

Le Canada: l'énergie, l'innovation et l'Accord de Paris

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Présidente, Analytica Advisors



Conférence des Nations unies sur les changements climatiques

COP21/CMP11



L'engagement du Canada :

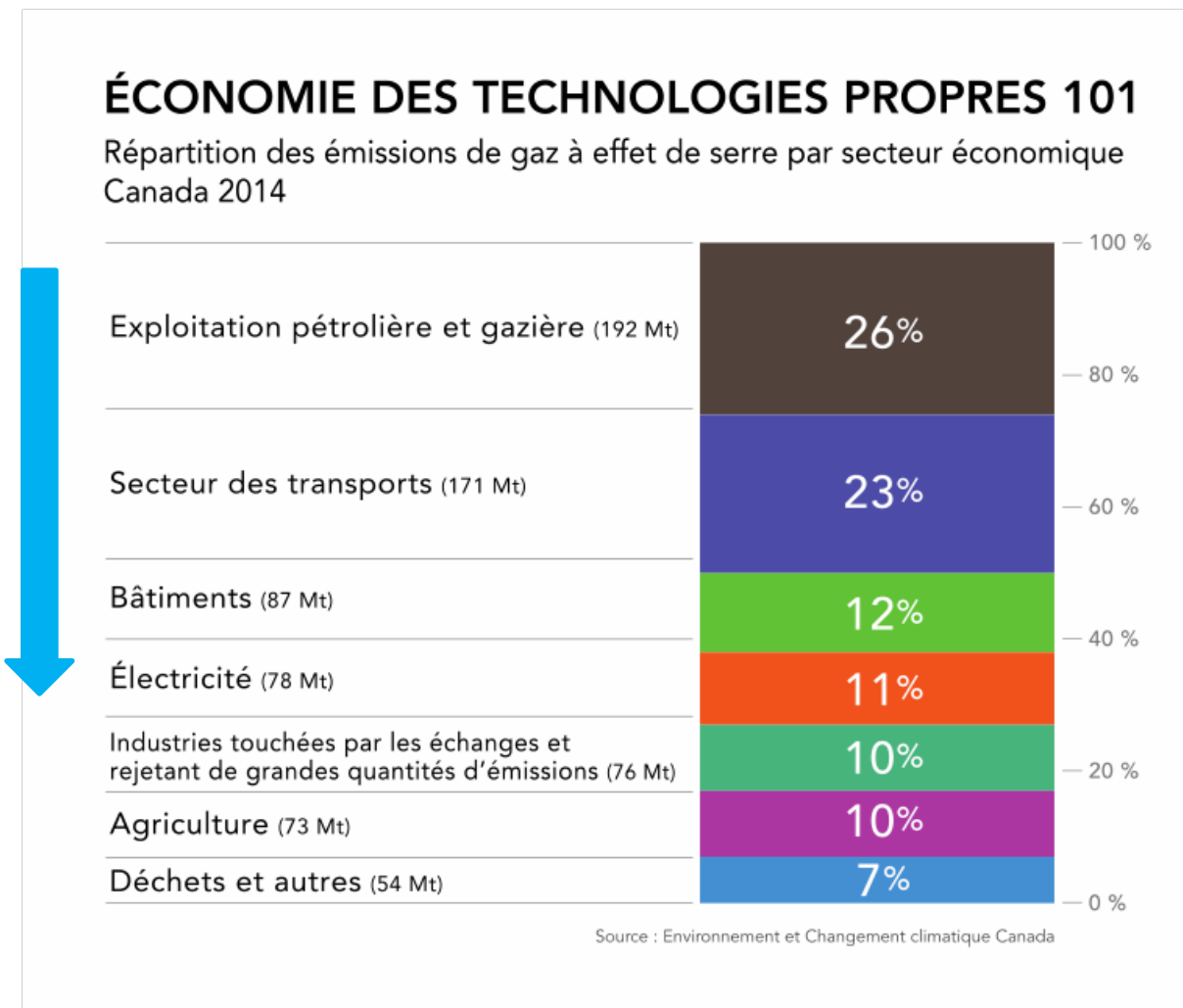
D'ici 2030, réduire les émissions de GES de 30%
par rapport au niveau de 2005.



Afin d'atteindre et de surpasser ces cibles,
le Consensus de Vancouver tourne autour de quatre axes de travail:

