

Defense & Aerospace Road Show : Seoul



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Downtown Montréal

01 Québec, a Major Economic Player in North America

Québec, a driving force of the Canadian economy



Population

- **8.5 million residents**
(23% of Canada's population)
- **14% of the population is foreign-born**



Open economy

- **\$442B in GDP** in 2020
- **\$187B in exported goods and services** within Canada and internationally, in 2020*



Strategic location

- **Sharing a 813-km border** with the United States
- **Commercial gateway** between America and Europe



* Unless otherwise specified, data expressed in terms of balance of payments.

Source: Statistics Canada, Table 36-10-0402-01, Table 17-10-0134-01, 2016 Census; Investissement Québec International, "2018–2019 Annual Report" ; Government of Québec Budget, 2021–2022.



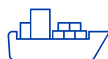
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02 A Global Aerospace Hub

Québec, 1st aerospace hub in Canada and one of the largest in the world



50%+ of the Canadian aerospace sector capability



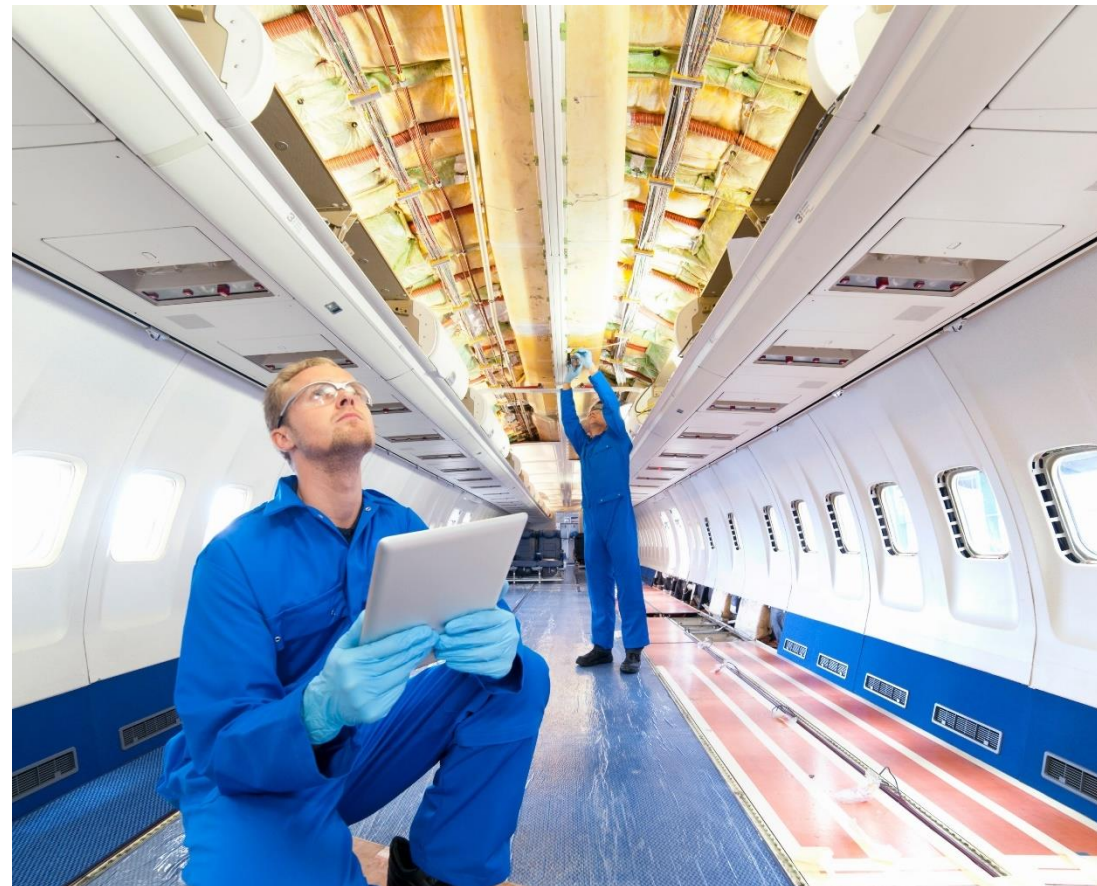
1st sector in terms of exports in Québec, with 75% of the production exported outside Canada to over a hundred countries



