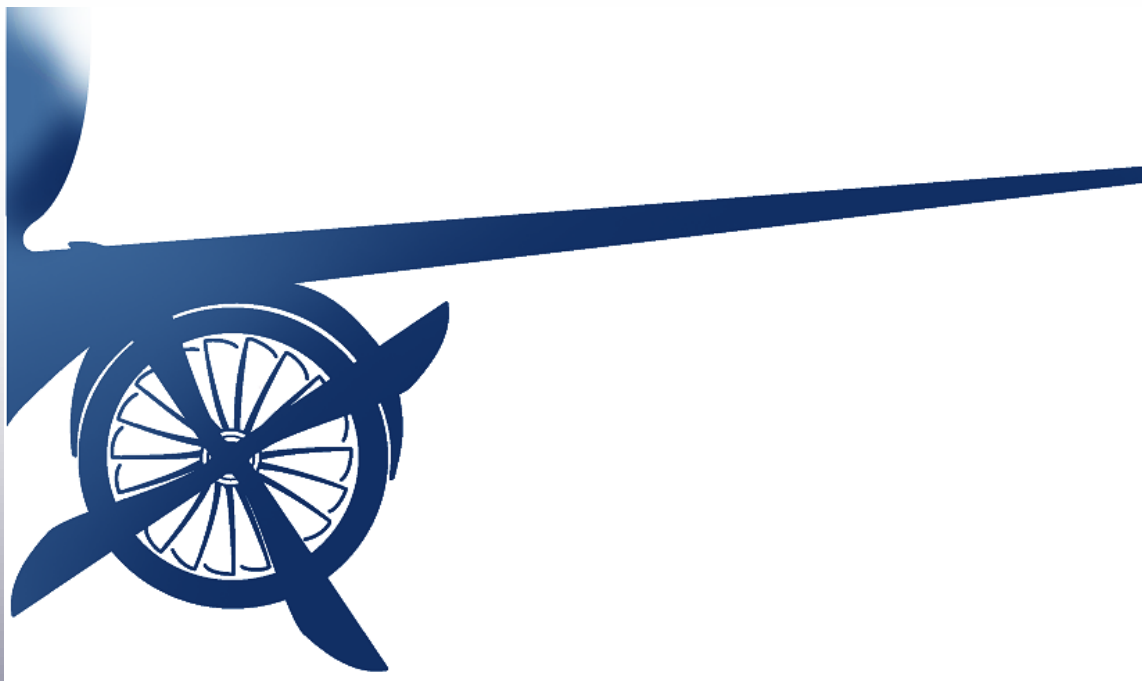


Vol. 1, no 10, Dec. 2014

Intell-Écho

Thematic Information Bulletin

The Economic Information Observatory (EIO) for Regional Cooperation between
Atlantic Canada and Saint-Pierre and Miquelon



Aerospace Industry

Saint-Pierre and Miquelon : p. 1

Atlantic Canada : p. 5



The Economic Information Observatory (EIO) for Regional Cooperation between Atlantic Canada and Saint Pierre and Miquelon

Intell-Écho : Thematic Information Bulletin

Are you looking for business opportunities in this sector?
CACIMA and FCCC-AN can facilitate your exploration and partnership initiatives.
(see contact details on page 8)

Intell-Écho, vol. 1, n°10, 2014

ISSN 2272-0219

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Editorial Production:

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Information Policy: The aim of this project is to provide useful information to stakeholders seeking to promote regional cooperation between Atlantic Canada and Saint-Pierre and Miquelon. Information supplied herein may be used on the condition that the *Intell-Écho* bulletin be cited as a source.

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The Aeronautics industry

47,9 billion euros in sales in 2013.
An **increase of 9%**.

30,4 billion euros in exports which have experienced a strong growth **(+11,4%)**.

Equipment manufacturers and SMEs in the Supply Chain show **sales revenues estimated at 15.1 billion euros (+7%) and 13.3 billion euros in orders (+12%)**.

In terms of orders, 2013 was a record year with **73.1 billion euros in orders, an increase of 49%** when compared to 2012, mainly due to the civilian sector which represents **84% of the volume of orders received**.