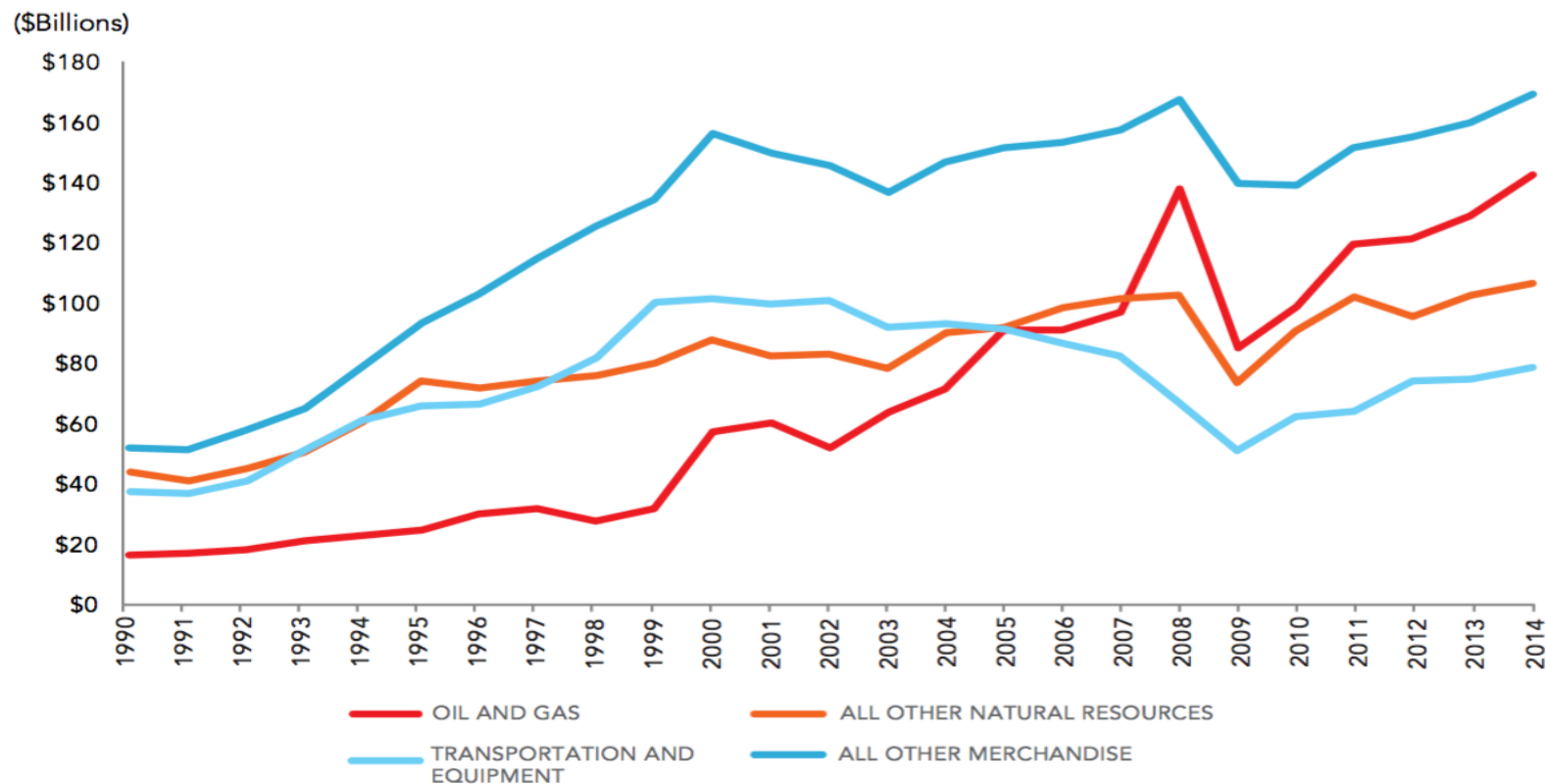
1. Les mesures d'atténuation – selon les principales sources de GES
2. L'instauration d'un prix sur le carbone
3. L'adaptation aux dérèglements climatiques
4. La croissance économique et les technologies propres

