

The Significance of Craft Beer to Ontario's Economic Ecosystem



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Glossary

- Brewery:** A facility that produces beer
- Breweryless producer:** A licensed producer of beer that does not own their own brewing facility or equipment, and contracts out the actual production of beer to a different company, known as a co-packer.
- Bricks-and-mortar brewery:** A licensed producer of beer that has substantial ownership or control of their own brewing facility and equipment.
- Contract brewer:** See Breweryless producer.
- Co-packer:** A manufacturing facility that produces beer on contract for other companies, but does not produce any of their own beer.
- Craft beer:** Beer from a small producer than does not exceed 400,000 hectolitres annually
- Hectolitre (hL):** A hectolitre is equal to 100 litres
- Microbrewery:** A brewery that produces less than 49,000 hectolitres of beer annually

Results at a Glance

90%



of Ontarians have a bricks-and-mortar **craft brewery in their community**

77%

of bricks-and-mortar breweries are outside the GTA

1 in 4



Ontarians could walk from their home to an Ontario craft brewery

More than
5 million people

visit Ontario craft breweries annually

Over
1.8 million tourist visits



In the last decade, the number of Ontario **craft breweries** has grown by **4.5X**

With the number of employees having grown by **5.6X**

11,510 people



total jobs from craft beer activity

31,000 Ontarians

live in a household **supported by the industry**

Ontario craft breweries have generated a total

\$685 million

in **GDP annually**



BUT...



Success is tied to the policies and regulations in Ontario. Challenges stem from Ontario's own regulatory environment, the risks of breweryless producers and the dominance of internationally-owned brewing companies.

For continued growth, Ontario's bricks-and-mortar craft beer producers need a fair chance to compete.

Economic Impact



Craft brewing is the fastest growing segment of the Ontario manufacturing sector, and becoming an increasingly important component of the provincial economy. Bricks-and-mortar craft breweries are in the communities of over 90% of Ontarians, who on average consume over 10L of craft beer annually (among those who drink). There are 414 businesses in the Ontario craft beer industry, of which 339 are locally established brick-and-mortar craft brewers, with 77% of them outside the GTA.

There are 4.5 times as many companies producing craft beer in Ontario in 2022 as there were 10 years ago in 2012. Bricks-and-mortar craft breweries employ 14 people on average and have invested more than \$500 million in Ontario in the past decade.

Ontario craft breweries generate \$685 million of economic activity annually. More than 11,000 people are employed as part of this activity, and 31,000 Ontarians live in a household supported by the industry.

The economic activity supported by craft brewers, through their purchases of goods and services from farms and other suppliers (e.g. packaging, logistics) amounts to more than \$450 million annually. Of the total economic activity, \$248 million of it annually occurs in rural communities.

More than 5 million people visit Ontario craft breweries annually, of which over 1.8 million are tourist visits. These tourists, who generally spend at least 10% more on average than tourists who do not visit a craft brewery, generate \$211 million of economic activity annually. This is made possible because of the localization of 'bricks-and-mortar' breweries across the province.



Ontario craft
breweries generate
\$685 million
of economic activity,
including tourism of
\$211 million

Ontario Regulatory Environment and Market Access



While the number of craft breweries increased during the pandemic, the industry faces rapidly increasing supply chain costs and competitive challenges. These are related to the regulatory environment and market access issues in Ontario.

Taxation

The Ontario craft brewery basic beer tax rose almost three times faster than the basic beer tax for the internationally-owned brewing companies since 2010. This limits craft brewers' ability to invest in their breweries, employees, and communities.

Breweryless Producers

Ontario is home to a growing number of breweryless producers. These companies, which rely on contract brewing arrangements with co-packers, do not make the same investments in the province's economy and communities as 'bricks-and-mortar' craft breweries. Breweryless producers do not contribute to tourism or local communities. They enjoy the same tax benefits and market access as 'bricks-and-mortar' craft breweries but contribute four times less as much per employee to the province's economy. If breweryless producers were to replace bricks-and-mortar breweries, 57% of craft brewing jobs and \$200 million in tourism-related economic activity would be at risk.

Market Access

Ontario's beer retailing and distribution channels are controlled by large companies and government agencies. Their practices privilege internationally-owned brewing companies at the expense of local craft breweries. This restricts consumer choice and limits the ability of Ontarians to buy locally-made beer.

The current regulatory environment limits the competitiveness of Ontario craft breweries, as well as their ability to operate at full capacity, innovate, and realize a return on investment.



If Breweryless producers replace Ontario bricks-and-mortar breweries, **57% of direct craft brewing jobs would be at risk and about \$200M of tourism-related economic activity would be gone.**

Growth Potential



Ontario craft beer production per capita is low when compared to the United States. Ontario produces 62% less craft beer per capita than neighbouring states (e.g. New York, Michigan), and would rank 33rd in per capita production among all 50 states. This suggests that there is a latent demand for local craft beer in Ontario. A modernized regulatory system and better market access would help Ontario craft breweries grow and satisfy this demand. Over the next 10 years, this growth could result in an additional:

- \$2.35 billion in economic activity;
- 1,000 jobs in craft brewing and related industries;
- \$380 million in capital investment.

The current regulatory environment limits the competitiveness of Ontario craft breweries, as well as their ability to operate at full capacity, innovate, and realize a return on investment.



Modernizing the
regulatory system
could create

**\$2.35 billion
in economic
activity**

Considerations



The dominance of internationally-owned brewing companies and the emergence of breweryless producers create challenges to further growth, competitiveness and sustainability of Ontario bricks-and-mortar craft brewers.