177000 people working in the profession, **13 000 new hires** et **6000 net jobs created**

Source : GIFAS



NAFAN (North American French Aerospace Network)

NAFAN (North American French Aerospace Network) is an informal network **which brings together French companies that are located in or exporting to North America or that are exploring the North American market**. Arising from a partnership between GIFAS (see page 2) and UBIFRANCE (French Agency for International Business Development), this initiative aims to :

- ◊ **Connect** the French players in the North American aerospace market ;
- ◊ Permit companies that are not yet established in the North American market **to benefit from the expertise** of established companies ;
- ◊ **Inform** members of the latest developments in the North American market (opportunities, current regulations, technical information...).

<http://www.nafan-aerospace.com/cms/fr/home>



The Aeronautics industry in Saint-Pierre et Miquelon

Locally the aeronautical activity focuses on the **operation and maintenance of the ATR 42-500**.

This turboprop aircraft was chosen for its **performance in difficult conditions** (takeoff / landing distance, stability in crosswinds, snow-covered runway etc.). This is a new aircraft that has the latest technology and features the best equipment in its class.

This specific choice (only 4 aircraft in North America,) as well as the distance from the manufacturer (Toulouse), entails the **need for a qualified maintenance team** (PART145 approval), suitable equipment and a substantial stock of parts.

This team consists of 12 people including 6 specialized mechanics who have a license specific to the ATR.

As a result, the team has **expertise that is unique on the continent**.

Key figures



A sector driven by the growth of the civil air transport market

The aeronautics industry is driven upwards by the improving financial prospects of airlines:

- ◊ **Resumption of economic growth** in most regions of the world.
- ◊ A demand for air transport that **remained high during 2013**.
- ◊ A **5.9% increase in revenue passenger-kilometers (RPK)** for 2014 (forecast).
- ◊ A second consecutive year of **improved profitability**.

Source : IATA

GIFAS (Groupement des Industries Françaises Aéronautiques et Spatiales)

GIFAS is **an industry association which includes 332 members** (major prime contractors and SMEs) which specialize in the design, development, production, marketing and maintenance of **all aerospace programs and materials**.

Its activities extend from civil and military aircraft and helicopters to engines, missiles and weapons, drones, satellites and space launchers, major aerospace defence and security systems, equipment, subassemblies and associated software.

<https://www.gifas.asso.fr/fr/>



A highly innovative market

Aerospace industry-wide R&D accounts for the equivalent of **14.7% of sales, including 70% of which is self-financed by the manufacturers**.

GIFAS companies account for 20% of the national R & D.

The French government is committed to:

- Two projects which involve this sector in the **"New Industrial France"** plan (electric aircraft, electric propulsion satellites).
- A second program **"Investments for the Future"**, which receives substantial funding: **1.3 billion euros** for aeronautics and **1.5 billion euros** for the defense industries.



CORAC : CORAC is the Council for Civil Aeronautics Research (Conseil pour la Recherche Aéronautique Civile). It brings together **all of the French players in the air transport sector**, meaning the aeronautics industry, airlines, airports, ONERA, and relevant institutions and ministries. The establishment of CORAC represents a desire to ensure the **consistency of research and innovation efforts in the aeronautics sector**. Among its first achievements, it created the "technological road map for aeronautics research", which serves as the foundation for the implementation of an ambitious and coordinated research strategy focusing on objectives for management of the environmental footprint of air transport by 2020.

<http://www.aerorecherchecorac.com/>

A dynamic export industry

For 2013, the aeronautics and defense sector constituted **the first surplus position of the French trade balance, with 22 billion euros**.

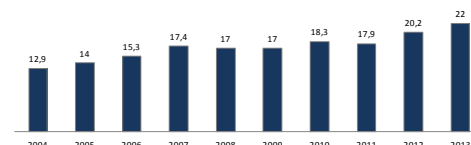
- Exports accounted for 79% of sales in this sector, up 11.4% over one year.
- The trend continued in 2014: in the first half, sales were **up 4.3%** when compared to the first half of 2013.

The Airbus deliveries account for **nearly 50% of total sector exports**.