1. Les mesures d'atténuation visent 4 grandes sources d'émissions de GES



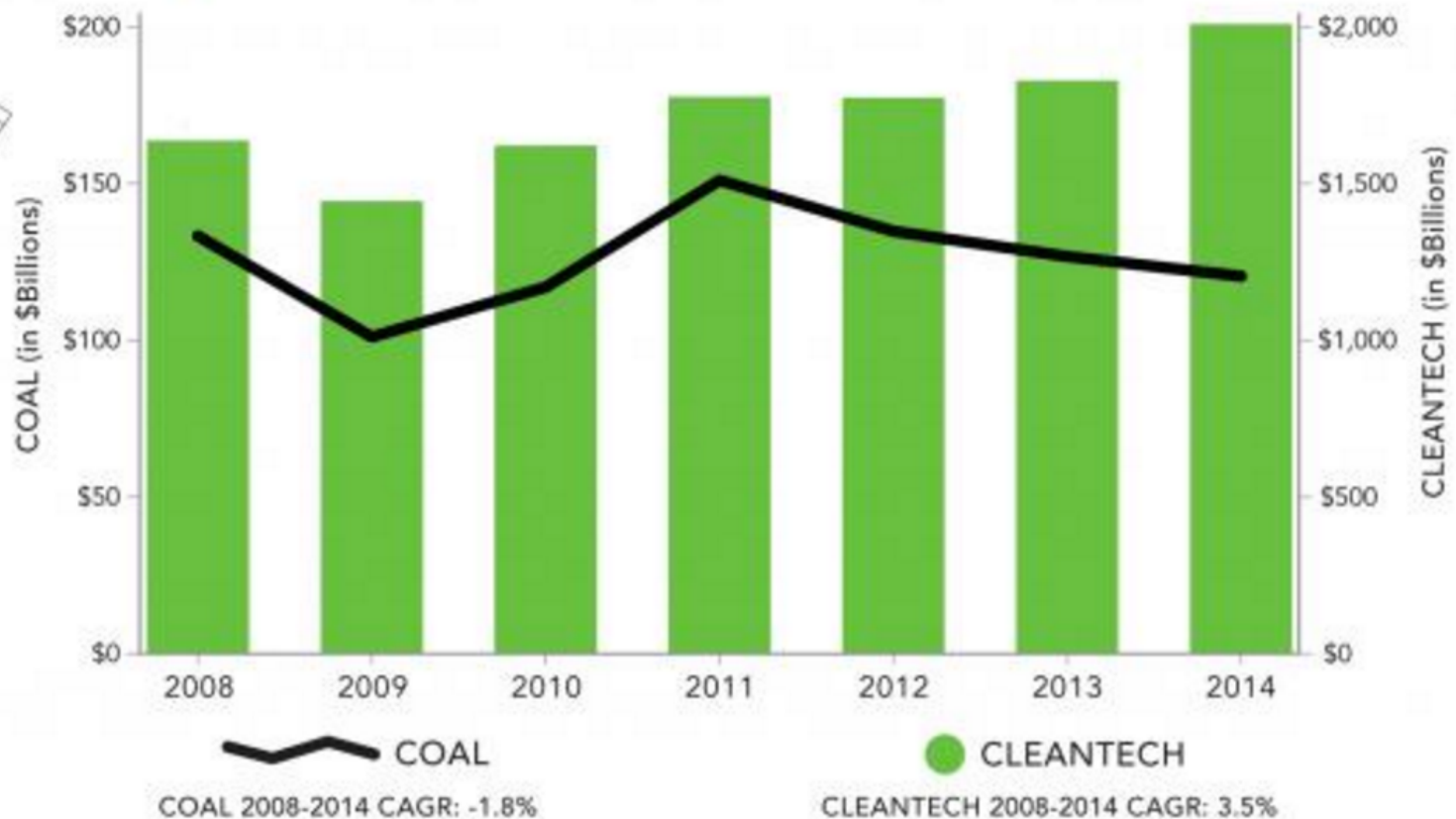
Les exportations d'hydrocarbures se classent 2e au Canada

FIGURE 1.2.2 ○ OIL & GAS, OTHER NATURAL RESOURCES, TRANSPORTATION & EQUIPMENT AND OTHER MERCHADISE EXPORTS 1990 TO 2014



Data Source: Statistics Canada; Source: Analytica Advisors

À l'échelle planétaire, le commerce des biens environnementaux équivaut à 17 fois celui du charbon