The Government of Ontario should consider the potential economic benefits of modernizing the regulatory framework governing craft brewing and beer retailing. This should be done so as not to privilege internationally-owned brewing companies and breweryless producers at the expense of locally-owned 'bricks-and-mortar' craft breweries and Ontario beer consumers.



The future success of Ontario's craft brewers, **who provide numerous strong jobs, community support and help to drive local economies,** cannot be taken for granted.



1.0

Introduction



Ontario is home to a diverse selection of craft beer manufacturers, most of which are small breweries and are independently owned. Among the smallest are microbrewers which produce less than 49,000 hL (4.9 million litres) of beer annually, and are not owned by companies that exceed this production level. While craft brewers make beer with traditional ingredients like malted barley, they also frequently innovate with non-traditional ingredients for added distinctiveness.

The Ontario craft brewing industry has had exceptional growth over the last decade and has been the fastest growing manufacturing segment in Ontario in the decade prior to the pandemic (Sweeney, 2020).

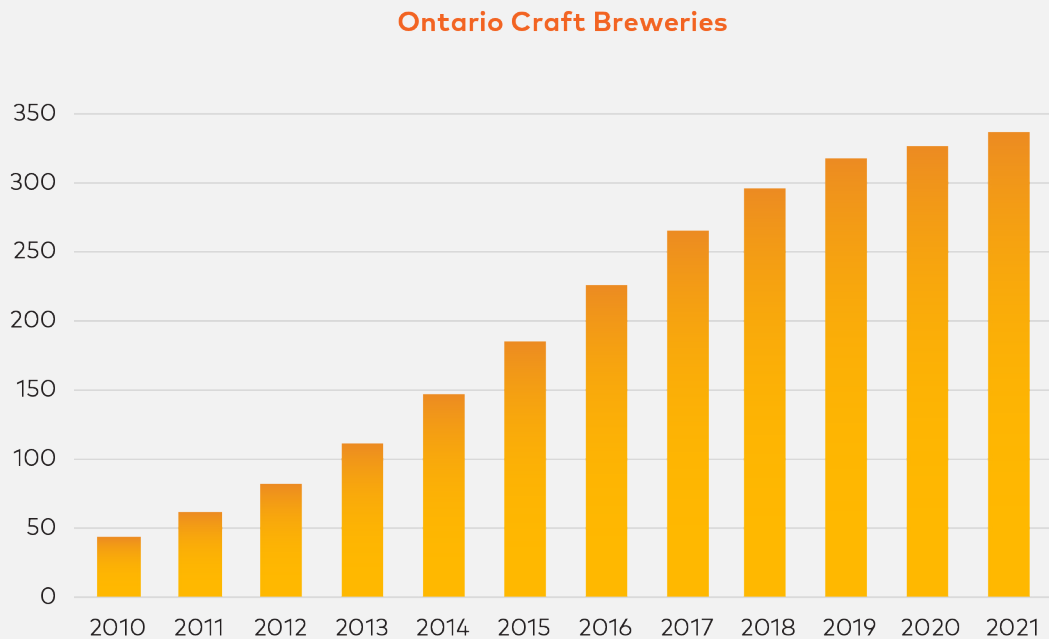
There are now 414 companies in Ontario producing craft beer, 339 bricks-and-mortar facilities, and 75 breweryless companies, compared to less than a 100 brewers in 2012, a growth of approximately 4.5 times.

Given the labour intensiveness of local craft beer production, the number of employees has grown by approximately 5.6 times over the past 10 years with 4,680 Ontario employees working directly in the industry. Craft brewing represents over 75% of all brewery employees in Ontario.

While bricks-and-mortar craft breweries differ in size from local brew-pubs to bigger production brewers with nationwide distribution, they are often very involved in their communities with individualistic approaches to connecting with their customers. Over 90% of Ontarians live within 15 kilometers of a craft brewery, and over 25% of Ontario's population live within 2 kilometers of one.

Although heavily impacted by the coronavirus pandemic, craft beer still represents the growth segment of the beer brewing industry and currently represents about 11% of the Ontario market. Among adults who consume alcohol, the average Ontarian drinks over 10L of craft beer every year. Over the last several years, the number of craft breweries in the province has increased, as has the share of domestically-produced beer sales.

Figure 1: **Growth in the number of Ontario craft breweries since 2010**



Notwithstanding the significant growth of the Ontario craft brewing industry, there have been challenges, which include the impact of COVID-19 and legislative and policy issues that continue to persist. These challenges threaten the future growth of craft beer production in Ontario and will require consideration by policy makers.

The objective of this study is to independently and objectively quantify and describe the role and importance of Ontario craft brewers in Ontario's socio-economic ecosystem, including regional breakdowns. These contributions include all the economic activity generated from:

1. The production of craft beer
2. Indirect and induced economic contributions from the purchase of factors of production from other industries and the spending of wages paid to employees
3. Tourism supported by bricks-and-mortar breweries

The 2022 economic contributions are reported in terms of Gross Domestic Product (GDP) and jobs supported in Ontario and regionally.

The study also considers the challenges and risks to the industry, as well as the potential growth of the craft brewing industry in Ontario.

2.0

Craft Brewers and Ontario's Economic Ecosystem



2.1 Economic activity

Craft breweries in Ontario play an important role in the ecosystem of the provincial economy. There are currently 339 bricks-and-mortar brewers in Ontario producing craft beer with over 77% of the companies located outside the GTA, having an average of 14 employees. There are also 75 breweryless producers who contract out the production of their beer to one on these bricks-and-mortar facilities. The regional distribution of breweries represent a return to the localization of beer production, and an emphasis on regional sustainability. Over the last decade, bricks-and-mortar breweries have made over \$500 million dollars capital investment with 279 new breweries established.