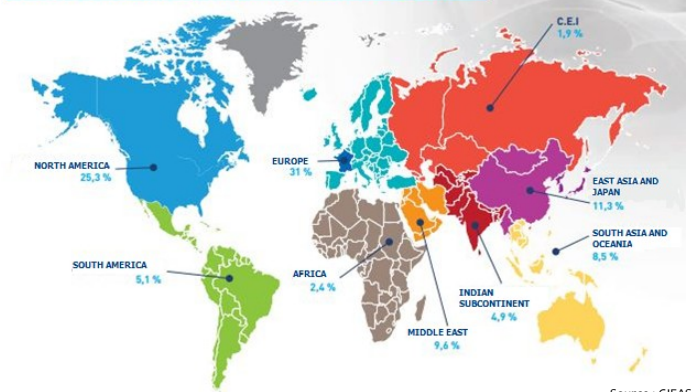
Airbus deliveries

	2010	2011	2012	2013
Value (in millions of euros)	18935	19020	22548	24997
Number of aircraft	285	271	296	317

Trade balance (in millions of euros)



Orders by geographical region (averaged over 10 years)



Source : GIFAS

A Word from an expert

Interview with Mr. Benoît Olano, President of Air Saint-Pierre.

Air Saint-Pierre is the local airline in Saint-Pierre and Miquelon. It operates two aircraft year-round: an ATR equipped with 46 seats which operates most of the international flights to Canada. And a Cessna F406 equipped with 8 seats, which operates most of the domestic flights, the flights to Sydney in July and August, as well as a 24/24 health watch in case an emergency evacuation to a hospital in Canada becomes necessary. (approximately 60 times per year).



Air Saint-Pierre :

18 rue Albert Briand, BP 4225,
97500 Saint-Pierre et Miquelon

Canada/US: 1-877-277-7765

International: +508-41-00-00

SPM: 05-08-41-00-00

www.airsaintpierre.com/



Can you briefly give us some figures to describe Air Saint-Pierre?

Air Saint-Pierre is an airline that was founded in 1964. It currently employs **42 people**. In terms of activity, it made **432 roundtrip international flights in 2013** (ie 864 trips) and transported **more than 25,000 passengers**.

In your opinion, what are the strong points of the company?

Air Saint-Pierre has three main advantages:

◊ **The local airport** which is a very nice facility, with high quality infrastructure and equipment that are perfectly suited to the ATR. The runway, which measures 1800m, is very well suited to our aircraft.

◊ **Pilot training**. In fact, the harsh conditions and remoteness necessitates more advanced training and specific skills, which all our pilots have.

◊ **The quality of the maintenance** and servicing of the aircraft (see p.1). Air Saint-Pierre is an independent company and keeps a particularly watchful eye on the maintenance of its equipment. Maintenance procedures are particularly extensive and the company is very careful on these points. As soon as a minor concern arises, it is taken care of immediately by our teams.

Finally, can you tell us about the company's prospects for development?

The main thrust of the company's development policy is to **consolidate and sustain existing operations**. The local context, our small size, and the limited market complicate the implementation of development strategies but opportunities still exist:

◊ Once again, our **specific expertise in maintenance** would allow us to work outside of Saint Pierre and Miquelon if the demand should arise. However, the Canadian legislation regarding foreign workers makes it difficult to do so.

◊ The creation of new routes is an avenue that we are exploring as well, like for example the flight to the îles de la Madeleine that we tested last summer. The difficulty here is to identify profitable destinations for the company. Indeed, the limited size of the local market complicates this approach.

◊ In terms of business development, Air Saint-Pierre focuses primarily on **the quality of service**. For example, we are currently working on the possibility of having WiFi access on board.

◊ Finally, in terms of investment, the company wants to remain **on the cutting edge with its equipment**. This is not easy in a sector where technology changes very quickly because it involves replacing aircraft more often than their normal life span, but it is an important aspect if we want **to continue to have the most up-to-date equipment and to maintain a high level of performance**.