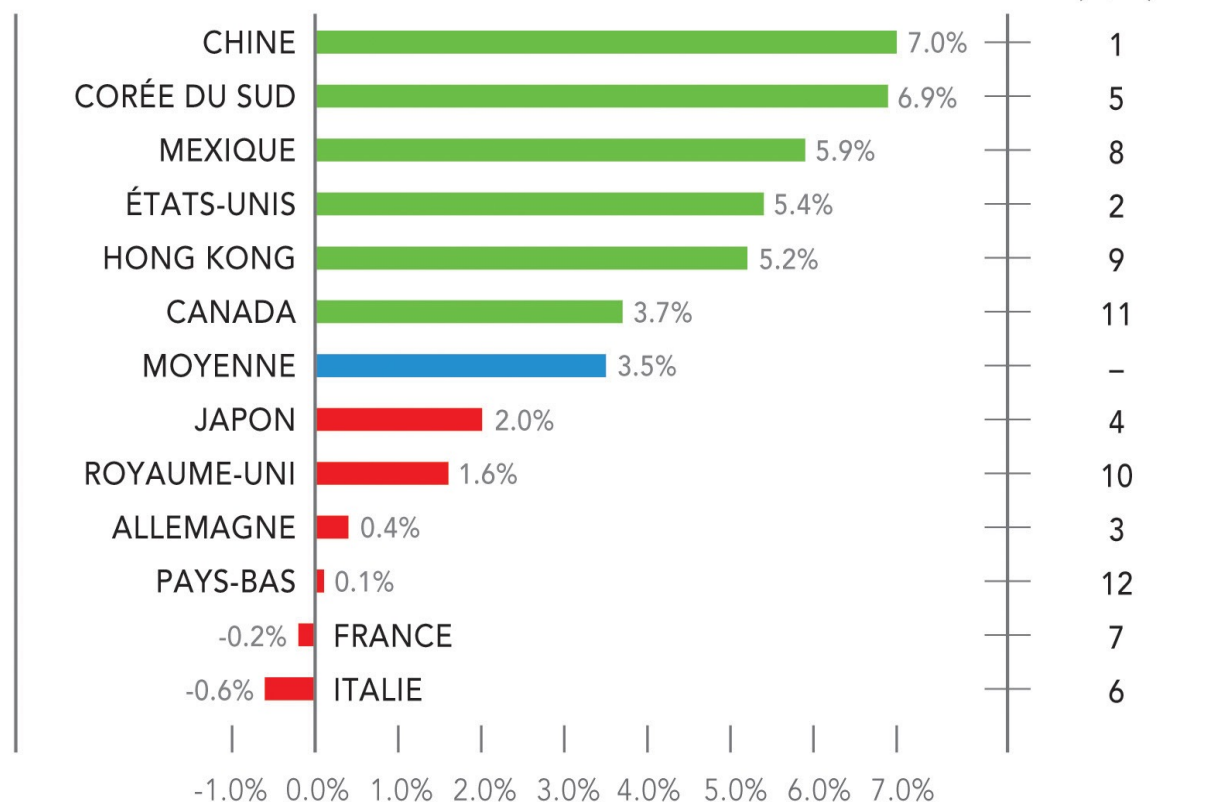


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Le Canada est actif au niveau du commerce international des biens environnementaux

**12 PRINCIPAUX COMMERÇANTS MONDIAUX
DE BIENS ENVIRONNEMENTAUX FABRIQUÉS
TCAC 2008-2014**

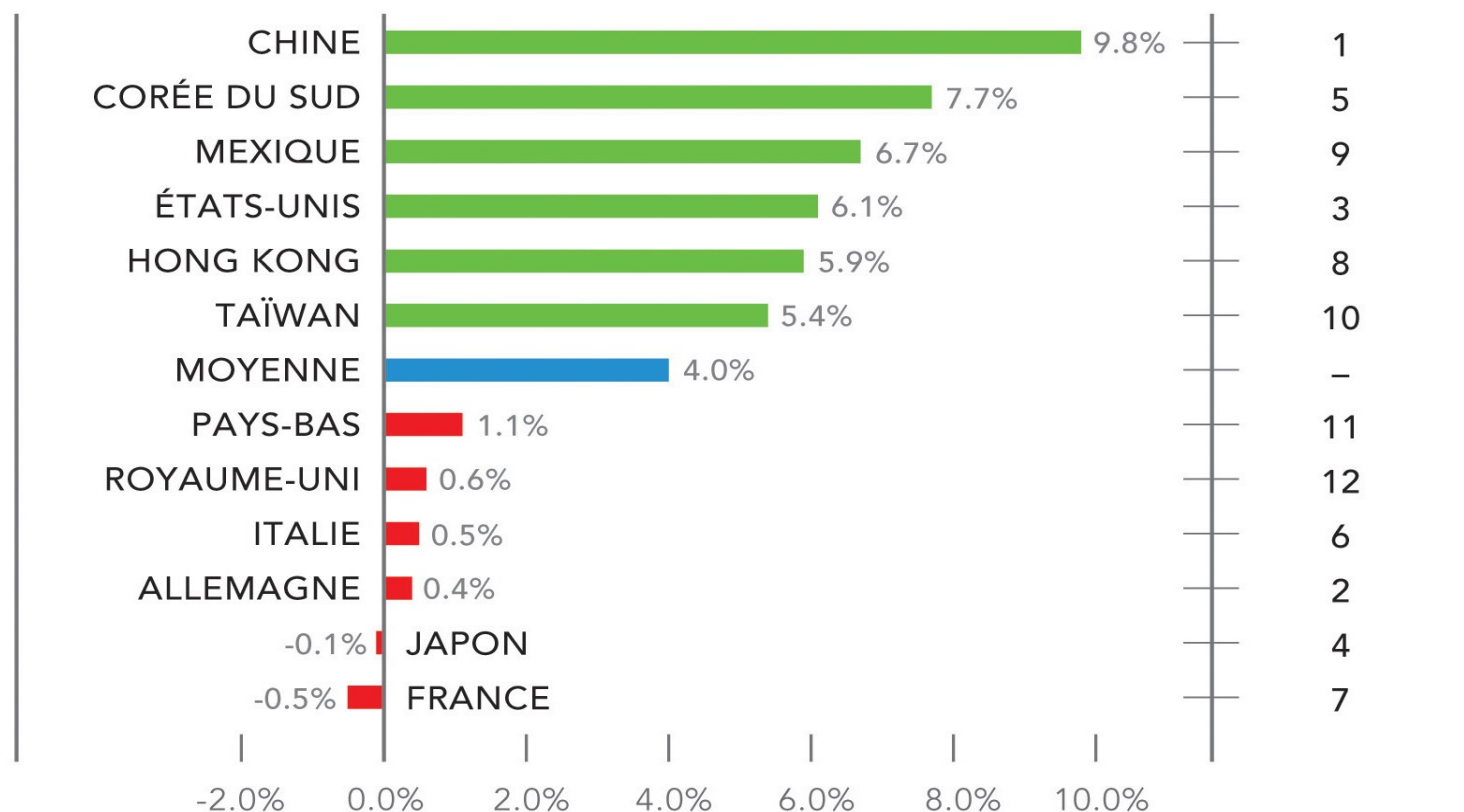
**CLASSEMENT
DES
COMMERÇANTS
MONDIAUX
(2014)**



...mais beaucoup moins au niveau des exportations de biens environnementaux, n'apparaissant pas au nombre des 12 plus grands exportateurs.