Craft breweries, and associated activities, support \$685M of economic activity annually and 11,510 Ontario jobs. This economic contribution includes the economic activity directly generated by operations and investment activities of craft brewers ('direct effects'), as well as the economic activity generated indirectly through business-to-business transactions with other industries that provide goods and services to craft brewers ('indirect effects'). In addition, it includes the spending activity of people whose incomes are supported by craft brewer's economic activities in Ontario ('induced effects'), and other benefiting industries such as tourism.

Table 1: **Total economic activity supported by the craft brewing industry in 2022**

Economic Metric	# of Jobs	GDP (\$M)
Direct economic activity	4,680	\$228
Indirect and induced economic activity	4,050	\$246
Tourism-related economic activity	2,780	\$211
Total	11,510	\$685

Ontario craft breweries generate \$685 million of economic activity annually. They employ about 8,730 people directly and indirectly, and 31,000 Ontarians live in a household supported by the industry.¹ These businesses purchase goods and services from farms and other suppliers (such as packaging and logistics). More than \$248 million of the economic activity generated annually occurs in rural communities.

As seen in Table 1, the direct economic activity that results from the craft beer industry is only one-third of the total activity supported. The remaining GDP support arises from the indirect and induced economic activity which is discussed in Section 2.1.1, and tourism, which is discussed in Section 2.1.2.

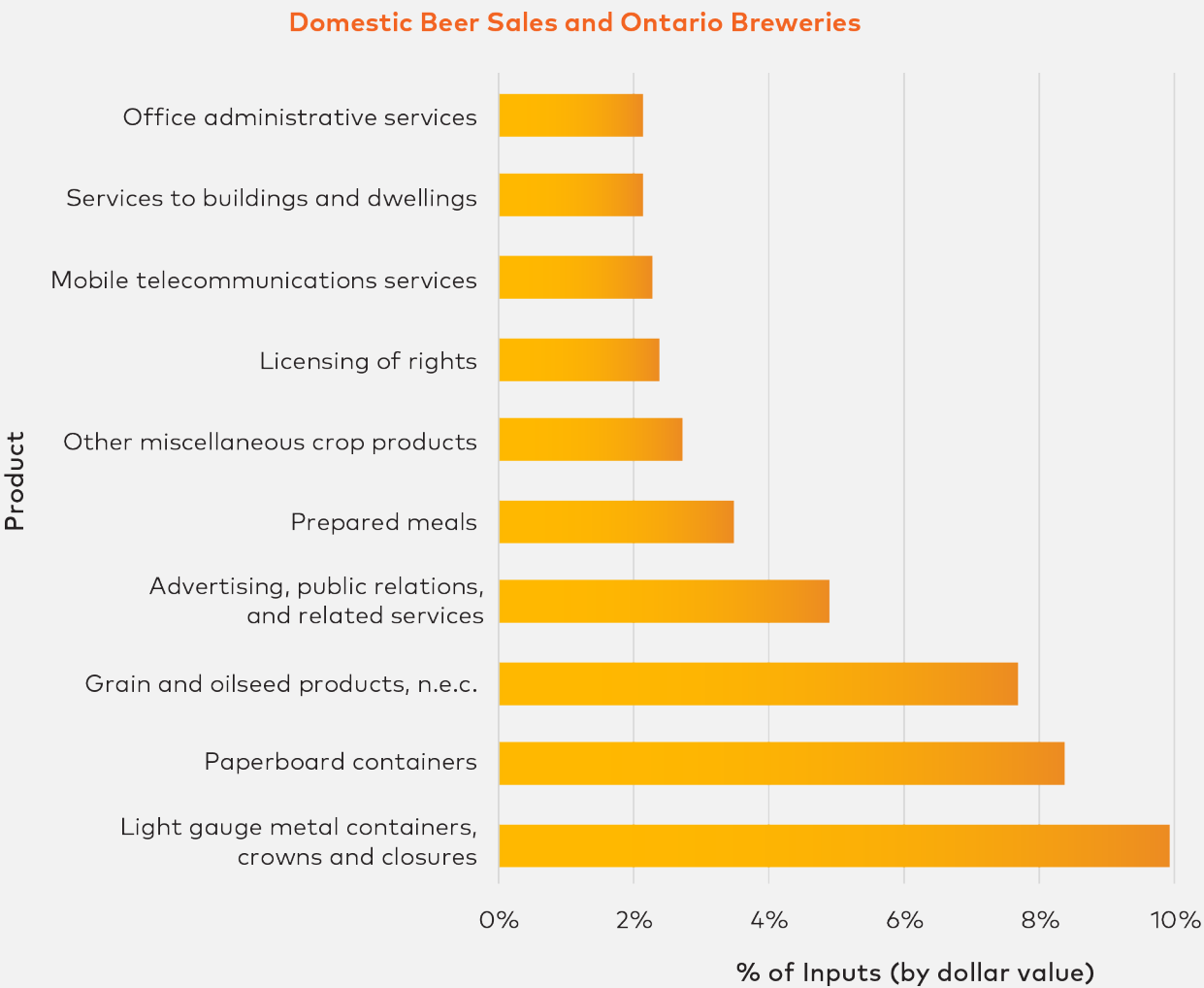
¹ Based upon the distributions of supported employment and household characteristics such as number of members

2.1.1 Indirect and Induced Benefits of Craft Breweries

Of the \$685M of economic activity, \$246M arises from businesses either serving the craft brewing industry (indirect economic activity) or as a result of employees spending the wages they received to support other businesses (induced economic activity). While craft breweries directly employ over 4,680 Ontarians, an additional 4,050 Ontarians are supported through these indirect and induced economic effects.