Other avenues to explore in Saint-Pierre and Miquelon

The local airport is new and well equipped with **a category 3 ILS (Instrument landing system)**, the most highly performing level in case of very bad weather conditions. These features are **important assets** (Canada has only two airports in this category) that would allow Saint-Pierre and Miquelon to be well-positioned to offer a number of services:

◊ Stopovers for jets as a Fixed Base Operator (services, fuel, maintenance...). As such, it should be noted that a local company, Hardy SAS already operates two fuel dispensing stations at the airport. (Jet A1: 17,000 litres per hour, Avgas: 8,000 litres per hour).

◊ Partnerships with flight training schools.

◊ Stopovers for maintenance.

To assess the real value of these avenues (and identify others), it is necessary to think ahead to a trade policy that would allow us to exploit the potential of the airport by positioning itself intelligently in the regional context.

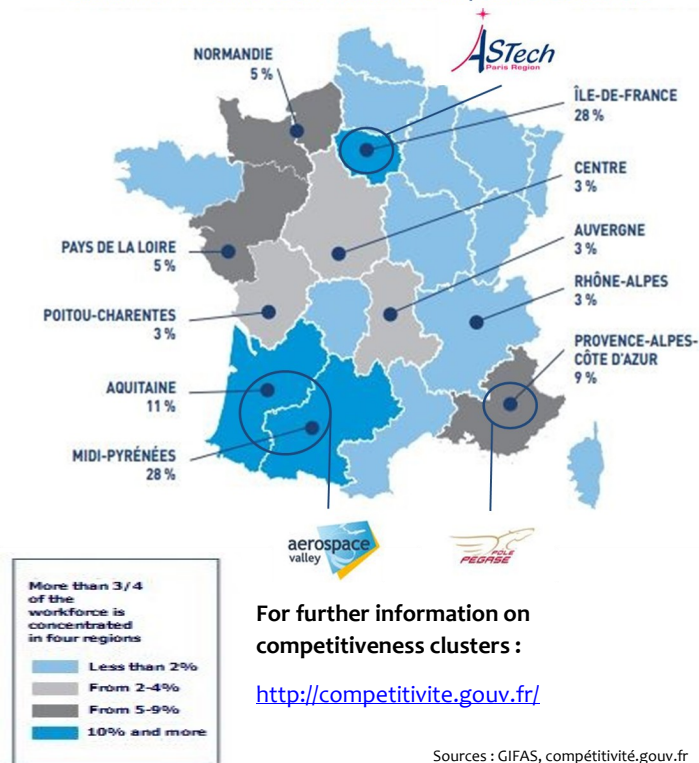
Upcoming events



Nom	Date	Lieu
International tradeshow of Aeronautics and Space	June 15-21, 2015	Le Bourget
France Air Expo : 9 ^e International of Aviation	Juin 2015 (to be determined)	Lyon
Aeronov' Connection 2015— European business meeting of Aeronautics and Space	February 4-5, 2015	Versailles
AeroMart Toulouse	December 2-4, 2014	Toulouse
European More Electric Aircraft conference	February 3-5, 2015	Toulouse

Useful Information

Distribution of workforce and location of competitiveness clusters



Focus on the aeronautics competitiveness clusters

Aerospace Valley : The Aerospace Valley World Competitiveness Cluster allies the Midi-Pyrenees & Aquitaine regions to constitute **Europe's leading pool of jobs in the field of aeronautics, space and embedded systems**. The objective of the cluster is to increase jobs in its territory in the fields of aeronautics, space, and embedded systems.

<http://www.aerospace-valley.com/>

ASTech Paris Region : located in Ile de France, the cluster has a R & D budget of **189 million euros**. The projects cover four major areas: business aviation, space transportation, propulsion and equipment.

<http://www.pole-astech.org/>

Pégase : the PEGASE cluster provides and implements **new avenues for growth** through the exploration of markets that are not within in the traditional areas of activity of the French and global aeronautics and space industry.

<http://www.pole-pegase.com/pole-pegase-3.html>

L'Institut de Recherche Technologique Saint-Exupéry : The Saint-Exupéry Technological Research Institute was created in 2013 as part of the government program "Investments for the Future". This institute, located **in Toulouse**, will work on three strategic areas : non-metallic materials, electric aircraft and embedded systems.