**12 PRINCIPAUX EXPORTATEURS
DE BIENS ENVIRONNEMENTAUX FABRIQUÉS
TCAC 2008-2014**

CLASSEMENT
DES
EXPORTATEURS
(2014)





Entre 2005 et 2014, la valeur des exportations des biens environnementaux est passée de 567 à 1,065 milliards de dollars

2005				2014			
Rank	Exporting Country	2005 Exports	2005 Global Market Share	Rank	Exporting Country	2014 Exports	2014 Global Market Share
Reporting Total* \$547,567,584,357				Reporting Total* \$1,065,370,937,741			
1	Germany	\$78,213,354,011	14.0%	1	China	\$215,054,188,837	20.2%
2	United States	\$56,472,356,329	10.3%	2	Germany	\$126,569,077,648	11.9%
3	China	\$55,309,221,356	10.1%	3	United States	\$103,259,946,597	9.7%
4	Japan	\$52,671,189,306	9.6%	4	Japan	\$61,312,421,991	5.8%
5	Italy	\$29,717,558,741	5.4%	5	South Korea	\$58,631,440,309	5.5%
6	France	\$25,835,111,921	4.7%	6	Italy	\$46,352,956,995	4.4%
7	United Kingdom	\$18,966,132,061	3.5%	7	France	\$32,980,152,909	3.1%
8	Taiwan	\$18,752,221,684	3.4%	8	Hong Kong	\$28,137,006,907	2.6%
9	Hong Kong	\$16,352,136,584	3.0%	9	Mexico	\$26,495,608,939	2.5%
10	South Korea	\$15,636,576,103	2.9%	10	Taiwan	\$25,476,993,776	2.4%
11	Netherlands	\$15,042,306,547	2.7%	11	Netherlands	\$23,675,457,188	2.2%
12	Mexico	\$13,496,050,527	2.5%	12	United Kingdom	\$22,954,227,185	2.2%
13	Belgium	\$13,386,504,672	2.4%	13	Singapore	\$19,926,580,907	1.9%
14	Canada	\$11,138,973,926	2.0%	14	Belgium	\$18,761,656,566	1.8%
15	Singapore	\$10,118,459,652	1.8%	15	Spain	\$17,533,410,202	1.6%
16	Denmark	\$10,077,063,298	1.8%	16	Denmark	\$16,200,333,043	1.5%
17	Malaysia	\$9,174,544,404	1.7%	17	Czech Republic	\$15,561,571,866	1.5%
18	Spain	\$8,745,054,887	1.6%	18	Poland	\$14,320,696,602	1.3%
19	Switzerland	\$8,707,634,423	1.6%	19	Canada	\$14,212,173,028	1.3%
20	Sweden	\$8,681,635,078	1.6%	20	Malaysia	\$14,073,710,942	1.3%
21	Austria	\$7,980,938,345	1.5%	21	Austria	\$13,550,717,026	1.3%
22	Czech Republic	\$6,701,119,296	1.2%	22	Switzerland	\$13,096,184,156	1.2%
23	Thailand	\$5,725,205,386	1.0%	23	Hungary	\$12,562,966,079	1.2%
24	Poland	\$5,326,184,350	1.0%	24	Thailand	\$12,133,192,459	1.1%
25	Ireland	\$4,489,141,291	0.8%	25	Sweden	\$12,071,047,012	1.1%
% of 2005 global market share held by top 25 exporters = 92.1%				% of 2014 global market share held by top 25 exporters = 90.6%			

● = COUNTRIES OVERTAKING CANADA DURING THE PERIOD

Data source: World Trade Atlas. Source: Analytica Advisors.