The industries that received the largest indirect economic benefit from the production of craft beer in Ontario include manufacturing, providing containers and packaging material, and agriculture, providing the required grains.

Figure 2: Primary goods and service inputs to beer production



2.1.2 Tourism Impact of Craft Breweries

The remaining \$211 million of economic activity supported by the craft beer industry arises from tourism.² Tourism is a key sector of Ontario's economy supporting 9% of Ontario's jobs, and over 5% of its employment income (Statistics Canada, 2020). However, the tourism sector includes a variety of industries such as restaurants, hotels, travel and transportation services and entertainment. As each component cannot exist on its own, bricks-and-mortar craft breweries play an important part of tourism's economic ecosystem.

In Ontario, more than 5 million people visit craft breweries each year. With a higher concentration of craft breweries per population outside of the GTA, craft breweries not only contribute to many rural economies through the operation of the brewery but also play a role in attracting tourists. Ontario tourism data and surveys show that approximately one-third of visitors (over 1.8 million visits) of craft breweries are not from the local area bringing critical tourist spending to many communities (MNP LLP, 2022; John Dunham & Associates, 2019).

When a tourist visits a craft brewery, additional spending occurs on transportation, accommodation, and other food and entertainment in the area. An extra economic benefit of craft beer tourism is that, compared to tourists who do not visit a brewery, they tend to spend at least 10% more per trip (Stone, et al., 2020; Benton & Bowers, 2019).

The net result is of the total economic activity supported by the craft beer industry, \$211M of economic activity (30% of the total) can be attributed to tourism in Ontario. Of the total 11,510 jobs, over 2,700 are in the tourism sectors, excluding breweries.



² A tourist trips is an overnight trip or a same day trip of a distance that is 40km and over.

2.1.3 Regional economic contributions

The size of the contribution of the craft beer industry depends on each region's economic base and on the type of investments that are present in each region. The following tables summarize the key contributions of craft breweries in the Greater Toronto Area (GTA), Southwestern Ontario, Eastern Ontario, Central Ontario and Northern Ontario in 2022. Appendix C includes additional regional details, as well as the list of the specific municipalities included in each region.

As shown in Table 2, bricks-and-mortar craft breweries exist throughout the province, with 77% of them outside the GTA. The GTA has 45% of the provinces breweryless producers, but only 23% of the bricks and mortar breweries.

Table 2: **Distribution of craft beer producers and economic benefits in Ontario**

Region	# of Producers	# of Bricks & Mortar Producers	# of Breweryless Producers	Total # of Jobs	Total GDP (\$M)
Southwestern Ontario	134	113	21	1,890	\$150
GTA	112	78	34	5,010	\$309
Eastern Ontario	102	91	11	1,930	\$81
Central Ontario	42	36	6	2,380	\$131
Northern Ontario	24	21	3	300	\$12
Ontario³	414	339	75	11,510	\$685

All across the province, the craft beer industry provides almost \$290 million in wages directly to its employees, including over \$7 million in Northern Ontario, supporting hundreds of jobs.

While over three quarters of the breweries exist outside of the GTA, over 45% of the economic activity arises within the GTA. This is due to the concentration of larger craft breweries within the region which produce over half of the craft beer in the province. Province-wide, the average output per brewery is just over 2,500 hL annually. With the larger craft breweries in the GTA, the average output of breweries in Northern and Eastern Ontario is less than 1,000 hL annually.

These small brewery operations present an excellent opportunity for the sector to grow. However, as discussed in Section 3.0, they face many headwinds to growth, including a disproportionate increase in taxes, and access barriers to the market.



Bricks-and-mortar craft breweries have invested more than \$500 million in Ontario in the past decade

³ Totals might differ due to rounding.

3.0 Challenges and Risks to Growth in Ontario



The number of businesses producing Ontario craft beer has grown by factor of 4.5 over the past 10 years. Despite being small and independent with an average of 14 employees, bricks-and-mortar craft breweries have invested at least \$500 million over the last decade. Although heavily impacted by COVID-19, Ontario craft beer still represents the growth segment of the beer brewing industry in Ontario and currently represents about 11% of the Ontario beer market. However, the industry is facing several challenges if it is to continue to grow, arising from issues related to the regulatory environment and market access.

3.1 Faster Increase of Tax Burden

Beer producers in Ontario must pay several provincial production taxes on their product. In particular, brewers must pay the:

- Beer Basic Tax Rate (based on number of litres produced, Figure 3)
- Volume Tax (17.6 cents per litre excluding brewpubs)
- Environmental Tax (8.93 cents per non-refillable container)