<http://www.irt-saintexupery.com/>

Links and contacts of potential interest



Export in France

Acquire french products or services

CCI France International :

<http://www.ccifrance-international.org/>

Agence pour les investissements Internationaux :

<http://www.invest-in-france.org/fr>

GIFAS :

<https://www.gifas.asso.fr/>

NAFAN :

<http://www.nafan-aerospace.com/cms/fr/home>

Principal sources of information utilized in this bulletin:

GIFAS, CORAC, NAFAN, IATA, Ministère des Finances et des comptes publics, competitivite.gouv.fr



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If you are seeking
business opportunities in this sector,

CACIMA and FCC-AN

can facilitate

your business prospection and

Help with establishing new
partnerships.



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Site : www.ccfcra.ca



The Economic Information Observatory (EIO) for
Regional Cooperation between
Atlantic Canada and Saint-Pierre and Miquelon

Intell-Écho: Thematic Information Bulletin

Atlantic Canada – 4 provinces:
Prince Edward Island (PEI),
New Brunswick (NB),
Nova Scotia (NS),
Newfoundland and Labrador (NL)

Are you looking for business opportunities in the region?
FCCC-AN and CACIMA can facilitate your exploration and partnership initiatives.
(see contact details on page 8)

Intell-Écho, vol. 1, no. 10, 2014
ISSN 2292-518X

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- Map: The Aerospace Industry in Atlantic Canada 8

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The Aerospace Industry in Atlantic Canada

The world's third-largest civil aircraft producer, Canada stands out for the performance of its aerospace industry, the fifth-largest globally. With 22% growth of its civil aircraft production projected for 2014-2021 in comparison to around 11% average growth worldwide over the same time period, Canada boasts more than 700 companies and 172,000 workers in this strategically important economic sector. Generating more than \$25 billion in direct revenue in 2013, this industry positions Canada second after only France for revenue from aerospace product-related manufacturing and jobs in proportion to population, ahead of both the United States (ranked 3rd) and the United Kingdom (4th).

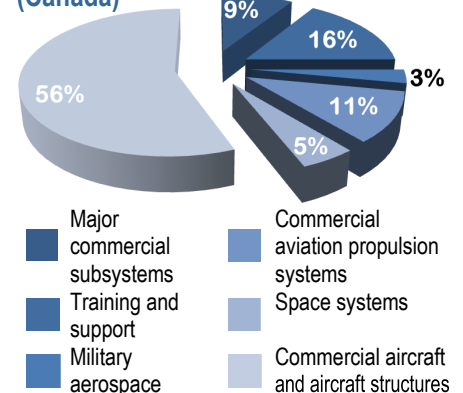
"Canada's aerospace industry is one of the pillars of the Canadian economy. [Canada is setting the right conditions] to ensure that the aerospace industry and all Canadian businesses continue to compete and succeed on the world stage."

- James Moore
Industry Minister

Canada's aerospace industry compared to that of other OECD countries

- #1 Productivity
- #1 Strategic importance among other manufacturing sectors
- #3 R&D investment intensity
- #5 Revenue as a percentage of GDP

Aerospace sector (Canada)



Atlantic Canada (AC), which accounts for 7% of national aerospace manufacturing, is achieving significant growth through the presence of a number of leading actors, among them General Dynamics, Lockheed Martin, Honeywell, Pratt & Whitney, Sikorsky Aircraft and Rolls-Royce. The aerospace sector includes companies working in airspace, component production and instrumentation as well as maintenance, repair and overhaul services.