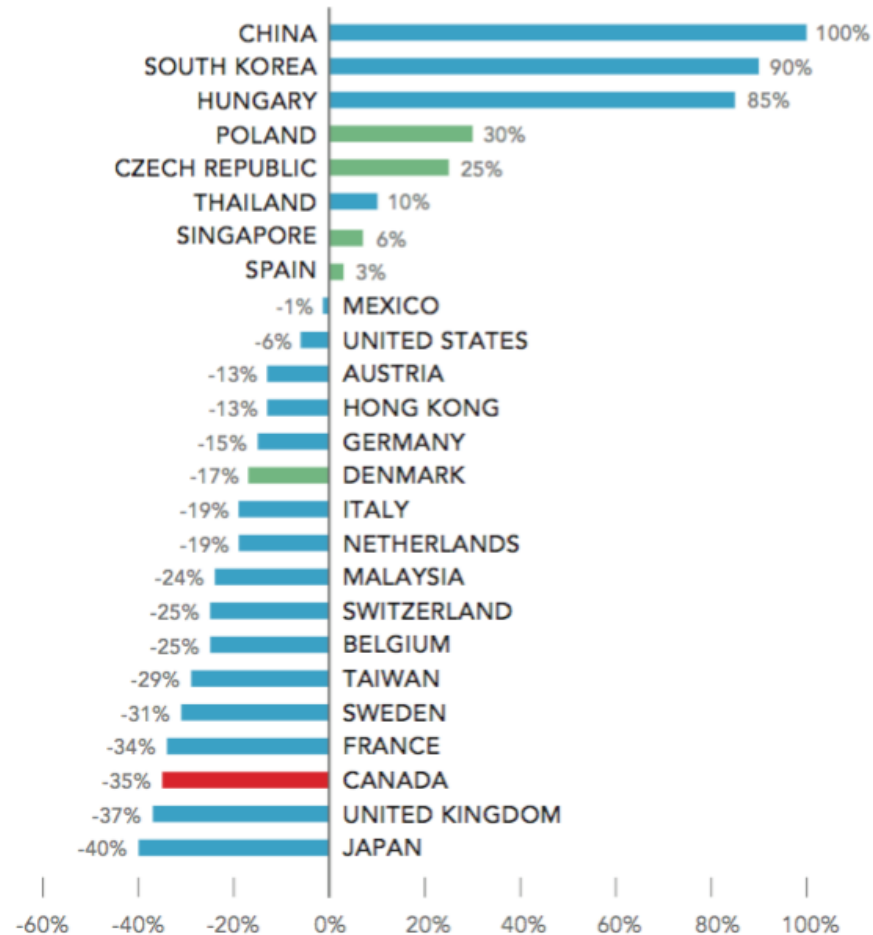
Nominal Values

*Reporting total includes 79 countries. Results from the top 25 countries exports are reported above.



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Pendant cette même période, la Chine a doublé sa part du marché mondial



● = COUNTRIES OVERTAKING CANADA DURING THE PERIOD

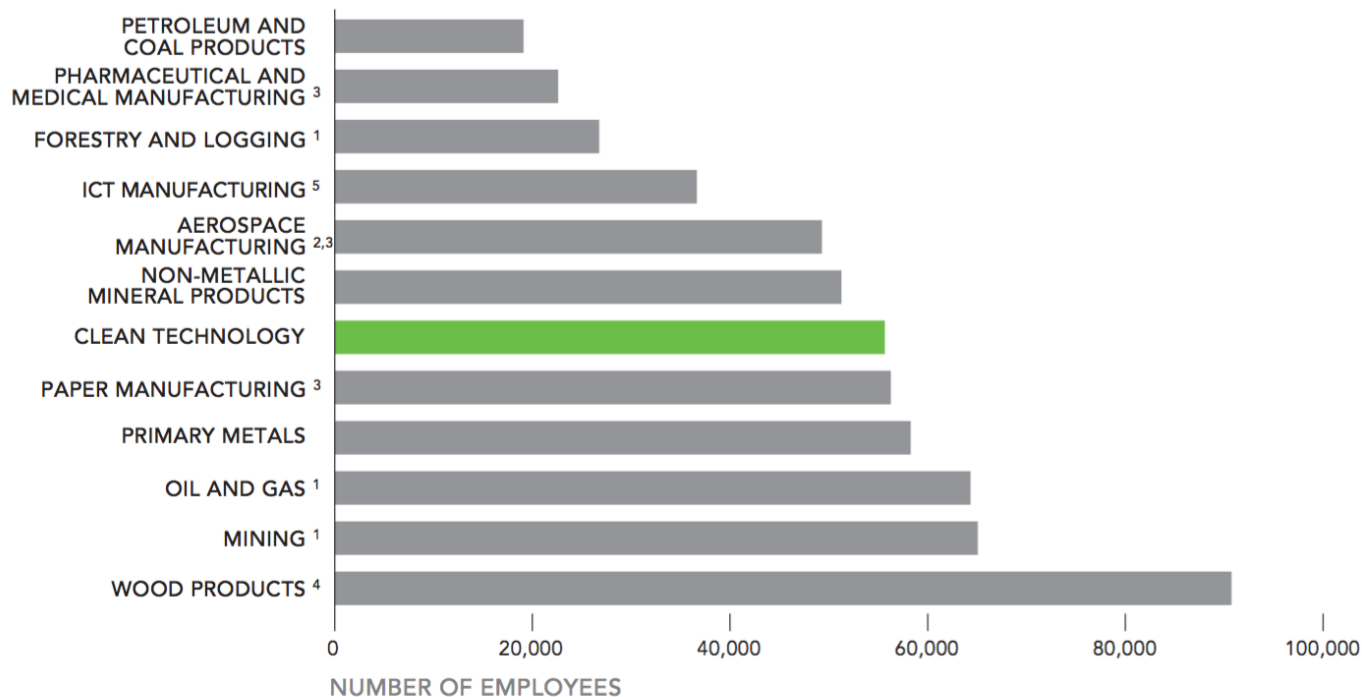
Data source: Global trade reports Source: Analytica Advisors