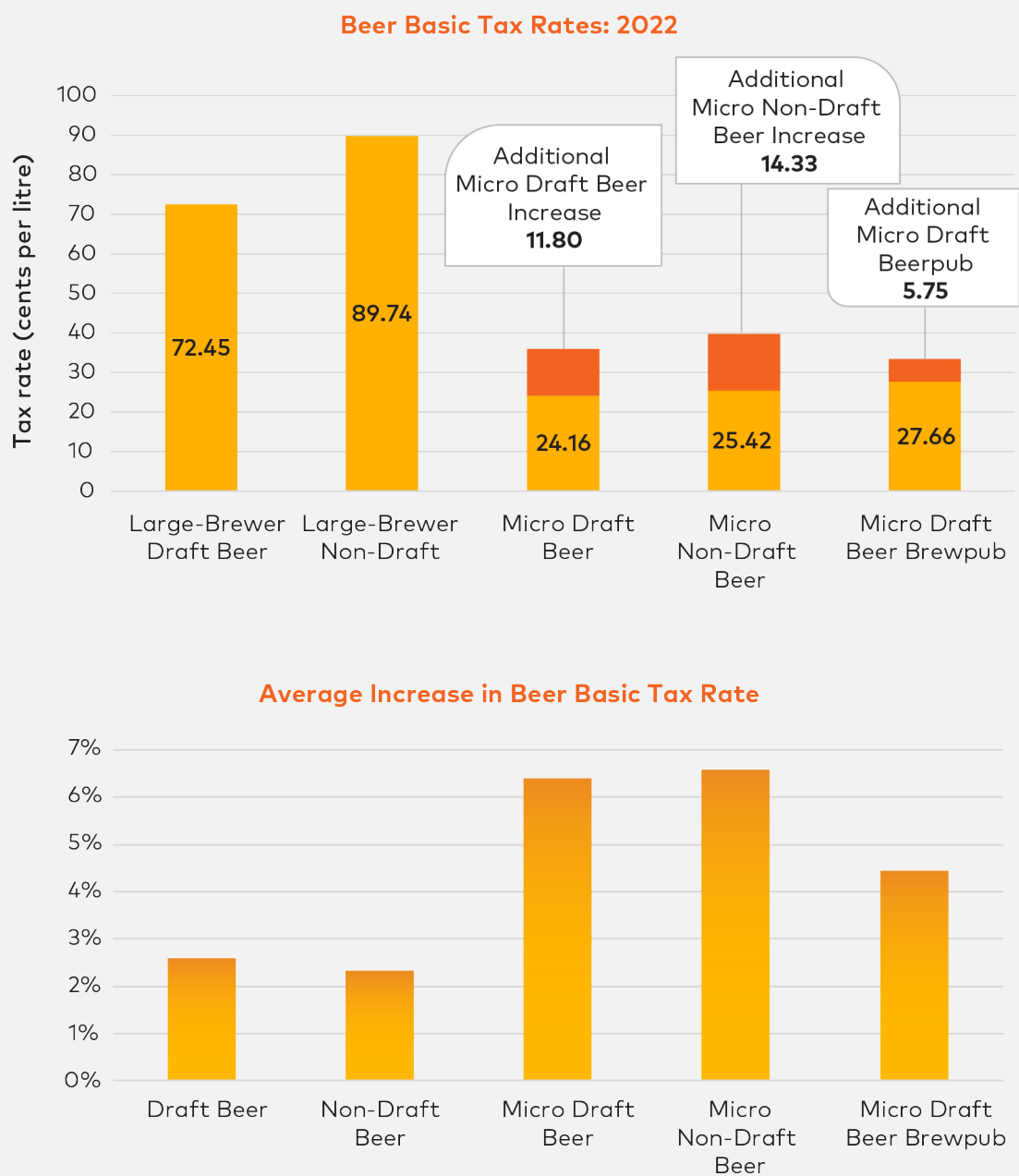
Brewers who produce less than 49,000 hL are eligible for a reduced Beer Basic Tax Rate. Brewers who produce between 49,000 hL and 200,000 hL are eligible for a Small Beer Manufacturers Tax Credit. The reduced Beer Basic Tax Rate and Tax Credit are designed to support the operation and growth of small breweries across the province.

In spite of this, since 2010, the microbrewery Beer Basic Tax Rate has been increasing almost 3 times faster than the Beer Basic Tax Rate for internationally-owned brewing companies (Government of Ontario, 2022). This limits craft brewers' ability to invest in their breweries, employees, and communities and has impeded the rates of return on investments and competitiveness with the rest of the industry which is largely foreign-owned.



The beer basic tax rate has increased almost 3 times faster than the beer basic tax for internationally-owned brewing companies

Figure 3: **Ontario beer basic tax rates (top) and average annual increase since 2010 (bottom)**



The dark orange components on the Beer Basic Tax Rate for the microbreweries in the figure show the additional taxes per litre due to the faster tax rate increases for the microbreweries. If the tax rate for microbrewers had increased at the same rate as for the multinational breweries since 2010 (illustrated by the light orange component of the microbreweries tax rates), it would have resulted an additional \$6.8M annually for small businesses to reinvest in additional capacity or employment.⁴ If invested in additional capacity, this could add up to 50,000 additional hL of production annually. Over 10 years, this investment by itself could:

- increase craft beer production by almost 30%,
- support an additional \$199M in annual GDP which includes \$60M from the growth in tourism and related businesses

The "Environmental tax" disproportionately impacts small craft brewers since a much greater percentage of their product is packaged cans to beer packaged in cans compared to the larger international brewers.

3.2 Breweryless Producers

In addition to the 339 bricks-and-mortar breweries in Ontario, Ontario is home to a growing number of breweryless producers, also known as contract brewers. Breweryless producers do not have their own equipment or establishments to brew their own beer. Instead, they hire other businesses to produce their beer. However, they gain access to the taxation benefits that are afforded to the smaller brick-and-mortar craft brewers nonetheless. Such producers do not have the investments and capital overheads of brick-and-mortar craft brewers and do not contribute to the tourism and community benefits associated with brick-and-mortar craft brewers.

On average, a bricks-and-mortar brewery contributes 4 times more to the economy per employee than a breweryless producer.