Industry expertise in Atlantic Canada

- Manufacture of aircraft, missiles and unmanned aerial vehicles
- Manufacture of major assemblies and components
- Manufacture of aircraft engines and parts
- Avionics and electronics systems
- Aircraft maintenance, repair and overhaul
- Space station equipment
- Aerospace and space research

Some of the occupations in greatest demand in the aerospace and defence manufacturing sector

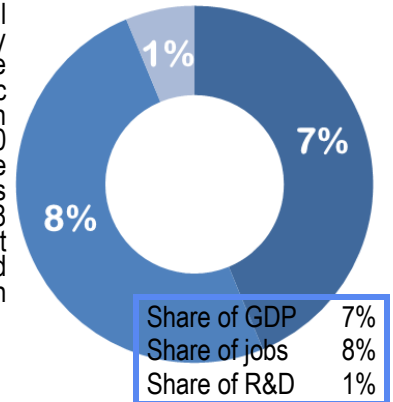
- Metalworking machine operators
- Instructional designers
- Machinists
- Air pilots, flight engineers and flying instructors
- Supervisors
- Aircraft mechanics and aircraft inspectors
- Specialized welders
- Structural metal and platework fabricators and fitters
- Electronics assemblers, fabricators and testers

The Aerospace Industry: Key Facts and Figures *(most recent available statistics)*

In 2010, the aerospace industry generated more than \$1.25 billion in Atlantic Canada, compared to \$22.19 billion for Canada as a whole. Thanks to a range of investment initiatives, the sector is also experiencing significant growth in the region and today employs more than 10% of the country's skilled workforce, or more than 7,900 workers. Moreover, Atlantic Canada posted the strongest growth nationwide in aerospace products manufacturing for 2008-2013. The aerospace industry has consequently developed strategic importance for regional economies, and New Brunswick, as part of its Strategic Framework to Support Priority Growth Sectors in New Brunswick 2012-2016, has previously identified aerospace as a leading strategic economic sector.

AC share of overall aerospace activities

The national aerospace industry contributed some \$550 million to Atlantic Canada's GDP in 2009. Every \$100 million in aerospace industry outputs generated \$13.8 million in direct economic benefits and \$36.8 million in indirect benefits.



...also has

- more than 200 aerospace and defence companies
- more than 10,000 full-time skilled workers
- annual sales of more than \$1 billion
- 7 military facilities including 3 superbases

Atlantic Canada...

Aerospace exports from Atlantic Canada (2007)

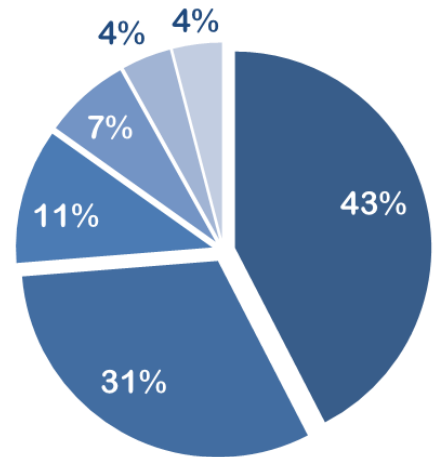
7% of exports go to France

31% of exports go to US

Number of aerospace manufacturing establishments	
PEI	6
NB	3
NS	12
NL	3

Skilled labour costs in the aerospace sector in Canada are 18% lower than in the US

Revenue of Canadian aerospace industry by subsector, 2011



- Aircraft, parts and components
- Avionics and electronics systems
- Maintenance, repair, overhaul
- Simulation and training
- Aircraft engines and parts
- Other

Support and participation at various government levels contributing to development of the aerospace industry

Federal

The national **Canada First Defence Strategy** of 2008-2009 set out a detailed roadmap for modernizing all three branches of the Canadian Forces at an investment of \$240 billion, including \$60 billion allocated to the purchase and positioning of equipment for the 2008-2027 period. Notable procurement initiatives in the aerospace sector include the following:

(Note: Projects are subject to the **Industrial and Regional Benefits Policy**; please see *Intell-Écho*, 1, 7, 2014)

- ▶ Purchase of next-generation fighter aircraft, 2017-2020 \$9 billion
- ▶ Replacement of search and rescue aircraft, 2015-2020 \$3.8 billion
- ▶ Acquisition of uninhabited surveillance systems, date TBA \$1 billion

Provincial (examples)

INNOV8 Program in NB providing financial assistance to aerospace and other priority growth sectors
 Export Development Program in NB supporting companies seeking new markets
 Aerospace and Defence Loan Program in NS assisting companies in covering certain non-recurring expenses

25%

Aerospace's share of the national defence sector

60%

Share of national defence R&D funds allocated to aerospace

Aerospace Development and Training in Atlantic Canada

The **Aerospace Industries Association of Canada (AIAC)**, the leading professional association in the Canadian aerospace industries, represents the interests of some 700 companies operating in the commercial, defence and security, and space sectors. The AIAC works closely with public partners in promoting Canada's aerospace industry to help ensure that it remains competitive through the implementation of policies and initiatives to guide the future of the industry, whether in the areas of innovation, development of new markets, access to emerging markets or new investment.