Sales totalling nearly \$16B, with 5% growth per year for more than 25 years



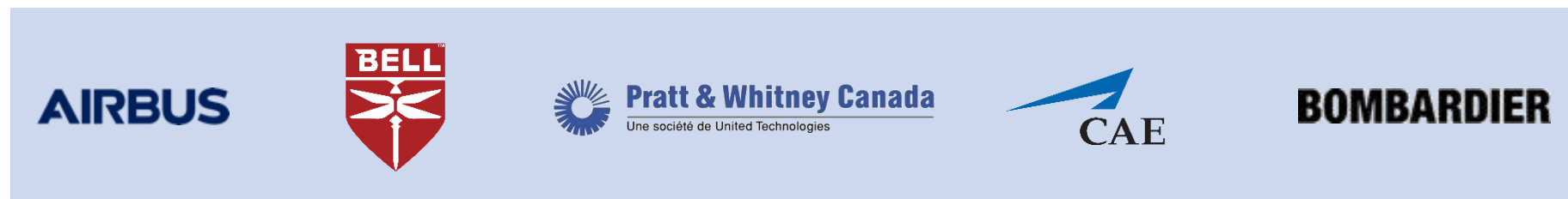
A complete support ecosystem, including prime contractors, suppliers, research centres, universities, major international organizations (IATA, ICAO), etc.



Source: Institut de la statistique du Québec, International Trade Data Online (ITDO), 2020 ; Ministère de l'Économie et de l'Innovation, "Faits saillants de l'industrie aérospatiale québécoise", 2020.

World-class companies driving the industry

5
prime
contractors



15+
equipment
manufacturers,
integrators and
MRO providers

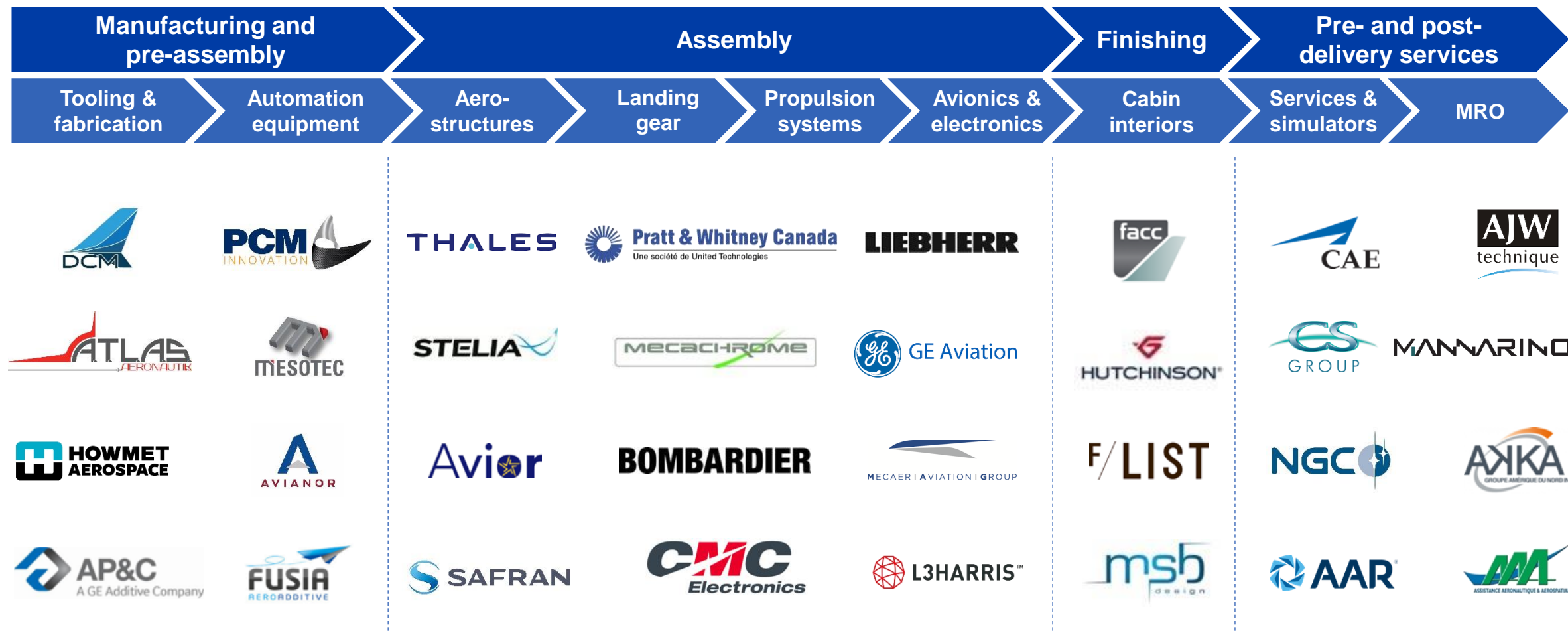


Close to
200
subcontractors
and suppliers



Source: Aéro Montréal, 2021.

