

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 27,000 people in over 320 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 with a 14.6% cost advantage over 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 2016

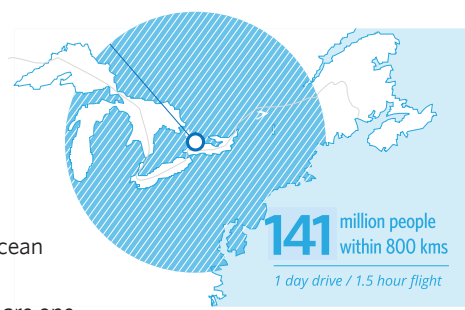


1,400
multinational firms
call Mississauga home.

“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

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



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 44 million passengers annually
- Pearson processes over 45% of Canada's air cargo (500,000 tons)
- 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
- Largest 2 hour flight catchment area in North America with access to 150 million people (larger 2 hour catchment area than New York City, Chicago and LA)

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
- Within close proximity to the new Centennial College Downsview Park Aerospace Campus, specializing in aerospace and aviation-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



OUR AEROSPACE COMMUNITY

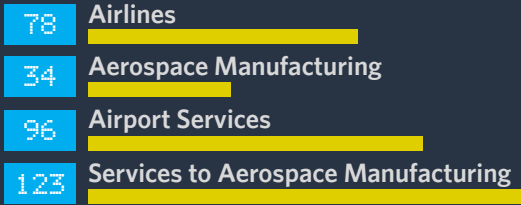
Mississauga's aerospace cluster is home to many of the world's leading companies including 4 of the 25 global aerospace companies.

- 2Source Manufacturing Ltd.
- Aviall Canada Ltd.
- Avicast
- Avion Technologies Inc.
- 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.
- General Electric Canada*
- Honeywell*
- Hope Aero Propeller & Components Inc.
- Koss Aerospace
- Luxell Technologies
- M X Aerospace Services Inc.
- Magellan Aerospace Corp.*
- Menzies Aviation
- 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.
- Reil Industrial Enterprises Ltd.
- Rolled Alloys Canada Inc.
- Samuel Son & Co. Ltd.
- Shannon Rewinds
- Starvoy Technologies
- Sumitomo Precision Products Canada Aircraft Inc.
- Trio Tech Inc.
- Vantage Precision
- Venture Aviation
- Wright Instruments Ltd.

* Global aerospace companies

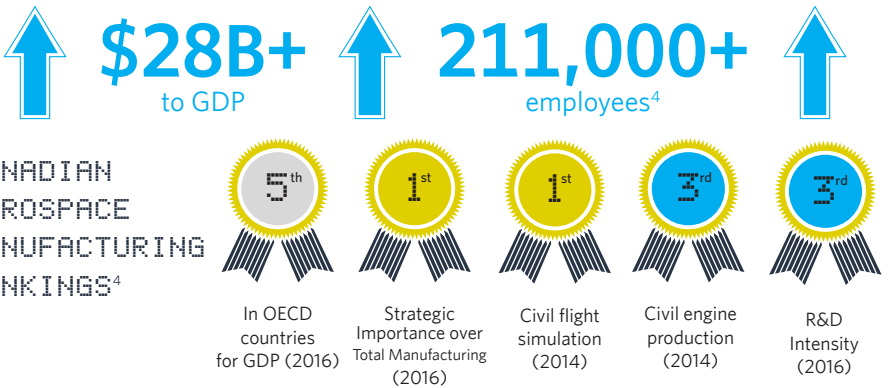


AEROSPACE SUB-SECTORS, # OF BUSINESSES, 2015



Figures may not add up as some companies are included in more than one sub-sector.
Source: City of Mississauga, 2015 Employment Database

- The Canadian aerospace industry contributed more than \$28 B to GDP and 211,000 in employment to the Canadian economy in 2015³



³ Includes direct, indirect and induced impacts

⁴ Source: Innovation, Science and Economic Development Canada and AIAC, State of Canada's Aerospace Industry 2016

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.