The future of the aerospace industry in Canada (Emerson Report – 2012)

In 2012, the Government of Canada mandated a committee of experts to conduct a review of programs and policies in the Canadian aerospace industry with a view to defining strategies for the future. The AIAC has been working with the Canadian government to implement the 25 recommendations in the report, the most important of which include:

- Creating a **Consortium for Aerospace Research and Innovation in Canada**; developing a national network for technical collaboration involving the industry and the academic community (active)
- Incorporating the aerospace industry as a key sector into the **Global Markets Action Plan** governing Canadian trade policy abroad
- **Renewing funding** of the Strategic Aerospace and Defence Initiative and the Space Technologies Development Program; developing a large-scale technology demonstration program.

Canadian aerospace associations and structures

National

- Aerospace Industries Association of Canada (AIAC)
- Canadian Association of Defence and Security Industries (CADSI)
- Canadian Space Agency
- Consortium for Aerospace Research and Innovation in Canada (CARIC)

Atlantic Canada

- Atlantic Alliance of Aerospace and Defence Associations (AAADA)

Provincial

- Aerospace Association of PEI (AAPEI)
- New Brunswick Aerospace and Defence Association (NBADA)
- Aerospace & Defence Industries Association of Nova Scotia (ADIANS)
- Aerospace & Defence Industry Association of Newfoundland and Labrador (ADIANL)

Training and skills

PEI	Holland College <ul style="list-style-type: none"> ■ Aircraft Engine Repair and Overhaul ■ Electromechanical Technician ■ Precision Machinist
NB	NB Community College <ul style="list-style-type: none"> ■ Aircraft Maintenance ■ CNC Machinist
	Moncton Flight College <ul style="list-style-type: none"> ■ Aviation Technology ■ Pilot Training
	University of New Brunswick <ul style="list-style-type: none"> ■ Certificate in Bus. Admin. with concentration in Aviation and Operations Management
	Mount Allison University <ul style="list-style-type: none"> ■ Joint B.Sc. in Aviation
NS	NS Community College <ul style="list-style-type: none"> ■ Commercial Pilot and Aircraft Technician ■ Aircraft Flight Dispatcher ■ Composites Technician
NL	GFT Aerospace College <ul style="list-style-type: none"> ■ Pilot Training ■ Composite Repair ■ Aviation Welding
	College of the North Atlantic <ul style="list-style-type: none"> ■ Aircraft Maintenance and Repair ■ Electronics Engineering Technology

Calendar of events

- ▶ **Canadian Defence Security and Aerospace Exhibition Atlantic**
September 3-5, 2014, Halifax NS
DEFSEC, AAADA
- ▶ **Canadian Aerospace Summit**
November 18-19, 2014, Ottawa, ON
AIAC
- ▶ **CANSEC 2015**
May 27-28, 2015 – Ottawa, ON
Canadian Association of Defence and Security Industries (CADSI)
- ▶ **Presence at Paris Air Show**
June 15-21, 2015, Le Bourget, France
AIAC

Industrial clusters

- | | |
|------------|--|
| PEI | Slemon Park Corporation <ul style="list-style-type: none"> ◇ Cluster of the province's leading actors in aerospace and one of the largest centres in AC ◇ Located onsite at Summerside Airport ◇ More than 600 ha of business park space |
| NS | Aerotech Business Park <ul style="list-style-type: none"> ◇ Adjacent to Halifax International Airport ◇ More than 18 companies ◇ More than 2000 workers |

International manufacturing standards are applicable in Canada, including:

- ISO certification (e.g. ISO 9001)
- Federal Controlled Goods Program
- American Society of Mechanical Engineers standards