An ecosystem of suppliers with a wide range of technological capabilities



Note: A company may belong to more than one category. Non-exhaustive list.
 Source: Adapted from EDC, "Canadian Aerospace Sector Value Chain", 2021.

And many more!

Security and defence companies that stand out



- **28% of jobs** in the Canadian defence sector are in Québec
- Approximately **1/3 of national exports** come from Québec
- **Various areas of expertise**, including the airborne sensor sector, as well as aircraft simulation systems

World-class companies on the territory, including:



And many more!

Source: Government of Canada, "State of Canada's Defence Industry", 2018 ; Sécurité et Défense du Québec, 2021.



03 An Opportunity to Fulfill Your Procurement Needs in Québec

A range of providers selected to meet your needs



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<https://adventuretactical.com>

Adventure Tactical Inc.

Description

Adventure Tactical Inc. is celebrating 30 Years in business as the premier manufacturer of advanced, lightweight, compact and resilient products and solutions, in use ***Where Success is Vital®***.

For three decades now, Adventure Tactical's solutions have been in theater with the Elite Special Forces of NATO and their Allies across the world, in addition to Search and Rescue Teams and Law Enforcement Agencies.

The brand's products and solutions focus on:

- Personnel Recovery and Identification Systems
- Vehicle Identification and Safety Systems
- Expeditionary Landing and Drop Zones
- Renewable Energy Man Portable Power Systems

Objectives

Adventure Tactical hopes to strengthen its presence in the Republic of Korea by introducing its cutting edge technologies to help save lives on the battlefield.

With the Republic of Korea Armed Forces as one of its largest clients in the world, Adventure Tactical hopes to expand its market in Korea to include other Government Agencies and front-line workers

Major Customers

Canada
United States of America
Brazil
United Kingdom
Finland
Sweden

France
Kingdom of Saudi Arabia
United Arab Emirates
Singapore
Republic of Korea
Japan
Taiwan
Australia



www.cel-aerospace.com

Description

CEL is a world leader in test equipment for aircraft engines; turboprops, helicopters, business and airline jets, as well as APUs (Auxiliary Power Units) and industrial applications.

Based in Canada at Sant-Hubert, Quebec and with facilities in Europe, Asia and the U.S.A., CEL offers the best aftersales support experience per our company approach and philosophy.

With more than 35 years in the engine and component testing business, we have earned the confidence of our customers, complemented by our strong relationships with the engine manufacturers and equipment suppliers.

High technology engineering forms the heart of CEL with a focus on innovative design to produce a wide range of turnkey test equipment including engine test cells (fixed, mobile and multi-engine capability), component test benches, expert data acquisition and control systems CELDAS™ and specialized research and development facilities.

CEL Aerospace

Objectives

CEL hopes to strengthen our presence in Korea by introducing various test equipment's for different aircraft engines with different major local players

Major Customers

Armed Forces, Airline operators, local aircraft integrators and MROs facilities.



cmcelectronics.ca

CMC Electronics

Description

Over past 100 years, CMC Electronics has achieved an international reputation for innovation and excellence in the design and manufacture of cutting-edge and customer-tailored cockpit systems integration as well as various FMS, GPS, Doppler velocity sensor, satcom antenna, electronic flight bag, multi-core modular open systems architecture avionics computer, headup display, aircraft internet server, micro-electronic and multi-functional display systems for various fixed-wing & rotary-wing military and civil aviation markets.

Based in Montreal, Canada, CMC Electronics has broad expertise and track records across multiple platforms and systems of various airframers, avionics system integrators and end-users around the world.

Objectives

CMC Electronics hopes to strengthen our presence in S. Korea by introducing various avionics systems for rotary, military trainer, transport, commercial aviation and business/special mission aircraft for both new OEM programs and aftermarket retrofit/upgrade projects.

Major Customers

Armed Forces, Government (Police, Fire, Coastal Guard, Medevac and Forestry) End Users and local aircraft integrators and MROs.



www.galvion.com

Description

Galvion designs, develops and delivers mission critical head, face, and torso protective solutions as well as intelligent power and data management systems for the world's most demanding military and tactical teams.

The company invests in the development of advanced concept, integrated systems that will be critical to meet the challenges of tomorrow and beyond.