Given the economies of scale afforded to larger breweries typically used by breweryless producers, if contract brewing for breweryless producers were to replace Ontario bricks-and-mortar breweries, 57% of direct craft brewing jobs would be at risk as production in smaller brick-and-mortar establishments is shifted to the larger co-packers. In addition, since there are fewer co-packers to attract tourists, up to \$200M of tourism-related economic activity is also at risk.



If Breweryless producers replace Ontario bricks-and-mortar breweries, 57% jobs & \$200 million of tourism-related economic activity could be at risk.

⁴ Based upon current craft production of 850,000 hL, and the distribution of brewery sizes. Note that some larger craft breweries exceed 49,000 hL of output and receive the small beer tax credit instead of the Microbreweries Beer Basic Tax Rate.

3.3 Market Access

The beer market in Ontario is highly regulated and in order to access the retail or distribution market, craft brewers must go through the LCBO to get their product into the LCBO, grocery stores, or the Beer Store. With almost as many companies licensed to manufacture craft beer in Ontario (414) as there are grocery store licenses (450 province-wide), craft brewers are frequently unable to sell their product in their local community outside of their own brewery. This restriction prevents craft brewers from efficiently reaching even local markets, which are often their most ardent supporters, and significantly limits the ability of such brewers to grow their operations.

In addition, craft brewers produce a variety of novel small-batch products. The process of getting new products into the wider market can be prohibitive, requiring registration, lab testing, and approval of the product with the LCBO, and for customers to order through the LCBO system.

For a limited production of a craft beer, the process of registering, lab testing, and approving the product, and the associated timelines involved, and then hoping that retailers or distributors would order it, may be prohibitive.

This additional overhead on both the craft brewers, and the grocery chains for which it is more economical to negotiate bulk purchases of non-craft beer, limits the ability of these innovative craft beer products to reach a larger market. A more direct relationship between brewer and retailer could improve the ability of small brewers to reach a wider market.

The result of the structure of Ontario's beer retailing and distribution channels, which are controlled by large companies and government agencies, is that it privileges internationally-owned brewing companies at the expense of local craft breweries. This restricts consumer choice, limits the ability of Ontarians to buy locally-made beer, and impedes the growth of the craft beer industry.



A more direct relationship between brewer and retailer could **improve the ability of small brewers to reach a wider market**

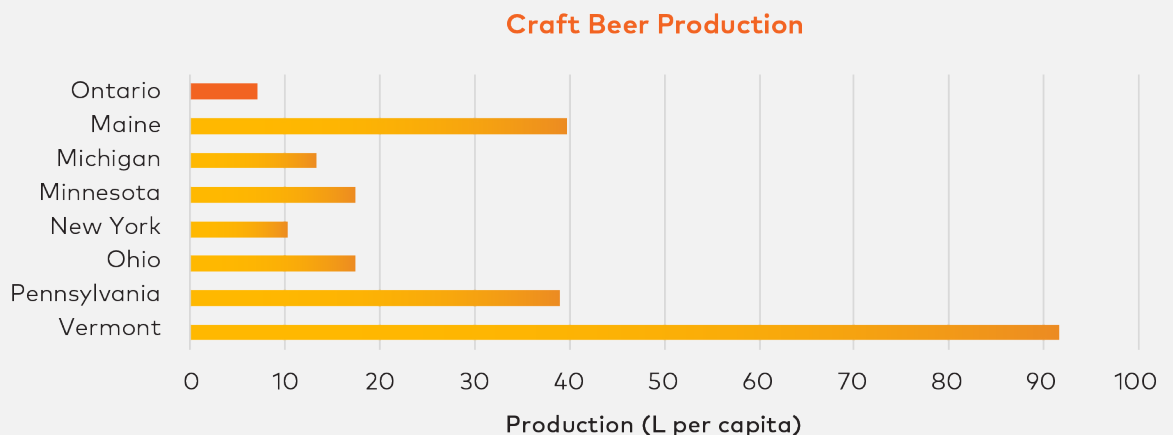
4.0 Potential For Growth



Given the relatively young age of Ontario's modern craft beer industry, investigating the potential for growth by examining comparable regions which have more established industries provides a good guide to understand where the industry could go, given the right conditions. Using nearby U.S. states, such as Pennsylvania which is home to some of America's earliest craft breweries in the early 1980s, provides a good starting point.

With 7.1 L of craft beer production per 100,000 capita (age 19+), Ontario produces 62% less craft beer per capita than the average of its neighbouring states, and would rank 33rd in per capita production among all 50 states, far less than many nearby states such as Vermont (13 times more than Ontario), Maine (5.5 times), Pennsylvania (5.5 times), Michigan (1.8 times), and New York (1.4 times). This suggests that there is a latent demand for local craft beer in Ontario, and provides some explanation for the rapid growth of the industry over the last decade.

Figure 4:
Comparison
of craft beer
production in
Ontario in
nearby U.S.
states



With a favourable regulatory environment, the size of the Ontario craft beer industry could conservatively be increased by at least 45%, which would make Ontario comparable to New York State, that ranks 23rd in the US. This level of production is still below many of the other nearby regions. This growth, if executed by Ontario bricks-and-mortar craft breweries, could result in 10-year totals of:

- \$2.35 billion more in economic activity, including \$510 million more in tourism
- Almost 1,000 more jobs for Ontarians
- \$380M additional private capital investment within the sector

Many of the small breweries, which generally have greater overheads as a percentage of total costs, could scale production up to improve their sustainability to meet this latent demand. However, this growth is at risk if craft brewers face faster tax rate increases than their non-craft competitors, or they are unable to get their product to a sufficiently large market.