Map: The Aerospace Industry in Atlantic Canada



Links of interest if you are seeking to do business in this industry in Atlantic Canada

Aerospace Industries Association of Canada www.aiac.ca
 Canadian Association of Defence and Security Industries
www.defenceandsecurity.ca
 Consortium for Aerospace Research and Innovation in Canada
www.caric.ca

Aerospace Association of PEI www.aerospacepei.com
 New Brunswick Aerospace and Defence Association
www.nbada.ca
 Aerospace & Defence Industries Association of Nova Scotia
www.adians.ca
 Aerospace & Defence Industry Association of NL www.adianl.ca

Principal sources of information utilized in this bulletin:
 Industry Canada; Statistics Canada; PEI, NB, NS and NL government websites; specialized associations; media sources

CACIMA
 SAINT-PIERRE ET MIQUELON
 Faire avancer toutes les envies d'entreprendre

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If you are seeking business opportunities in this region, **CACIMA** and **FCCC-AN** can facilitate your business prospection process and help with establishing new partnerships

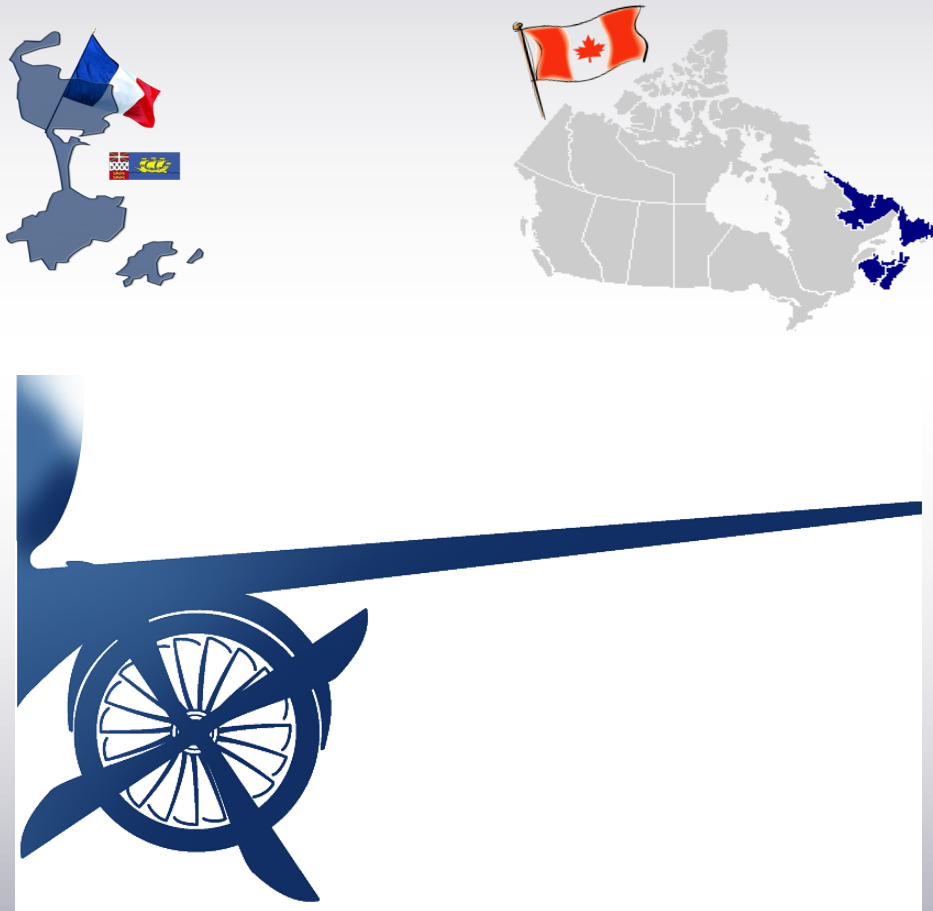
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Intell-Echo

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Publication of the Economic Information Observatory (EIO) for
Regional Cooperation between
Atlantic Canada and Saint-Pierre and Miquelon, France



Aerospace Industry

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