With offices and facilities in three countries, Galvion has a robust infrastructure to support every phase of the product lifecycle - from conceptualization through design, prototyping and testing, manufacturing and beyond. Over the past 21 years, they have developed an international reputation as a trusted partner and a proven track record for excellence. Across their five facilities, their teams work both independently and collaboratively to proactively provide solutions that exceed expectation and imagination.

GALVION

Objectives

Galvion hopes to strengthen its presence in S. Korea by introducing various modern warfighter and tactical operator solutions that save lives.

Major Customers

U.S. Army, USMC, USCG, USSOCOM, Army National Guard, U.S. Air Force, Department of Homeland Security, U.S. Law Enforcement, UK Military and Police, Denmark, Canada, The Netherlands, Israel, UAE, Germany, Norway, NATO.

NETUR

Description

Nétur specializes in the development and machining of complex, high precision aerospace components. Based in Saint-Hubert on the south shore of Montreal, we also offer a wide range of supplementary vertically integrated solutions for component assembly, painting, and special processes.

We also provide to our customer precision machine and certified products fabricated from metallic powder, on our multiply additive manufacturing printers (Aluminium, Inconel and Titanium)

Our investments in talent, ongoing skills development, and efficient processes are your guarantee of innovative, top quality products.

Objectives

Netur hopes to strengthen presence in S. Korea by introducing aerospace solutions.

The company plans to gradually expand into Southeast Asia by setting up operations to better serve its global customer base.

Major Customers

Aerospace engine manufacturers and integrators like Pratt & Whitney, GE Aviation, Safran & Honeywell



www.qstc.space

Description

QSTC provides advanced space engineering solutions that integrate an innovative proprietary portfolio of satellite technologies and disruptive business solutions to support the domestic and international market through telecommunications, IoT, data science and additive manufacturing.

QSTC already possesses proven intellectual property and ready-to-build designs for space solutions, including commercial communication satellites, propulsion systems and unmanned orbital spacecraft.

QSTC Inc industry veteran with years of experience in Space industry. The senior management team includes executives with in-depth international experience in space, aerospace, logistics, security and risk management.

QSTC

Objectives

QSTC hopes to strengthen presence in S. Korea by introducing various spaces/defense solutions for defense Forces and different government agencies.

Major Customers

Space Micro, BlackArrow, Berlin Space, SpaceX, NASA, JAXA, ISRO and Leicester Space, Telespazio, PSN Indonesia, Intelsat, and SDA (USA)

Description

SpaceBridge Inc. is a provider of broadband satellite communications systems, technologies, and infrastructure. We are headquartered in Montreal, Canada, and renowned for our expertise in developing and delivering cutting-edge VSAT platforms, RF equipment, satellite network solutions, and comprehensive turnkey project implementation.

We specialize in implementing ingenious and collaborative business models that optimize CAPEX investments, resulting in substantial cost savings in network management and OPEX. By streamlining operations and expediting time-to-market, we empower our clients to achieve unparalleled efficiency and gain a decisive competitive advantage in the fast-paced world of satellite communications.

Satellite Communication

Objectives

Strengthen presence in South Korea by introducing various satellite network equipment and managed solutions for Thai, Indonesian and S. Korean Forces and different government agencies.

Major customers

- Military
- Cellular Backhaul
- Enterprise
- Government
- Mobility
- IoT
- Emergency Response
- Broadcast
- Consumer Broadband

A top-down view of several people's hands stacked in a circle, symbolizing teamwork and collaboration. The image is overlaid with a semi-transparent blue filter. The text 'Coorganizers and partners' is centered over the hands in a white, bold, sans-serif font. A thin white horizontal line is positioned below the text.

Coorganizers and partners

AÉRO MONTRÉAL

Description

Aéro Montréal, Quebec's aerospace cluster, represents the largest aerospace ecosystem in Canada.

With an exceptional concentration of 5 prime contractors, 15 specialised equipment manufacturers and a skilled workforce, Québec has the capacity to build an aircraft from A to Z in an industry representing sales of \$18 billion.

A catalyst for the industry's growth since 2006, Aéro Montréal brings together the entire Quebec aerospace sector in a unique cross-sectoral network that leverages the expertise and know-how of the cluster's players. The main objective is to promote the growth and competitiveness of the Quebec aerospace industry by implementing initiatives and projects that address the industry's major challenges.

Objectives

Aéro Montréal hopes to strengthen collaboration with South Korea Aerospace ecosystem and reinforce relation with various Aerospace Defense players including government agencies.

Thank you



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Vieux-Québec
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