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L'emploi dans le secteur des technologies propres au Canada dépasse déjà celui des secteurs mieux connus

FIGURE 2.3.4. ○ COMPARISON OF SELECTED CANADIAN INDUSTRIES 2014
DIRECT EMPLOYMENT



¹ Excludes support employment; data for manufacturing and extraction

² Aerospace products and parts and manufacturing

³ Total employment

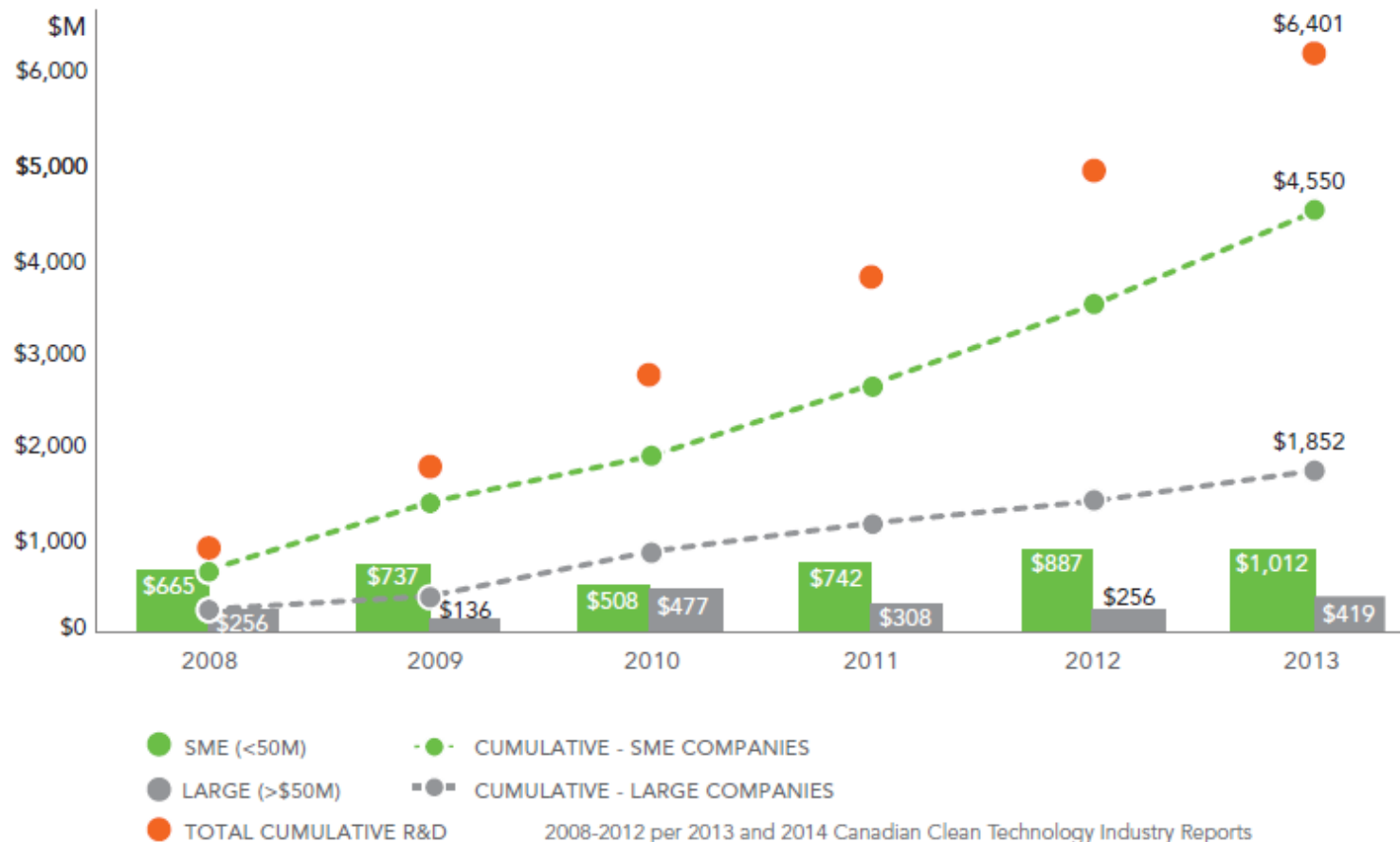
⁴ Wood Products include pulp, paper, paperboard mills and converted paper products

⁵ ICT manufacturing (2014 data taken from 2013).

