# YOUR **DEFENCE** PARTNER

ONTARIO CANADA

Ontario is Canada's defence industrial engine, bringing together advanced manufacturing expertise, world-leading innovation, secure supply chains, and sovereign capabilities to deliver mission-ready solutions for governments, armed forces and allied partners.

Ontario's strengths span air, land, sea, space and cyber, as well as the technologies that will define the future of defence, including artificial intelligence, quantum, autonomous systems, advanced materials, nuclear technologies and critical minerals.

Backed by resilient supply chains, a proven track record of export success, and the industrial capacity to strengthen the long-term security and economic resilience of Canada and its allies, Ontario is a trusted partner for investment, innovation and collaboration.

## **ONTARIO'S** DEFENCE ADVANTAGE

**44%** OF CANADA'S MANUFACTURING GDP

**3** **OF THE WORLD'S TOP 5** DEFENCE COMPANIES

**41%** OF CANADA'S DEFENCE WORKFORCE

**2nd** **LARGEST TECHNOLOGY SECTOR** IN NORTH AMERICA, CENTRED IN TORONTO AND WATERLOO

**300+** DEFENCE COMPANIES

## WHERE **ONTARIO** LEADS IN DEFENCE

### RESEARCH & TESTING

- Area X.O
- Automotive Centre of Excellence
- National Research Council Research Facilities
- NATO DIANA Test Centres
- Quantum Valley Ideas Lab
- Vector Institute for Artificial Intelligence

### PRODUCTS & TECHNOLOGY

- Armoured Vehicles
- Aerospace & Aircraft Systems
- C4ISR Systems
- Satellite & Space Technologies
- Naval Systems
- Uncrewed & Autonomous Systems
- Training & Simulation

### MILITARY INSTITUTIONS

- Ontario is home to 2 Canadian Mechanized Brigade Group in CFB Petawawa and 4th Canadian Division in Toronto
- CFB Trenton: Home of 8 Wing, responsible for strategic airlift, tactical airlift, air-to-air refueling, and search and rescue
- CFB Kingston: Canada's military command, communications, and cyber hub
- Royal Military College of Canada and Canadian Forces College are the premier institutions for developing future military leaders
- CFB North Bay: Operational headquarters for NORAD
- CFB Borden: Canada's largest military training base

# NEXT GENERATION DEFENCE TALENT

Ontario's deep talent pool and world-class institutions are powering the next-generation of defence capabilities. In addition to graduating 94,000 STEM students annually, Ontario employs 40,000 AI specialists and generates 1,100 new AI graduates each year. Through targeted investments in workforce development, Ontario is creating an ecosystem where companies can leverage a robust talent pool and integrated supply-chain to deliver on their growth and ambitions.

## MISSION CAPABILITIES

### 1. AIR

Globally recognized jurisdiction that can design, produce and certify an aircraft from nose to tail.

### 2. SEA

$7 billion in awarded contracts to support Canada's Arctic and Offshore Patrol Ships and River-class destroyers.

Ontario Shipyards is the largest Canadian-owned ship repair and construction facility on the Great Lakes.

### 3. LAND

Home to General Dynamics Land Systems–Canada and Roshel, two of North America's largest armoured vehicle manufacturers.

Home to five major vehicle manufacturers, Ford, GM, Honda, Toyota, and Stellantis, integrated with a supply network of 700 automotive parts suppliers, more than 500 tool, die and mould makers, and over 400 connected and autonomous vehicle companies.

### 4. CYBER

Home to 52% of Canada's cybersecurity companies, along world-class research facilities that are ready now to support next generation defence capabilities across the digital warfare landscape.

### 5. SPACE

53% of total space revenues and 41% of the total space workforce in Canada.

> "In an increasingly uncertain world, Ontario is a stable, reliable, and predictable partner, equipped with the talent, technology, and industrial strength required to deliver on generational defence opportunities."
>
> **Victor Fedeli**
> Minister of Economic Development, Job Creation and Trade

## HOME TO:

- Airbus
- Babcock Canada
- Bombardier
- Collins Aerospace
- Colt Canada
- Fairbanks Morse Defense
- Honeywell
- IMT Defence
- Lockheed Martin Canada
- L3Harris Technologies
- MDA Space
- Raytheon ELCAN
- Safran Landing Systems
- Thales Canada

**FOR MORE INFORMATION ABOUT ONTARIO'S DEFENCE SECTOR:**

SourceFromOntario.com | InvestOntario.ca

Ontario

All figures are in Canadian dollars unless otherwise noted.
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