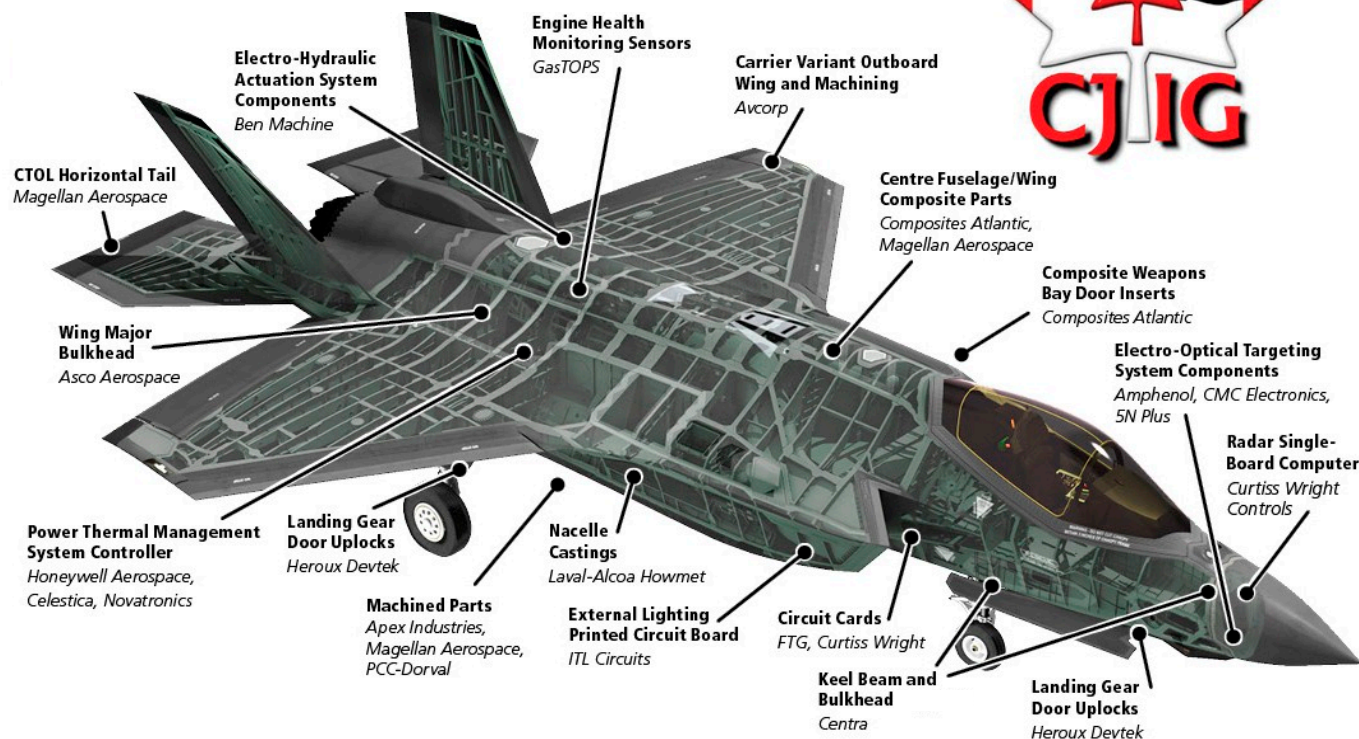




# F-35 JSF Canadian Aerospace Industrial Participation

## Manufacturing



## Other Canadian Industry Partners

**NGRAIN**

**Pratt & Whitney Canada**

**Epic Data**

**BuildIT**

**Interfast**

**CaseBank Technologies**

**MDS**

**Montreal Carbide**

**Excel Precision**

**Cross Manufacturing**

**Samuel**

**Kennametal Stellite**

**Nav-Aids**

**Univ. of Quebec – AMIL**

**Mindready Solutions**

**Nikon Metrology**

**OMX**

**Advanced Integration Technology (AIT)**

**Over \$750M in Contracts to Date  
& \$11B in Total Opportunities**

## The F-35 Opportunities

### Unprecedented Opportunities:

- State of the art technology transferred into Canadian firms
- Direct access to major global aerospace companies
- Long term program ( > 30 years)
- 4,000 Aircraft projected for more than 20 countries
- Diverse range of technologies

### Early Adaptation:

- Incorporating technology during the innovative stage
- Future competitive advantage through early adaptation
- Advanced manufacturing processes & design tools yield affordability, quality, & production efficiency for many years

### Global Access:

- Canadian companies integrated into global supply chains
- Canadian participation as both supplier and customer
- 37 Canadian companies working on the F-35 Program

### Positive Current & Future

### Economic Impact:

- Economic benefits began over 15 years prior to 1st projected delivery to Canada
- Over \$11 billion in total opportunities
- Canadian industry has invested over \$100M
- Over 53,000 person-years of projected employment
- More than \$750 million in contracts (all 3 variants)





# The F-35 Program

## Global

- 9 partnering nations (US, Canada, UK, Australia, Denmark, Norway, Netherlands, Turkey & Italy)
- 3 Non-Partner Country Sales (Israel, Japan & S. Korea)
- 3 Variants – High Commonality:
  - Conventional Take-Off & Landing (CTOL)
  - Short Take-Off Vertical Landing (STOVL)
  - Carrier Variant (CV)



## 4,000 Aircraft Projected

- 300+ aircraft delivered / on order
- More than 140 aircraft delivered
- 35 aircraft delivered in 2013
- 36 aircraft delivered in 2014



## F-35 Progress

- US Marines Initial Operating Capability July 2015
- More than 30,000 flying hours
- 3 US Services, UK, Australia & Netherlands aircraft flying
- Executing to development plan



CJIG Members - November 2014

# Canadian JSF Industry Group



Sept 2015