Cultural Industries	82	5	49,378
53 Real Estate Rental and Leasing	225	s	121,309
54 Professional Scientific and Technical Services	760	s	642,414
56 Administrative and Support Waste Management and Remediation Services	237	s	107,484
62 Health Care and Social Assistance	245	s	95,263
71 Arts Entertainment and Recreation	99	s	24,547
72 Accommodation and Food Services	190	\$	19,868
81 Other Services (except Public Administration)	404	s	433,946
All Other (multiple sectors)*	177	s	46,650
Total Imports	9,105	s	45,463,161

*All Other (multiple sectors under 80 establishments each): 21 Mining and Oil and Gas Extraction; 22 Utilities; 52 Finance and Insurance; 55 Management of Companies; 61 Educational Services; 91 Public Administration.

Census Subdivision

- USA vs non-USA destination/origin
- Total # importers / exporters
- Total \$ value of goods



BUSINESS EXPORTS

Exports Value by Local Municipalities in York Region and Destination Country, 2023

Local Municipalities (largest to smallest total exports value)	Exp	ports Value (x \$1,000)	Exj	oorts Value to .S. (x \$1,000)	Ex Nor	ports Value to n-U.S. (x \$1,000)
Vaughan	\$	8,001,205	\$	6,785,799	s	1,215,407
Markham	\$	2,823,847	\$	2,000,849	\$	822,998
Newmarket	\$	1,280,156	5	1,129,993	s	150,163
Richmond Hill	\$	1,245,872	5	866,515	\$	379,357
Aurora	\$	515,631	\$	446,551	\$	69,079
King	\$	277,316	5	215,235	s	62,081
East Gwillimbury	\$	252,573	\$	251,548	s	1,025
Whitchurch Stouffville	\$	110,123	5	74,633	s	35,490
Georgina	\$	87,249	\$	75,081	\$	12,168
Total Exports	\$	14,593,972	\$	11,846,203	s	2,747,768

Exporter Establishments by Local Municipalities in York Region and Destination Country, 2023

Local Municipalities (largest to smallest total exporter establishments)	Number of Exporter Establishments	Exports to U.S.	Exports to Non-U.S.
Vaughan	1,265	1,103	409
Markham	709	532	326
Richmond Hill	416	294	206
Newmarket	172	151	65
Aurora	128	113	51
Whitchurch Stouffville	83	72	18
King	61	53	17
East Gwillimbury	34	32	7
Georgina	29	24	7
Total All Industry Exporter Establishments	2,897	2,374	1,106

Measuring exposure and impact – What are the gaps?

Limitations of previous examples

- Most data on trade and its impacts are available at provincial or CMA level
- <u>Value added in exports table</u> (12-10-0100-01) valuable data at provincial level
- Data lag often in years
- What indicators can point to impacts and exposure at the community/municipal level?
- What industries are considered exposed?





CDP data for measuring exposure and impact

Impact	Source	Frequency	Description
Industry disruption	Canadian Business Counts Statistics Canada	Bi-annual	# of export-dependent businesses by NAICS and employee size range – CSD and CT level
Industry disruption	Canadian Importers Database, Innovation Science & Economic Dev Canada	Annual	Import-dependent cities: name and number of importers, total value of imports
Exposed workers	Census of Population Statistics Canada	5 years	Employment in export-dependent industries by NAICS
Unemployment	El Statistics, ESDC via STC	Monthly	EI beneficiaries by sex and age group
Unemployment	Labour Force Survey Statistics Canada	Monthly	Employment & unemployment rate by CMA/CA & Self-contained Labour Areas-SLAs

CDP data for measuring exposure and impact

Impact	Source	Frequency	Description
Business & Personal Bankruptcy	Insolvency statistics – Office of the Superintendent of Bankruptcy	Monthly	Business and consumer bankruptcies and proposals by FSA
Personal debt	Credit report characteristics, TransUnion	Annual	Average consumer and average mortgage debt at 6-digit postal code
Local economic activity	Building permits Statistics Canada	Monthly	Count (units) & value (\$000) of new residential and non-residential construction - building types and the type of work done at CSD level

Where to go from here?

- Looking into custom order from Statistics Canada Trade Division
 - Total value of exports and Total number of businesses grouped by US vs. Non-US
 - Exports by NAICS classification
 - Census Subdivision/Census Division level
- Tariff dashboard to summarize impact and exposure?
- Composite index?
- Map provincial level measures to municipal level?
- Importers' database





Thanks for listening!

www.communitydata.ca

information@communitydata.ca



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