

Québec



a leader in aerospace

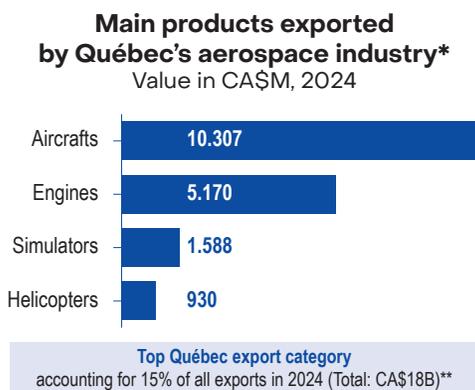
Québec's aerospace industry is one of the largest and most dynamic in North America, representing a truly world-class industrial ecosystem, fostering innovation and bolstering international growth. It encompasses a diverse array of activities, including aircraft manufacturing, avionics, and advanced technologies, supported by a strong network of over 235 companies. The industry is known for its innovation, with a focus on research and development, particularly in areas like sustainable aviation and electrification. The sector has also seen robust export performance, with a substantial percentage of production shipped internationally.



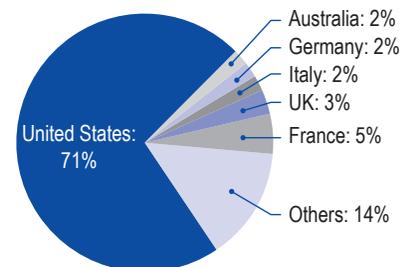
Economic Impact and Growth

- In 2024, the sector achieved sales of \$22.8 billion, a 3.4% increase compared to 2023.
- The industry reinvests about 12% (2023) of its GDP into research and development, fostering innovation and maintaining competitiveness.
- It supports around 43,100 manufacturing jobs, which includes a wide range of skilled positions across various companies.
- Aircrafts are the top export category, contributing significantly to Québec's overall export revenue with the United States being the primary market for Québec's aerospace exports.

Québec's aerospace products shine in foreign markets



Top destinations (outside Canada) for Québec aerospace export***
% share, 2023



* Based on HS product codes : Aircrafts (880220, 880230, 880240), Engines (840710, 840910, 841111, 841112, 841121, 841122, 841191), Simulators (880521, 880529), Helicopters (880211, 880212).

** Based on NAPCS product codes : 42111, 43111, 43112.

*** Based on NAPCS product codes (C21 Aircraft and other transportation equipment and parts).

Source : Statistique Canada, Division du commerce et des comptes internationaux et Institut de la statistique du Québec, Direction des statistiques économiques, Commerce international en ligne (CIEL), « Commerce international par produit du Québec et du Canada (SH) »; et « Valeur des exportations internationales par produit, Québec et Canada, cumulatif en décembre, 2022 et 2023 », mise à jour le 16 mai 2024; StatCan, Commerce international de marchandises par province, par produit et les principaux partenaires commerciaux (mensuel), Tableau 12-10-0175-01, 3 juillet 2024.



Industry Structure

- The industry comprises 235 companies, 6 prime contractors, 15 first-tier partners, and more than 200 specialized suppliers, mainly SMEs.
- Key prime contractors in Québec include Airbus Canada, Bell Textron Canada, Bombardier Inc., CAE Inc., Pratt & Whitney Canada and Boeing.
- Québec's subcontractors in the aerospace supply chain are specialized in Manufacturing and Pre-Assembly, Assembly, Finishing and Pre and Post Delivery Services.

Québec boasts a complete aerospace ecosystem

235
companies in Québec

43,000+
manufacturing jobs

20,000+
jobs in air transport,
navigation and
maintenance

\$22.8B
in sales, in 2024

6
prime contractors



15+
manufacturers,
integrators and MRO
service providers



Source : Aéro Montréal, 2021; Gouvernement du Québec, « Stratégie québécoise de l'aérospatiale - Horizon 2026. » 2022; Enquête statistique du ministère de l'Économie, de l'Innovation et de l'Énergie (MEIE), 2023 (publiée le : 25 avril 2024); Comité sectoriel de la main-d'œuvre en aérospatiale (CAMAQ), Recensement 2023-2025 des prévisions de main-d'œuvre de l'industrie, 2023; Direction de l'Intelligence économique analysis, IQ, economie.gouv.qc.ca/bibliotheques/le-secteur/aerospatiale/presentation-de-lindustrie-de-laerospatiale.



Research and Development Hub

- Greater Montréal is home to 75% of Canada's aerospace R&D.
- Québec's aerospace companies are some of the biggest R&D investors in Canada: Pratt & Whitney Canada, CAE, Bombardier, Thales Canada and Héroux-Devtek.
- Notable research organizations include Aéro Montréal (Québec's Aerospace Cluster and strategic think tank regrouping all the major decision makers), CRIAQ, NRCC, CSA, and CTA.



Emerging Technologies and Innovation Zones

- The unmanned aerial systems (UAS) industry in Québec is expanding rapidly, featuring over 100 specialized companies developing drones for a wide range of applications and Canada's first R&D testing site for UAS.
- Espace Aéro, an innovation zone in Greater Montréal, dedicated to prioritizing decarbonization and improving aircraft autonomy and safety.
- The Drone Center of Excellence is the main center specializing in civil Remotely Piloted Aircraft Systems and one of only two places in Canada where RPAS can be flown outside the line of sight.



Government Support and Environmental Initiatives

- Both provincial and federal governments provide substantial financial backing for the aerospace industry, emphasizing R&D and innovation.
- Projects promoting environmentally friendly aeronautics can receive government support, illustrated by Bombardier's eco-responsible Challenger 3500 and initiatives like Ricardo's decarbonization center and H55's electric propulsion systems, aligning with Canada's National Defense procurement standards.



International Organizations

- With its vibrant innovative ecosystem and dynamic industries, Montréal plays a crucial role for a safer and sustainable aviation for the next generations alongside nearly 15 international civil aviation organizations established on its territory, making it the "civil aviation world capital".



Québec's aerospace industry presents an exciting opportunity for collaboration and innovation. The province's strong commitment to research and development, coupled with government support for sustainable practices, positions Québec at the forefront of cutting-edge trends like advanced air mobility and electrification. By engaging with this vibrant aerospace ecosystem, stakeholders can tap into a rich landscape of talent, technology, and collaboration, driving both personal and organizational growth in an increasingly competitive global market.

Contact us

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