Data Source: Statistics Canada, Industry Canada, Analytica Advisors

Les PME dominent les investissements en innovation

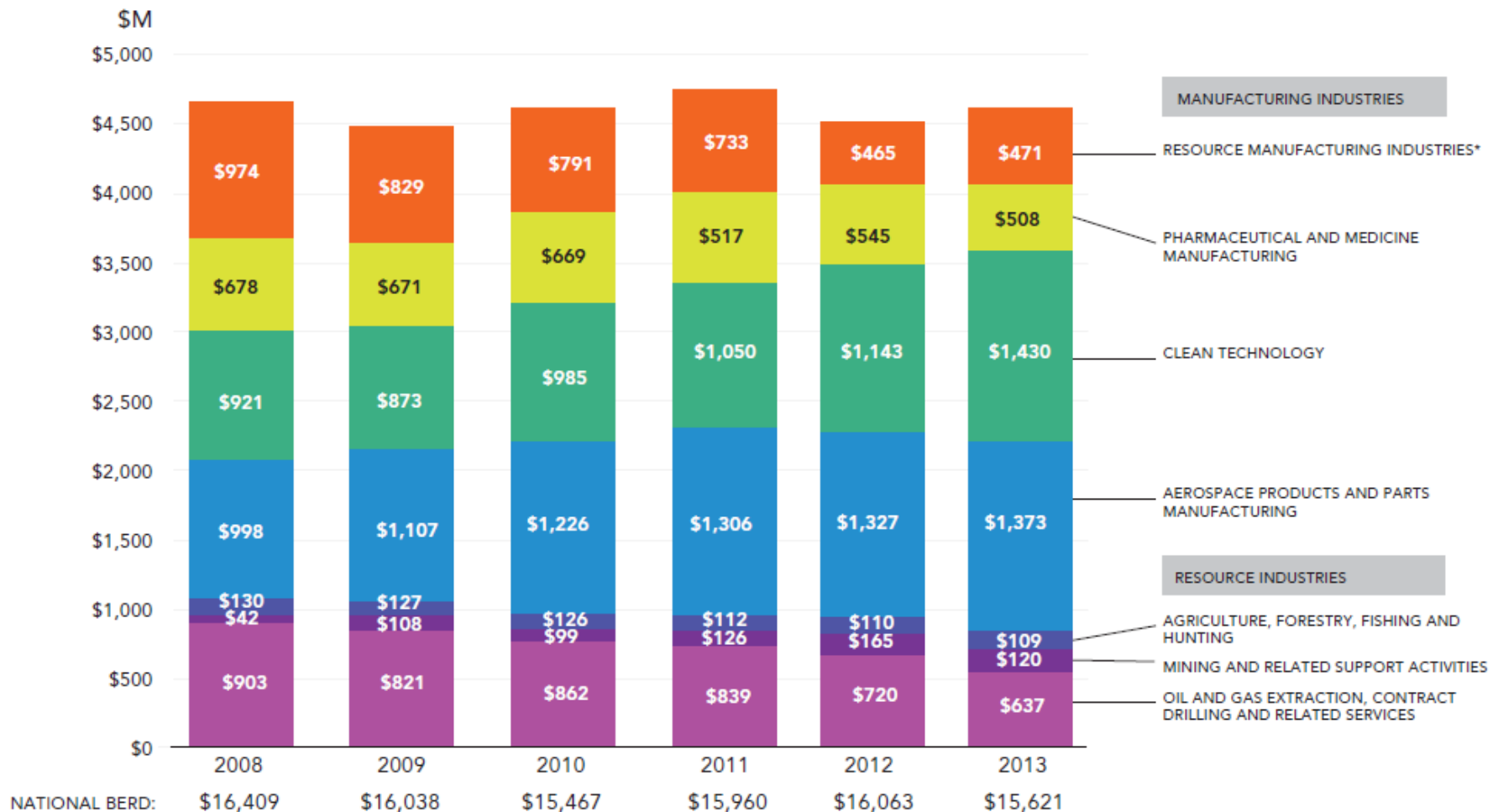
FIGURE 2.8.2 ● ANNUAL AND CUMULATIVE R&D INVESTMENTS BY CANADIAN CLEAN TECHNOLOGY COMPANIES – SME VERSUS LARGE COMPANIES (2008 TO 2013)





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Le potentiel de l'innovation par secteur



* Resource manufacturing industries include Mineral Products, Primary Metal, Wood Products, Paper, Petroleum and Coal Products. Figure for 2011 does not include Petroleum and Coal Products, as Statistics Canada has suppressed the data to meet the confidentiality requirements of the Statistics Act.
Data source: Statistics Canada, Analytica Advisors (Clean Technology); Source: Analytica Advisors

...mais il reste encore du travail à faire!

ÉCONOMIE DES TECHNOLOGIES PROPRES 101

Exportations canadiennes 2005-2014

(en milliards de \$)	2005	2014
Exportations des hydrocarbures*	87,4 \$	142,4 \$
Exportations de l'industrie automobile	87,7 \$	78,8 \$
Exportations des technologies propres	11,1 \$	14,2 \$
Exportations en pourcentage du PIB**	27,8 %	24,7 %

*Combustibles minéraux, huiles minérales et produits de leur distillation, matières bitumineuses; cires minérales.

**PIB aux prix du marché CANSIM a37

Source : Analytica Advisors et Statistique Canada

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