

AEROSPACE IS A HUMAN RACE

ACCELERATING INNOVATION

The dynamics of our extraordinary environment, business community and exceptional talent has spurred growth and innovation in Mississauga's aerospace sector. This strong and expanding sector allows for sharing of resources and ongoing opportunities for convergence and synergies for further innovation. Mississauga's aerospace cluster is comprised of airlines, aerospace manufacturing, airport services and support services for aerospace manufacturers. Together they create the number one aerospace cluster in Canada.

INNOVATION • GROWTH • LEADERSHIP

- Mississauga is Canada's largest aerospace cluster by employment
- Employment of over 24,000 people in over 220 aerospace companies
- Mississauga's aerospace manufacturing sub-sector is the largest across all major Canadian centres by total employment and number of businesses¹
- Canada's business costs are ranked most cost competitive among the G-7 nations and is 7.2% lower than the U.S.²
- Canada has the lowest aircraft cost structure among all G-7 countries
- Mississauga's business costs ranks among the lowest of all major cities in Canada
- Over 70 Fortune 500 companies with a head office or major divisional head office are located in Mississauga



¹Source: Statistics Canada, Canadian Business Patterns Data, December 2014

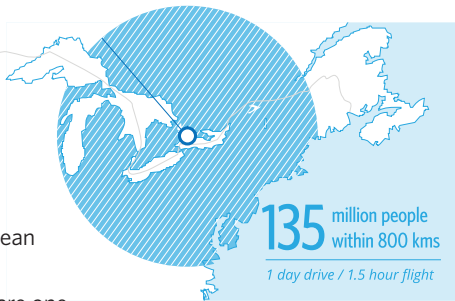
²KPMG Competitive Alternatives 2014



1,400
multinational firms
call Mississauga home.

TRAVEL • ACCESS • PROXIMITY

- Pivotal location for distribution of products and logistical and transportation requirements
- Less than a 90-minute drive to the U.S. border – Canada’s major aerospace export market
- Direct access to the \$19 trillion NAFTA market
- Extensive network of 7 major highways and 3 principle railways
- Direct access to all lake ports and the Atlantic Ocean via St. Lawrence Seaway
- As a part of the Greater Toronto Area (GTA), we are one of North America’s largest business centres with a population of 6 million – the largest urban agglomeration in Canada



TRAINED • TRIED • TALENTED

- Home to a strong creative class of scientists, technicians and engineers that build technologies and innovations used globally
- Access to a labour pool of over 4.3 million people within the GTA, representing nearly half of Ontario’s labour force
- 6 colleges and 4 universities within commuting distance offer 31 aerospace-related programs
- Over 55,700 full-time foreign students enrolled in colleges and universities within commuting distance
- A leader in recruitment and retention of a highly skilled workforce with equal opportunity laws, government-mandated health and retirement benefits, and high quality training facilities
- Standard practice of continuous improvement and lean management approaches engrained in our workforce
- Reduced training costs for employers with the average Ontario worker staying with a company for close to nine years

66%
of workforce
population with
post-secondary
education



“Mississauga will continue to account for approximately 35% of our R&D initiatives in Canada and we are equally proud of the numerous collaborative programs we have in place with universities and technical colleges to ensure a steady injection of talent and technology.” — Edward Hoskin, Vice President, Engine Development Programs, Pratt & Whitney Canada

MOVE # CONNECT # ACCELERATE

- Home to Pearson International Airport, Canada's largest and North America's 2nd busiest airport
- Pearson has more than a dozen cargo airlines serving over 180 destinations globally and 33 million passengers annually
- Pearson processes over 45% of Canada's air cargo
- Over 240 truck loading doors, 1.2 million square feet of on-airport warehouse space, capable of processing 1 million metric tonnes of cargo annually
- \$31.7 billion of goods processed through Toronto Pearson Port of Entry
- \$6.5 billion in aerospace products and services are exported to more than 80 countries from Ontario
- Ontario is a member of the North American defense industrial base, enabling Ontario businesses access to USA military projects

OUR AEROSPACE COMMUNITY

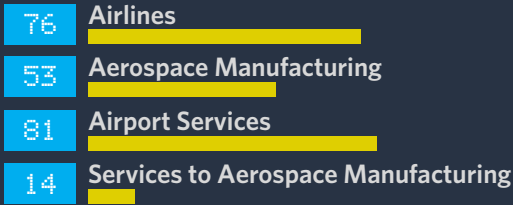
Mississauga's aerospace cluster is home to many of the world's leading companies including 2 of the 25 global aerospace companies.

- 2 Source Manufacturing Ltd.
- Aviall Canada Ltd.
- Avion Technologies Inc.
- Bohler Uddeholm Ltd.
- B & R Machine Co. Limited
- Bohler Uddeholm Ltd.
- CHEP Aerospace Solutions
- Curtiss-Wright Controls - Indal Technologies Inc.
- Cyclone Manufacturing Inc.
- Exactatherm Ltd.
- Field Aviation Company Inc.
- Honeywell[†]
- Hope Aero Propeller & Components Inc.
- Koss Aerospace
- L-3 Communications, CMRO
- Lakefront Mfg. Inc.
- Luxell Technologies
- Magellan Aerospace Corp.
- Maxwell Aero Maintenance Ltd.
- Microsat Systems Canada Inc.
- Mitsubishi Heavy Industries Canada Aerospace Inc.^{*}
- N A V Canada
- N T N Bearing Corporation of Canada
- P P G Aerospace
- Panasonic Avionics
- Pratt & Whitney Canada Inc.
- Q 1 Aviation Ltd.
- Rolled Alloys Canada Inc.
- S-3 Industries Ltd.
- Samuel Son & Co. Ltd.
- SimEx Inc.
- Sumitomo Precision Products Canada Aircraft Inc.
- Trinity Aerospace
- Vantage Precision
- Venture Aviation
- Wright Instruments Ltd.

[†] Global aerospace companies



AEROSPACE SUB-SECTORS, # OF BUSINESSES, 2014

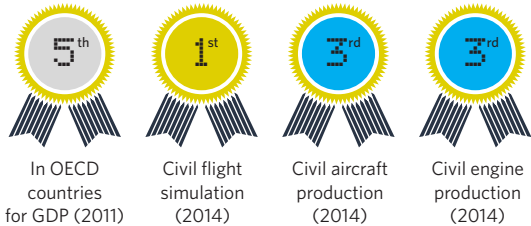


Figures may not add up as some companies are included in more than one sub-sector.
Source: City of Mississauga, 2014 Employment Database

- The Canadian aerospace industry is fast growing and innovative, contributing more than \$29B to GDP and 180,000 to employment in the Canadian economy in 2014³



CANADIAN AEROSPACE MANUFACTURING RANKINGS⁴



³Includes indirect and induced impacts

⁴Source: AIAC, The State of the Canadian Aerospace Industry 2015

Making the next breakthrough isn't about luck. It's about talent, pure and simple. The brightest minds, specialized education, the insatiably curious - all blended in this unique sector of the knowledge economy. The race is always on in Aerospace, and Mississauga, Ontario - Canada, is where great companies build winning teams. *What else do you need to know?*

Visit winthehumanrace.ca
to start now.