5.0 Conclusions



The Ontario craft brewing industry continues to grow in a province whose economy is still recovering from the pandemic. Throughout Ontario, the craft brewing industry is increasing production to meet new and growing consumer demand. Ontario's craft breweries act as local economic engines generating revenue and jobs which in turn are multiplied throughout the local economy – each dollar and job generated directly by craft brewers generates more revenue and more jobs. As the industry grows, so will this total economic impact. However, the dominance of internationally-owned brewing companies and the emergence of breweryless producers create challenges to further growth and competitiveness.

The success of Ontario's craft brewing industry remains tied to the policies and regulations in the province that can either foster or impede growth. It is crucial for the province's political leadership to continue to support the industry through positive policy action. As small businesses already facing a large tax burden and stringent regulations, Ontario's brewers have limited ability to absorb a small-brewery targeted increase in cost of doing business in the province.

The Government of Ontario should consider the potential economic benefits of modernizing the regulatory framework governing craft brewing and beer retailing. This should be done so as not to privilege internationally-owned brewing companies and breweryless producers at the expense of locally-owned bricks-and-mortar craft breweries and Ontario beer consumers. The future success of the province's craft brewers – who provide numerous strong jobs, community support and help to drive local economies – is not yet written and cannot be taken for granted. By advancing positive policies, Ontario's leaders can build a brighter future for craft brewers and small businesses throughout the province.



A. Methodology

Economic contributions arise from three main effects by economic convention:

Direct Effects

Include all economic activity directly attributable to the operations of the craft brewery industry and their investments, as well as the expenditures of the craft brewery industry wages to their employees.

Indirect Effects

Include all the economic activity supported by business-to-business interactions within the supply chain. They include spending on the goods and services required to conduct business by the craft brewery industry and their investments and the business-to-business transactions in local communities where craft brewery employees spend their wages. The latter would include additional wages paid to salespeople working in shops where households spend their income and the inputs required to produce and supply the additional goods bought by these households.

Induced Effects

Include all economic activity supported by the spending of wages earned by workers whose employment is supported by craft beer activities and investments. For example employees of suppliers and employees of local businesses where wages are spent. Induced effects also include expenditures on increased capacity or the replacement of depreciating capital stock that result from reinvesting business profits. These purchases or activities can lead to further hiring, resulting in income and tax revenues.

Detailed provincial-level Statistics Canada data on the supply and use flows of industries provide the connections between the direct, indirect and induced economic contributions. However, the North American Industry Classification System (NAICS) category for Breweries (NAICS code 312120) includes both large industrial facilities as well as small craft breweries. As the economics of the large and small breweries are quite different, it is important when examining the economics of the craft brewing sector to decompose the original brewery sector data into separate sub-industries for small and large breweries.

To achieve this, the constraints that the output of the craft breweries is 11% of the total Ontario domestic beer production, but provide 75% of the employment were used to adjust the productivity of the craft beer and large-beer industries such that industry totals were maintained. In addition, wages of each sub-sector were adjusted according to the relative productivity of each.

B. Data Sources

Statistics Canada CANSIM tables used in this analysis include:

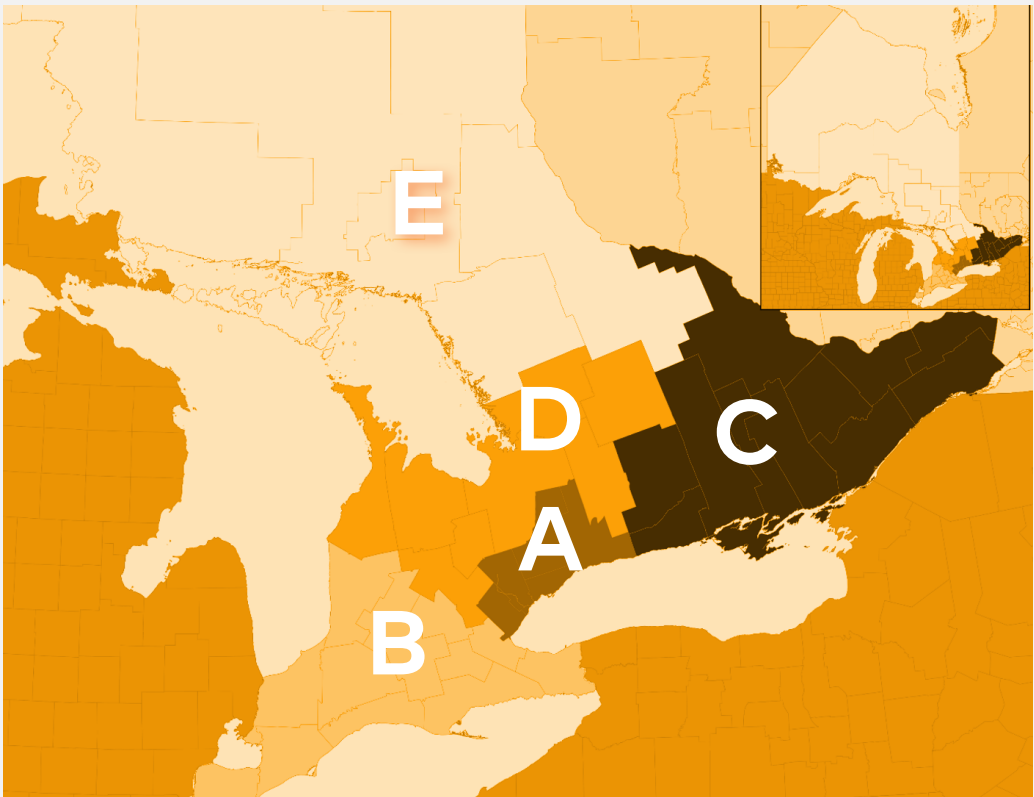
- **10-10-0010** Sales of alcoholic beverages types by liquor authorities and other retail outlets, by value, volume, and absolute volume
- **10-10-0011** Value of sales of alcoholic beverages of liquor authorities and other retail outlets, by beverage type
- **11-10-0012** Distribution of income by census type
- **11-10-0019** Economic dependency profile of census families by family type and source of income
- **11-10-0033** Economic dependency profile by income and sex
- **11-10-0223** Household spending by income quintile,
- **11-10-0224** Household spending by household type,
- **16-10-0117** Principal statistics for manufacturing industries, by North American Industry Classification System
- **17-10-0139** Population estimates, July 1, by census division, 2016 boundaries
- **17-10-0142** Population estimates, July 1, by census subdivision, 2016 boundaries
- **33-10-0568** Canadian Business Counts, with employees, June 2022
- **33-10-0569** Canadian Business Counts, without employees, June 2022
- **36-10-0489** Labour statistics consistent with the System of National Accounts (SNA), by job category and industry
- **33-10-0395** Canadian Business Counts, with employees, June 2021
- **33-10-0396** Canadian Business Counts, without employees, June 2021
- **33-10-0267** Canadian Business Counts, with employees, June 2020
- **33-10-0268** Canadian Business Counts, without employees, June 2020
- **33-10-0214** Canadian Business Counts, with employees, June 2019
- **33-10-0215** Canadian Business Counts, without employees, June 2019
- **33-10-0222** Canadian Business Counts, with employees, December 2019
- **33-10-0223** Canadian Business Counts, without employees, December 2019
- **36-10-0595** Input-output multipliers, provincial and territorial, detail level
- **36-10-0478** Supply and use tables, detail level, provincial and territorial
- **36-10-0001** Symmetric input-output tables, detail level
- **36-10-0013** Input-output multipliers, summary level
- **36-10-0084** Symmetric input-output tables, summary level
- **36-10-0113** Input-output multipliers, provincial and territorial, summary level
- **36-10-0221** Gross domestic product, income-based, provincial and territorial, annual
- **36-10-0222** Gross domestic product, expenditure-based, provincial and territorial, annual
- **36-10-0438** Supply and use tables, summary level, provincial and territorial
- **36-10-0450** Revenue, expenditure and budgetary balance - General governments, provincial and territorial economic account
- **36-10-0478** Supply and use tables, detail level, provincial and territorial (x 1,000)
- **36-10-0587** Distributions of household economic accounts, income, consumption and saving, by characteristic
- **36-10-0595** Input-output multipliers, provincial and territorial, detail level
- **98-10-0023** Age (in single years), average age and median age and gender: Canada, provinces and territories, census divisions, census subdivisions and dissemination areas

C. Geographic Results

The following section provides addition details about the geographic distribution of results, and the municipalities included within each of the regions.

Figure 5 and Table 3 show which municipalities are assigned to each geography region. Table 4 shows direct economic activity arising from the craft beer industry. Table 5 shows the indirect, induced, and tourism components of the economic activity for each of the regions.

Figure 5: **Regional grouping of Ontario municipalities**



- A Greater Toronto Area B Southwestern Ontario C Eastern Ontario
- D Central Ontario E Northern Ontario

Table 3: The municipalities within each geographic region

Greater Toronto Area (GTA)	Central Ontario	Eastern Ontario	Southwestern Ontario	Northern Ontario
Durham	Bruce	Frontenac	Brant	Algoma
Halton	Dufferin	Hastings	Chatham-Kent	Cochrane
Peel	Grey	Lanark	Elgin	Greater Sudbury
Toronto	Haliburton	Leeds and Grenville	Essex	Kenora
York	Kawartha Lakes	Lennox and Addington	Haldimand-Norfolk	Manitoulin
	Muskoka	Northumberland	Hamilton	Nipissing
	Simcoe	Ottawa	Huron	Parry Sound
	Wellington	Peterborough	Lambton	Rainy River
		Prescott and Russell	Middlesex	Sudbury
		Prince Edward	Niagara	Thunder Bay
		Renfrew	Oxford	Timiskaming
		Stormont, Dundas and Glengarry	Perth	
			Waterloo	

Table 4: Direct regional economic contributions

Region	# of Employees	Direct GDP (\$M)	Labour Income (\$M)	Average Compensation (Wages + Benefits)
Southwestern Ontario	920	\$37	\$49	\$53,180
GTA	1,650	\$123	\$116	\$70,440
Eastern Ontario	910	\$23	\$49	\$53,850
Central Ontario	1,060	\$43	\$64	\$60,600
Northern Ontario	140	\$3	\$7	\$47,010
Ontario	4,680	\$228	\$285	\$60,890

Table 5: Indirect, induced activity, and other benefitting industries by geographic region

Region	Indirect GDP (\$M)	Induced GDP (\$M)	Tourism GDP (\$M)
Southwestern Ontario	\$9	\$65	\$40
GTA	\$28	\$52	\$106
Eastern Ontario	\$5	\$31	\$23
Central Ontario	\$10	\$41	\$37
Northern Ontario	\$1	\$5	\$5
Ontario⁵	\$52	\$193	\$211

5 The Ontario total might differ from the sum of the regions due to rounding

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